An Introduction to
Oracle Business Intelligence (OBI)

Introduction

What is OBI

OBI is a web-based reporting tool that enables users to analyze and report on data stored in various sources on a one-off or repeating schedule.

It provides a comprehensive business intelligence platform that offers a full range of analytic and reporting capabilities. Designed for scalability, reliability, and performance, it delivers results that improve decision-making and enable better-informed actions and more efficient business processes.

OBI receives data from PeopleSoft and other systems overnight. Therefore, the most recent data available in OBI is from the previous day.

What is a Dashboard?

Stephen Few is an innovator, consultant and educator in the fields of business intelligence (a.k.a. data warehousing and decision support) and information design. In his book Information Dashboard Design, Stephen describes an informational dashboard as:

> "...a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance."

Accessing OBI

1. OBI should be used in the Firefox Browser for the best results.

2. You can reach OBI by:

    a. Typing **obi.humboldt.edu** in the browser address bar or

    b. Going to **my.humboldt.edu** and choosing OBI under Faculty/Staff Resources.
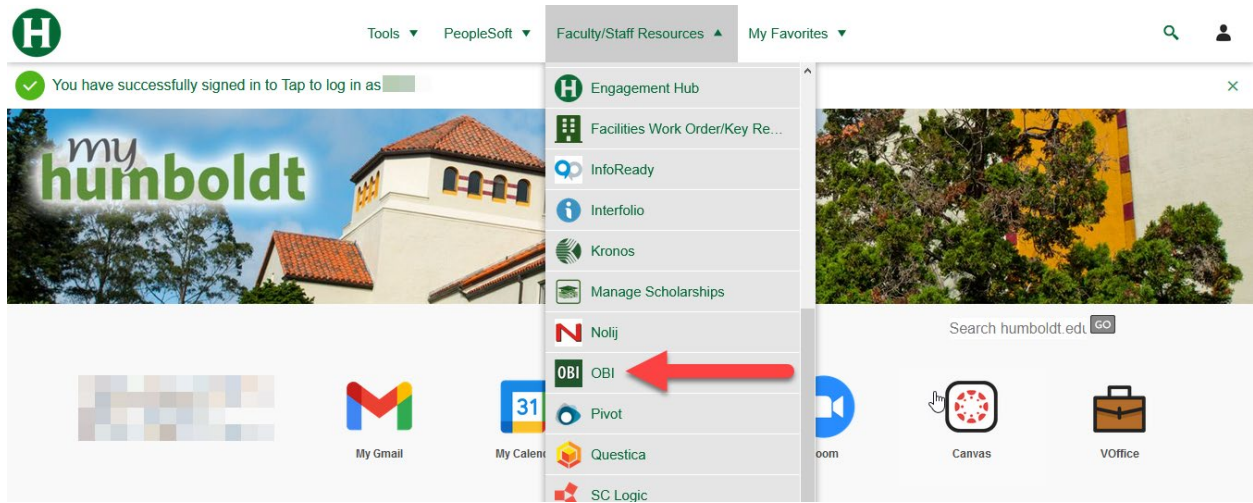
3. Enter your HSU ID, password and select the Login button.

