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OBIEE Quick Reference Guide

Topic: How to Run and Download an Existing Report

There are two options for completing this topic: [Accessing a Report through a Dashboard](#) or [Accessing a Report through the Catalog](#).

Note: The dashboards, reports, and analysis columns that you are able to view depend on your assigned security roles and access in OBIEE, and may differ from the options shown in this quick reference guide.

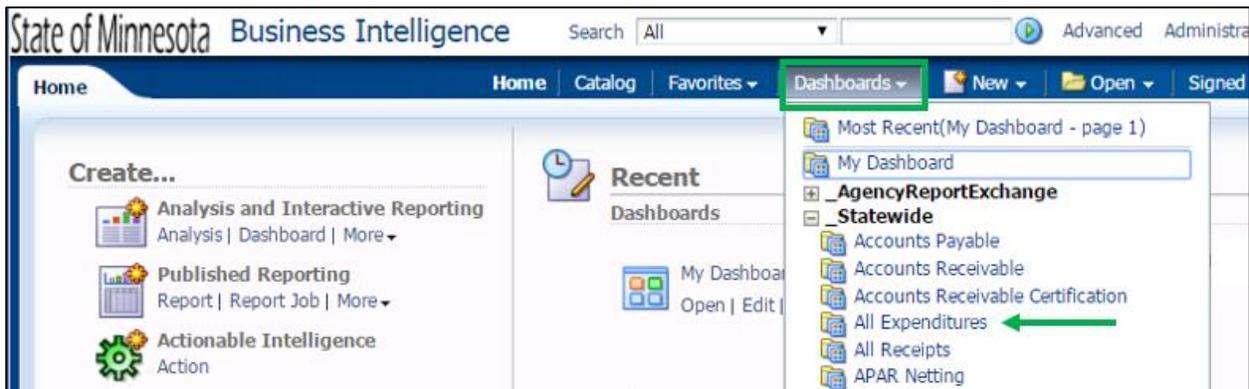
1 ACCESSING A REPORT THROUGH A DASHBOARD

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

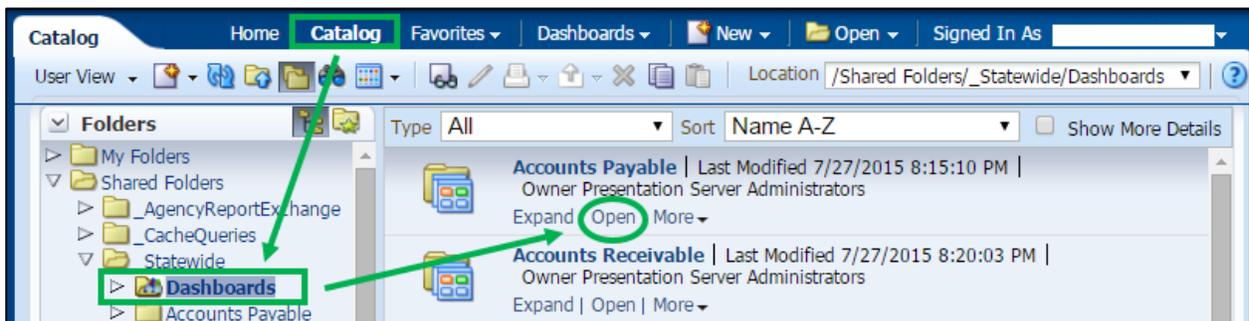
1.1 NAVIGATE TO THE REPORT

1.1.1 Select the “All Expenditures” dashboard from the “_Statewide” dashboard folder.

To navigate to a report on a dashboard, you will need to select the desired dashboard from the “Dashboards” dropdown list in the OBIEE menu bar.



Alternately, you can navigate to the dashboard through the OBIEE Catalog. From the Folders list on the left side of the page, double-click to expand the “Shared Folders”, then the “_Statewide” folder, then the “Dashboards” folder, and click the “Open” link beneath the “All Expenditures” dashboard.



1.2 RUN THE REPORT

Many dashboards will have dashboard prompts that you can change, so that you can customize the report data that is returned. The dashboard will also have a Results section that will automatically display the report with the default prompt settings when you open the dashboard page.