4. You will be taken to the Home screen, which displays recently accessed reports.
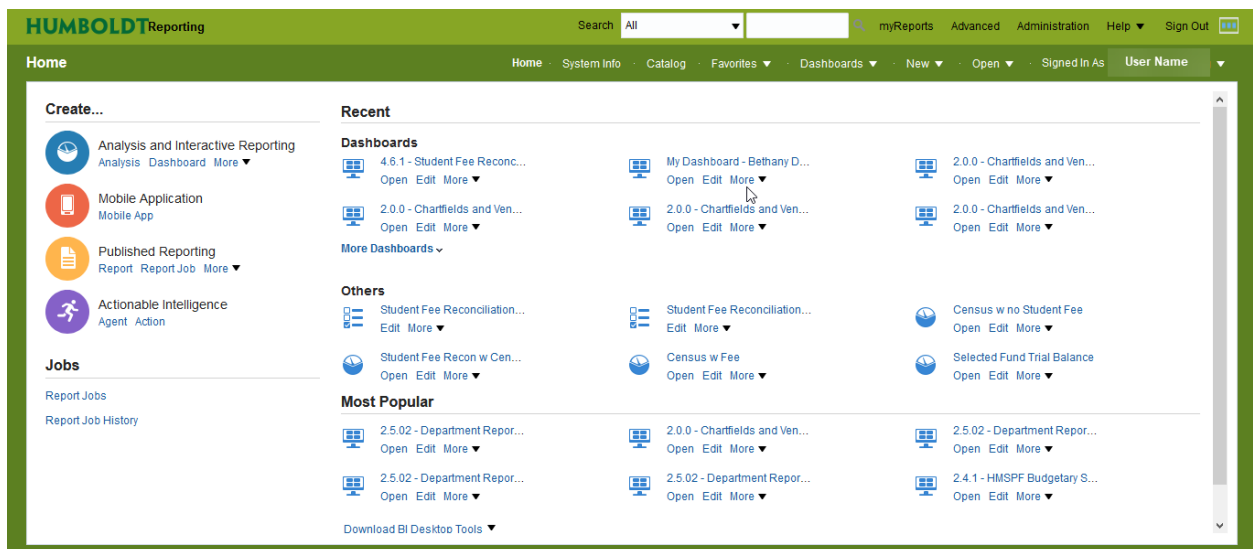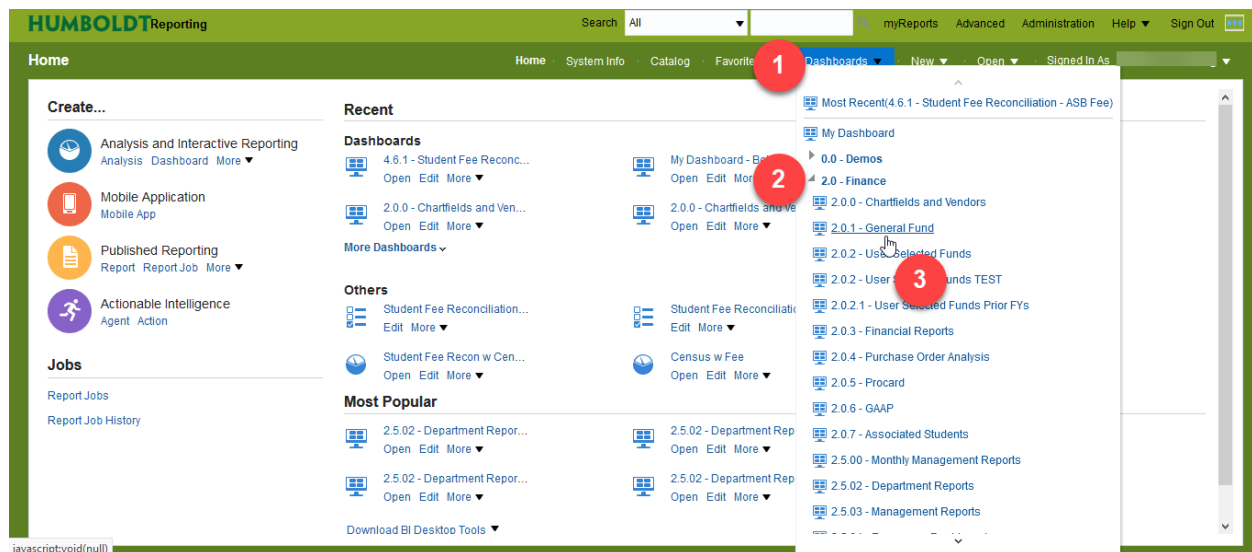
Viewing Dashboards

1. Select **Dashboards**. It can be found in the dark green area at the top of the page.

2. We are looking for General Fund data, so we are going to click the arrow next to **2.0 Finance**.

   The list of options displayed are dashboards. Dashboards are used to display data in various useful ways.

3. To view the General Fund data we are going to select the **2.0.1 General Fund** dashboard.

4. You should see the following dashboard. The dashboards you are allowed to see are limited by your permissions.
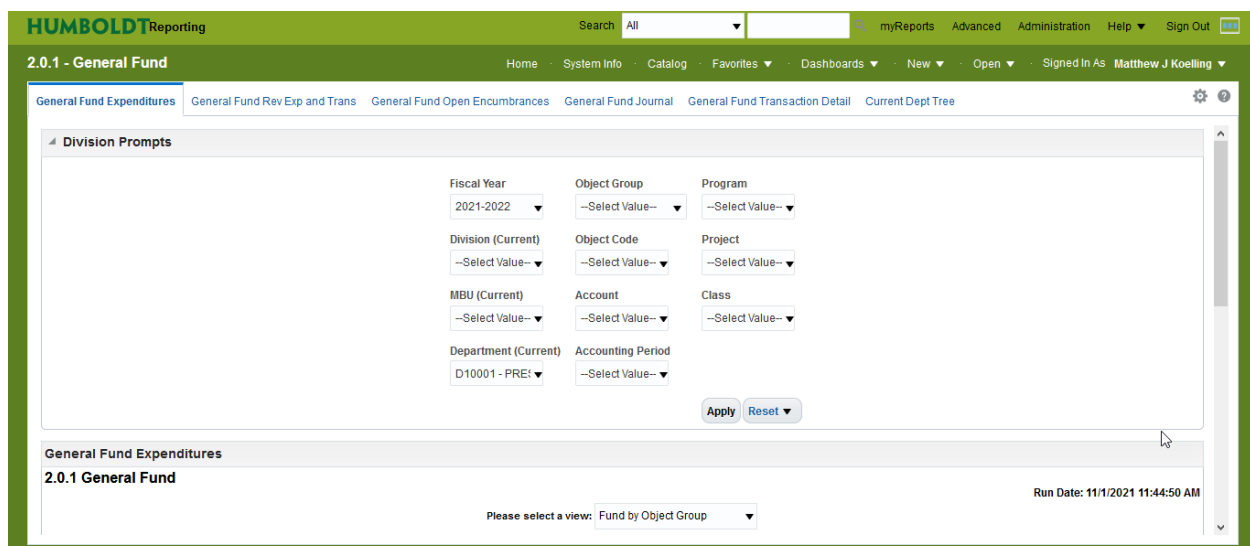
Anatomy of a Dashboard

In general a dashboard consists of three parts, a prompt, an analysis, and a filter.

Prompt

The prompt is where the results of the analysis can be altered. We will be going into more detail about this section later.

Fiscal Year	Object Group	Program
2021-2022 ▼	--Select Value-- ▼	--Select Value ▼

Division (Current)	Object Code	Project
--Select Value ▼	--Select Value ▼	--Select Value ▼

MBU (Current)	Account	Class
--Select Value ▼	--Select Value ▼	--Select Value ▼

Department (Current)	Accounting Period
D10001 - PRE ▼	--Select Value ▼

Apply   Reset ▼

Analysis

General Fund Expenditures
Fund by Object Group

Fund	Object Group	Original Budget	Revised Budget	Actuals	Encumbrances	Balance Remaining	Percent of Budget Spent
	601 - Regular Salaries and Wages	711,954.00	897,618.00	224,404.50	0.00	673,213.50	25.00
	603 - Benefits Group	416,910.00	483,681.00	115,408.42	0.00	368,272.58	23.86
	604 - Communications	511.00	511.00	0.00	0.00	511.00	0.00
	606 - Travel	39,500.00	39,500.00	1,464.83	0.00	38,035.17	3.71
	613 - Contractual Services Group	0.00	25,500.00	15,499.00	0.00	10,001.00	60.78
	616 - Information Technology Costs	4,500.00	5,008.00	1,403.99	0.00	3,604.01	28.03
	619 - Equipment Group	0.00	82.00	266.56	0.00	(184.56)	325.07
	660 - Misc. Operating Expenses	26,838.00	182,582.00	15,380.81	145.38	167,055.81	8.50
- OPERATING FUND Total		1,200,213.00	1,634,482.00	373,828.11	145.38	1,260,508.51	22.88
Grand Total		**1,200,213.00**	**1,634,482.00**	**373,828.11**	**145.38**	**1,260,508.51**	**22.88**