1.2.1 Change the “Agency” dashboard prompt to your agency code and click “Apply”.

In the example below, the following prompt values are selected: “Budget Period” is 2016, “Agency” is G10, “GL Posted Day Dt” is between 07/01/2015 and 9/30/2015, and “Fund” is 1000. You may select any prompt values that you would like to view.

1.2.2 View the report with the applied prompts in the “Results” section.

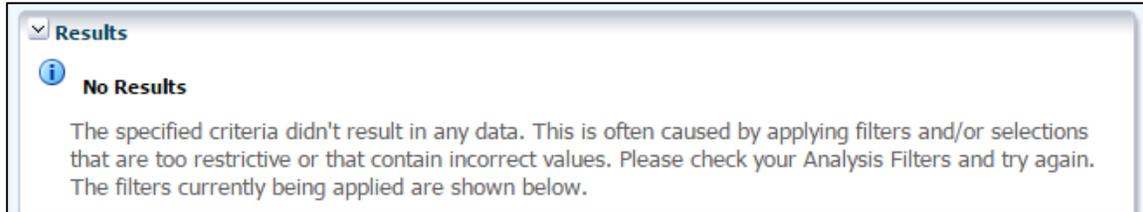
Once you click the “Apply” button, you may see a loading screen while the report data is retrieved. This can take several minutes to process, depending on how broad or narrow your prompt constraints are. The dashboard will display the report results, based on your selections for the dashboard prompts.

| Fund | Appropriation (CF3) | Department - Financials | Fact All Expenditures | Department Tree - Exp | | Appropriation (CF3) | |
|-----------------------------|--|---------------------------------|-----------------------|-----------------------|---------------|----------------------------|---------------|
| Fund | Appropriation | Fin Department | Monetary Amt | Approp Dept Id | Altmt Dept Id | Bdgt Program | Bdgt Activity |
| 1000 - General | G100001 - Accounting Services | G1031100 - Payroll Services | | G1010000 | G1021100 | G1001 - Statewide Services | G100101 - A |
| 1000 - General | G100001 - Accounting Services | G1031200 - Statewide Accounting | | G1010000 | G1021200 | G1001 - Statewide Services | G100101 - A |
| 1000 - General | G100001 - Accounting Services | G1031251 - Bank Fees | | G1010000 | G1021251 | G1001 - Statewide Services | G100101 - A |
| 1000 - General | G100001 - Accounting Services | G1031300 - SWIFT System Support | | G1010000 | G1021300 | G1001 - Statewide Services | G100101 - A |
| 1000 - General | G100001 - Accounting Services Total | | | | | | |
| 1000 - General Total | | | | | | | |
| Grand Total | | | | | | | |

Budget Period is equal to **2016**
 and LEFT(Agency (L2) Cd, 3) is equal to **G10**
 and Fund is equal to **1000 - General**
 and Appropriation is equal to **G100001 - Accounting Services**
 and Appropriation (L3) Cd is equal to **G1010000**
 and Monetary Amt is not equal to / is not in **0**
 and GL Posted Day Dt is between **07/01/2015** and **09/30/2015**
 or GL Posted Year Num is equal to / is in **0**

[Analyze](#) - [Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

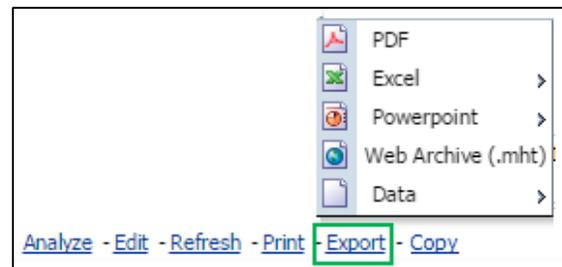
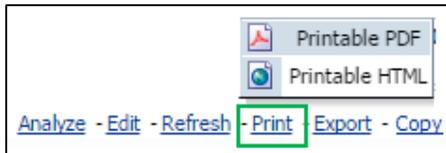
You may get a notification that no results have been returned, if your prompt settings are too restrictive and no data is applicable.