The analysis is where the data is presented.

Filters

At the bottom of every Analysis you will see an important section known as the Filters. These filters are displayed to let users confirm consistent and accurate data.

|		
Fund - General Fund		View
and **Account - Expenditures**		View
and	Department (Current) is equal to **D10001 - PRESIDENT'S OFFICE** and Fiscal Year is equal to **2021-2022**	
and **Finance Users Accounting Period 0 View**		View

Using Favorites

Favorites allow you to return quickly to dashboard pages you use frequently.

1. Navigate to the dashboard page you are interested in adding to your Favorites. For this example we are using 2.0.1 General Fund dashboard.

2. In the dark green area at the top of the page, select **Favorites**.

3. Select **Add to Favorites**.
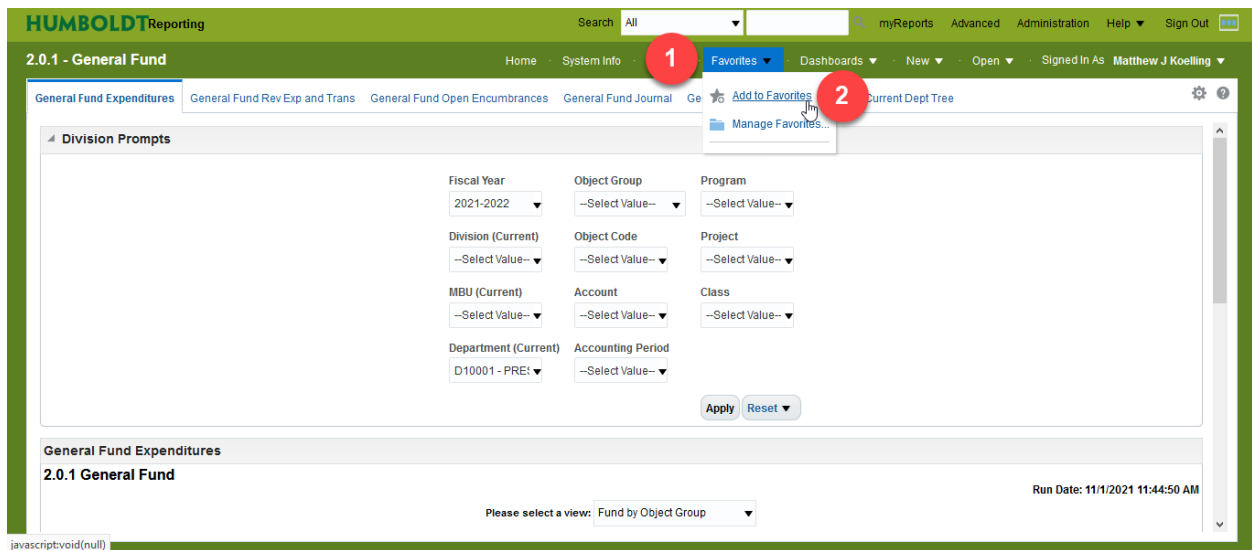
4. The page will appear under the Favorites menu.
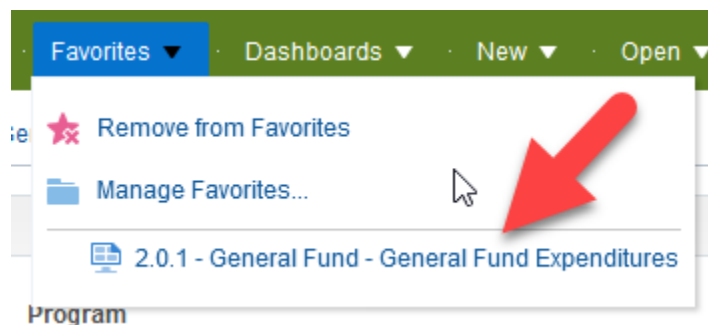
5. You can choose **Manage Favorites** to organize favorites into subfolders and reorder links.