1.3 DOWNLOAD THE REPORT

1.3.1 Click the "Export" link, and select the "PDF" option.

There are two ways to download the report from the dashboard. At the bottom of the "Results" section, there are several action links available. You can select either the "Print" link, which has the option of displaying the report in "Printable PDF" or "Printable HTML" formats; or you can select the "Export" link, which allows you to save the report as the following file types: PDF, Excel (as Excel 2003 or Excel 2007+), Powerpoint (as Powerpoint 2003 or Powerpoint 2007+), Web Archive (.mht), or Data file (as CSV Format, Tab Delimited Format, or XML Format).



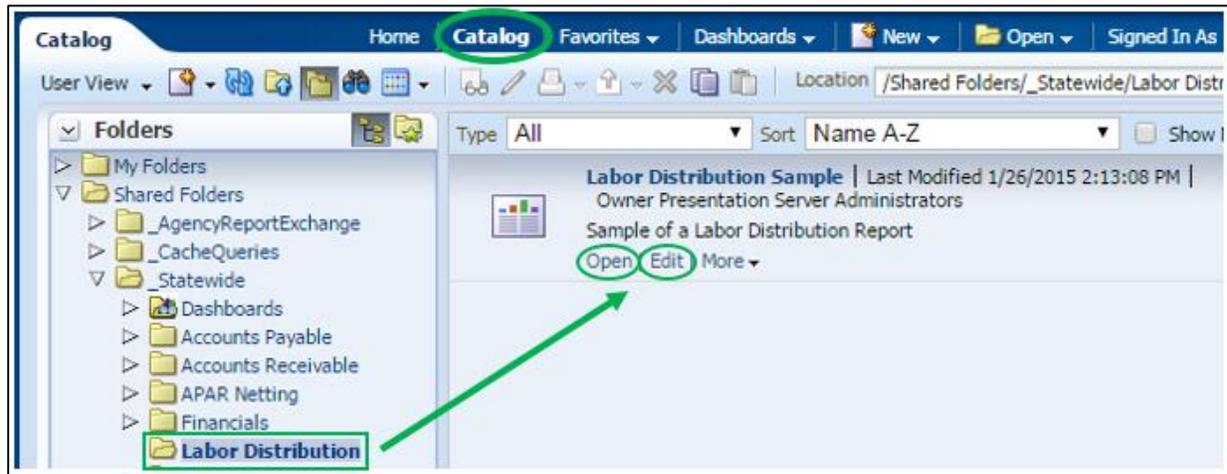
2 ACCESSING A REPORT THROUGH THE CATALOG

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

2.1 NAVIGATE TO THE REPORT

2.1.1 Open “Labor Distribution Sample” in the “_Statewide: Labor Distribution” folder.

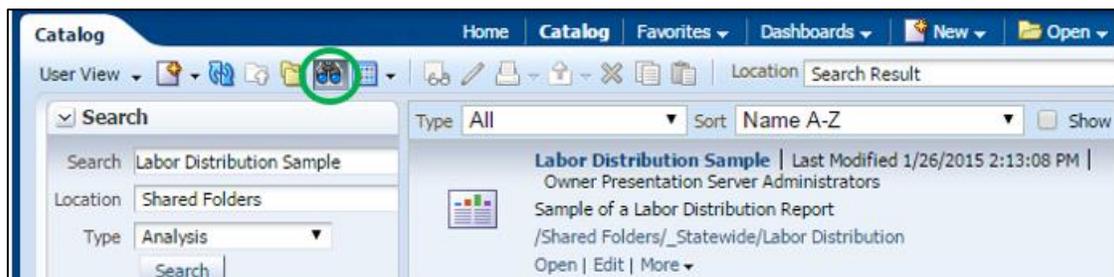
Click the “Catalog” option from the OBIEE menu bar at the top of the screen. From the Folders list on the left side of the page, double-click to expand the “Shared Folders”, then the “_Statewide” folder, then the “Labor Distribution” folder, and click either the “Open” link or the “Edit” link beneath the “Labor Distribution Sample” report.



2.1.2 Optional Method: Use the Catalog Search to find the “Labor Distribution Sample” report.

If you don’t know the location of a report, but you know part of the name, you can run a search for it.