Filtering Data

Using Prompts

You can choose the data you would like to view by using the prompts at the top of the report.

1. Click on the **down arrow** on any part of a prompt to display available options.

2. Select **More/Search** if you don't see the option you're looking for.
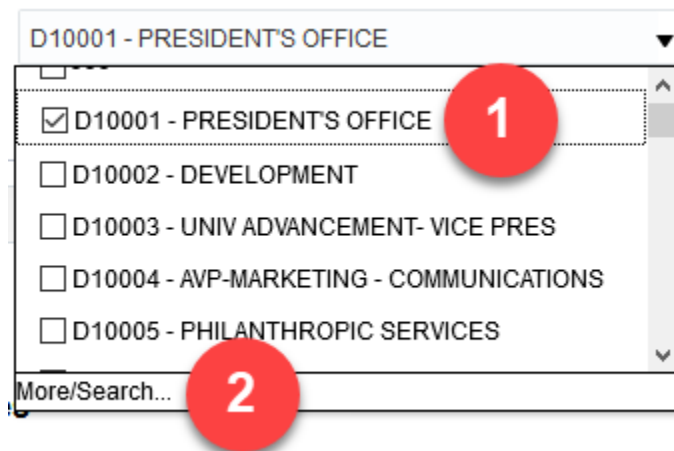
3. The dropdown next to **Name** are several options for searching.

4. Enter in a search term in the **Text Box**.

5. You also have a **Check Box** to **Match Case**.

6. Click on the **Search** button.

We recommend you choose **Contains** and uncheck **Match Case**. This will provide the most flexibility when searching.
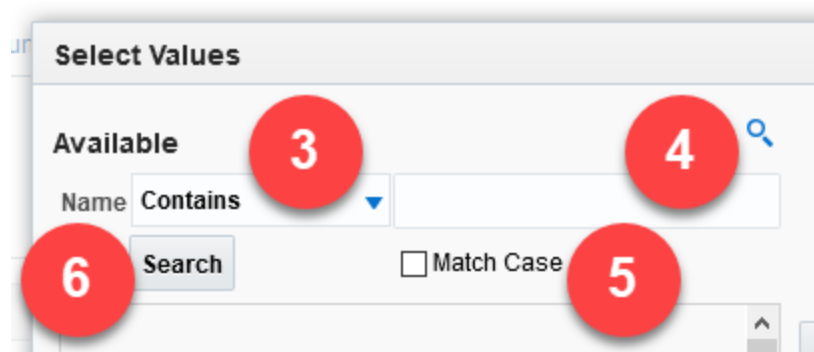
7. Highlight an item from the list on the left.