- At the top of the Catalog screen, click on the binoculars icon to open the Search function.
- In the “Search” box, enter the name of the report to find. For this example, type in “Labor Distribution Sample”.
- In the “Location” box, you can choose a specific folder to search, or you can do a broader search in “My Folders”, “Shared Folders”, or “All”. For this example, select “Shared Folders”.
- In the “Type” box, you can choose what type of item you are searching for, or search for all item types. For this example, select “Analysis” (always use this option to find a report).
- Click the “Search” button. All items matching your search specifications will appear in the pane on the right side. For this example, click either the “Open” link or the “Edit” link beneath the “Labor Distribution Sample” report.



2.2 RUN THE REPORT

There are two ways to run the report, depending on if you selected the “Open” link or the “Edit” link.

2.2.1 Report “Open” Link: Select the analysis prompt values and click “OK” to run the report.

Some reports have “inline prompts” (similar to dashboard prompts) that allow you to customize which report data is returned. These prompts must be selected before the report will run. If the report does not have inline prompts, it will automatically run the report results based on any analysis filters in place.

For this example with the “Labor Distribution Sample” report, the following inline prompt values are selected: “Agency Num” is between G10 and G10, “Fund Cd” is between 1000 and 1000, “Process Pay End Dt” is between 07/14/2015 and 07/28/2015, and “Account Cd” is between 41000 and 41000.

You may select any prompt values that you would like to view. Click the “OK” button to run the report.

2.2.2 Report “Edit” Link: Change report filters in Criteria, then run the report in Results.

When you click the “Edit” link for a report from the Catalog, you will see the editing view of the report, where you can make changes to how the report looks and what data is included. For this example, we will change the filters that are applied to the report, which will affect the data that is returned.

2.2.2.1 Add a new filter by choosing the Column Options: Filter selection.

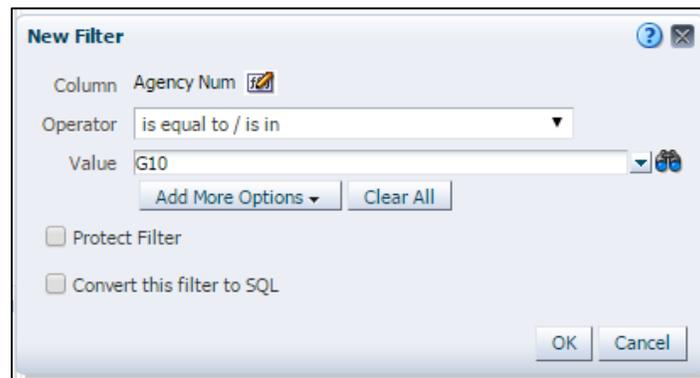
If there is not an existing filter listed in the Filters pane for a specific column, you can add a new filter by clicking the Column Options icon to the right of the column name, then selecting the “Filter” option.

2.2.2.2 Edit an existing filter by clicking the Edit icon next to the filter name.

If you want to change the filter settings for an existing filter that is listed in the Filters pane, hover over the name of the filter and click the Edit icon (pencil icon) that appears to the right of the filter.

2.2.2.3 Set the desired filter Operator and Value.

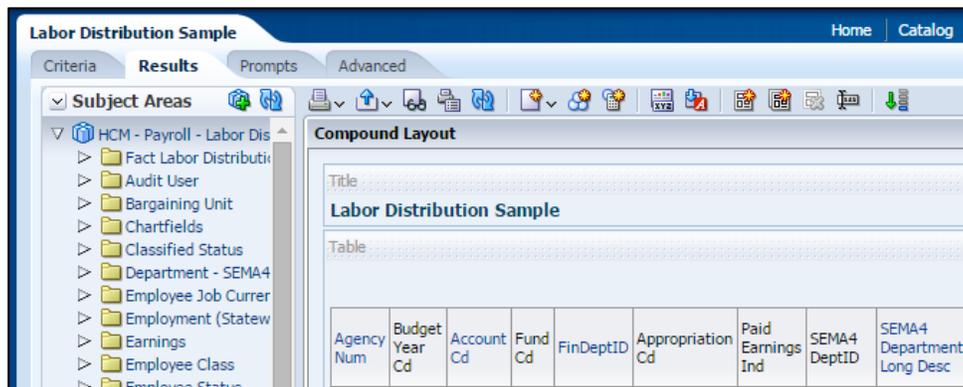
A window will appear with the title “New Filter” or “Edit Filter”. For this example, add a filter for the “Agency Num” column (the first column listed in the Selected Columns pane), and select the Operator “is equal to / is in” and enter the Value “G10”. Click the OK button to create the filter.