8. Click on the **Move** button or **double click** on the item.

9. The item will move to the right **Selected** portion of the screen and will appear in the report.
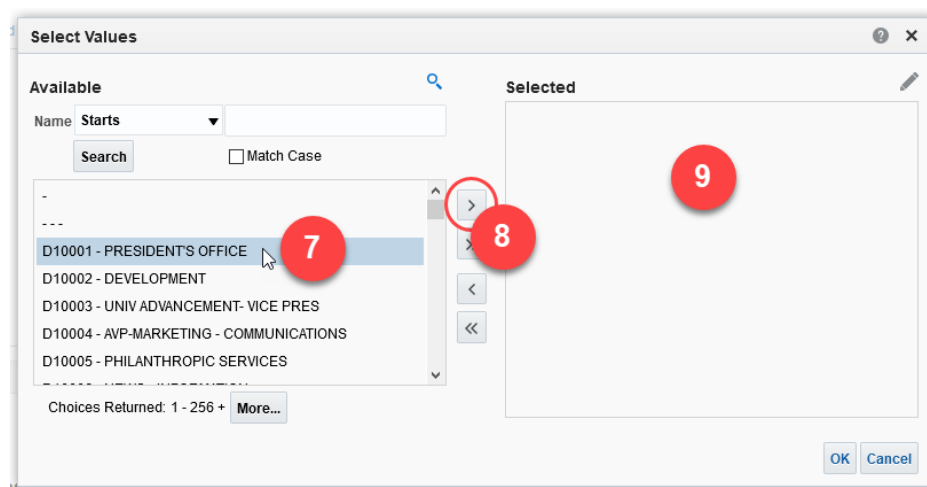
10. To remove an item from the **Selected** box highlight the item.

11. Click on the **Remove** button or alternatively **double click** on the item.

12. **Move All** and **Remove All** double arrows affect all items in the displayed list, regardless of what is highlighted.

13. Click the **OK** button to accept the selected items and return to the dashboard.

14. On the dashboard, select the **Apply** button in the **Prompt** area to view the results.

OBI Tip #2

Sometimes the prompts on a dashboard might disappear. If you don't see the prompt, click on the triangle button beside the Prompt area name to make the Prompt visible.

Hiding the prompt is a great way of letting you see more of the analysis without scrolling.

Prompt Visable   Prompt Hidden
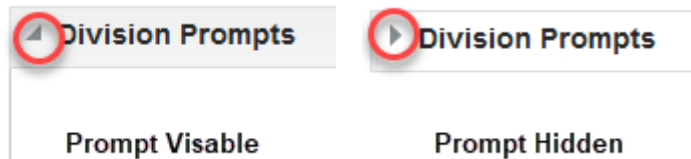
Using Views

Views are used to display the same dataset in different ways. Different columns and groupings levels may be available in different views. Some analyses don't offer views but it is easy to identify the ones that do.

1. An analysis will have a view selector above the results if different views are available.

2. An analysis may only have one alternate view, some will have multiple different views.
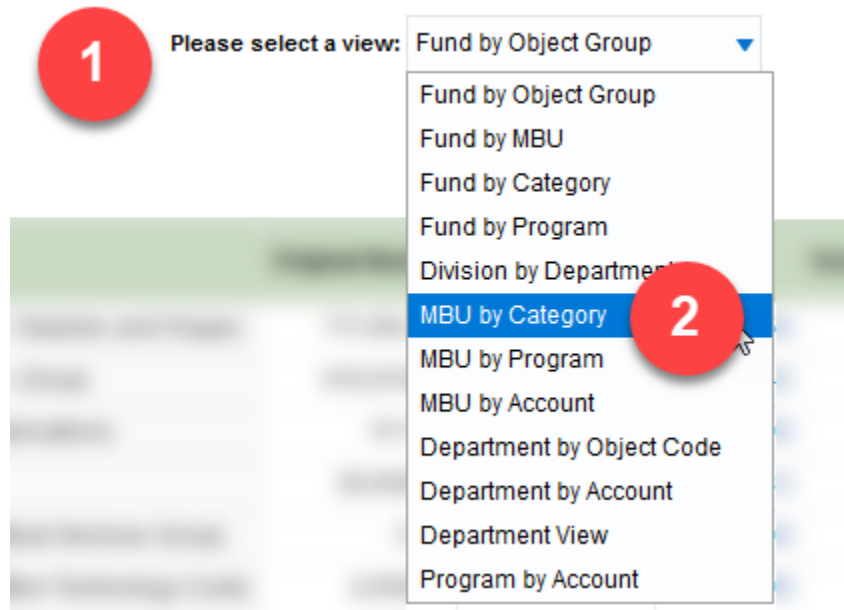
View Additional Details

If an item is displayed in blue and the cursor changes to a hand when you move your mouse over it, you can get more details about the source.