For this example, add or edit these additional filters: “Fund Cd” is equal to 1000, “Process Pay End Dt” is between 07/14/2015 and 07/28/2015, and “Account Cd” is equal to 41000.

2.2.2.4 Run the report by clicking on the Results tab.

Once you have added the necessary report filters, you can view the results of the analysis by clicking on the Results tab, which will load the data in an existing report view.



2.3 DOWNLOAD THE REPORT

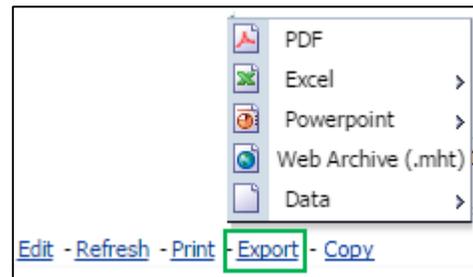
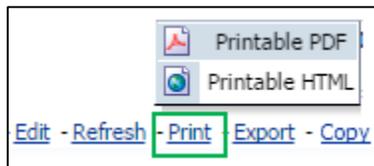
The location of the “Print” and “Export” links depends on whether you selected the “Open” link or the “Edit” link when accessing the report.

2.3.1 Report “Open” Link: Click the “Export” link at the bottom, and select the “PDF” option. Once you click the “OK” button for the inline prompts, or if the report was opened and did not have prompts, you may see a loading screen while the report data is retrieved. This can take several minutes to process, depending on your inline prompt selections. Your results will display on the report page.

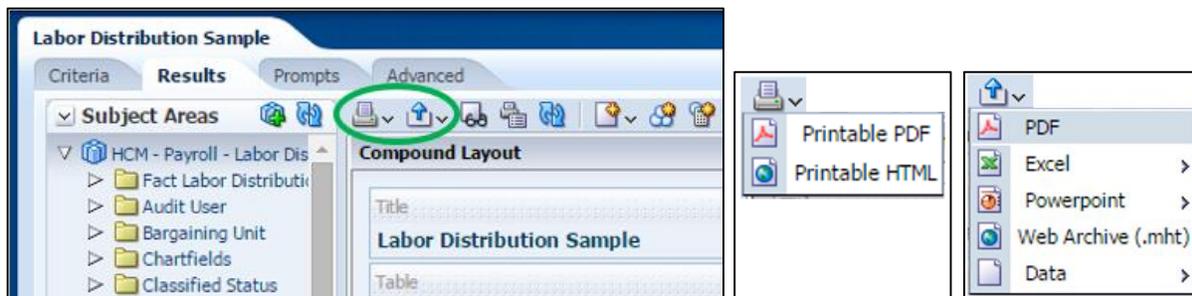
| Agency Num | Budget Year Cd | Account Cd | Fund Cd | FinDeptID | Appropriation Cd | Paid Earnings Ind | SEMA4 DeptID | SEMA4 Department Long Desc |
|------------|----------------|------------|---------|-----------|------------------|-------------------|--------------|--------------------------------|
| G10 | 2015 | 41000 | 1000 | G1037000 | G100007 | Y | G100070 | Human Resources Mgmt Statewide |

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

At the bottom of the report page are two options for downloading the report. The “Print” link has the option of displaying the report as “Printable PDF” or “Printable HTML” format. The “Export” link allows you to save the report as the following file types: PDF, Excel, Powerpoint, Web Archive, or Data file.



2.3.2 Report “Edit” Link: Click the “Export” icon at the top, and select the “PDF” option. Once you click the Results tab, you may see a loading screen while the report data is retrieved. This can take several minutes to process, depending on your filter selections. The Compound Layout pane will display the report results.



Above the “Compound Layout” pane heading are several icons. The “Print” button (printer icon) can display the report in “Printable PDF” or “Printable HTML” format. The “Export” button (blue arrow icon) allows you to save the report as the following file types: PDF, Excel, Powerpoint, Web Archive, or Data file.