1. Click on the value

2. You will be presented with one to several options to choose from.

Fund	Object Group	Original Budget	Revised Budget	Actuals	Encumbrances	Balance Remaining	Percent of Budget Spent
HM500 - OPERATING FUND	601 - Regular Salaries and Wages	711,954.00	897,618.00	224,404.50	0.00	673,213.50	25.00
	603 - Benefits Group	416,910.00	483,681.0				23.86
	604 - Communications	511.00	511.				0.00
	606 - Travel	39,500.00	39,500.00	1,464.83	0.00	38,035.17	3.71

3. Regardless of what you select, a new analysis will open. Depending on what you chose the analysis will present details in different ways depending on what was selected.
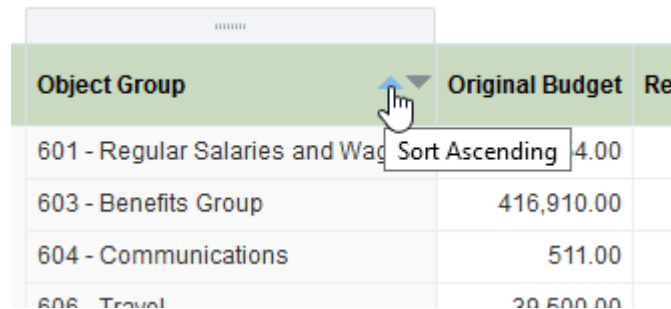
For example:

- Supplies will provide information about who was paid and how much.

- Data like wages, medical, retirement, life and vision Insurance are calculated on a per person basis. You can drill down to see who the expenses are related to.
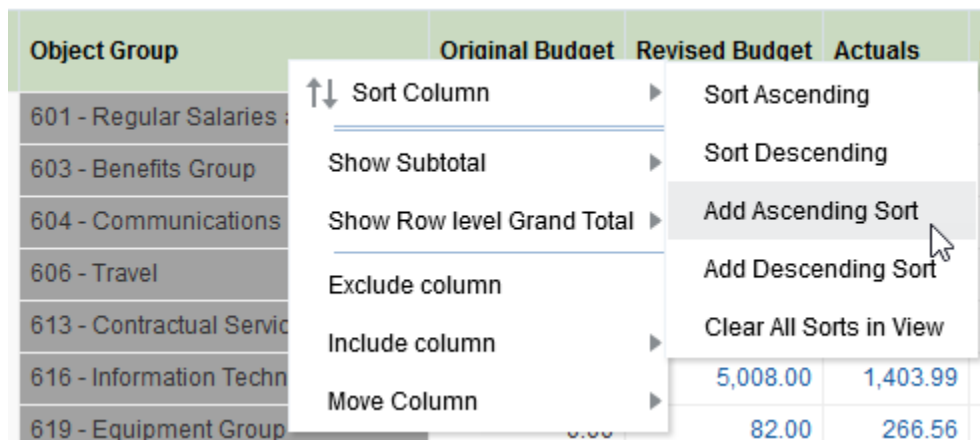
Columns

Sorting Columns

1. You may sort the data by using the blue arrows next to the column name. By default, all data will be sorted by the columns from left to right.

2. More search options are available by right-clicking on the column title and choosing **Sort Column**.

Moving Columns

If you would like to change the order of the columns in the report, you can move them.

1. Move the cursor over the grey bar that appears above the column heading until it turns into a four pointed arrow.
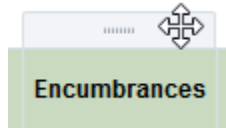
2. Click and drag the bar. Hold the mouse button and move the cursor between the columns where you would like the column to appear until a bold vertical line appears; then release the mouse button.

3. Columns can also be moved to create selectors and summaries.

Excluding Columns

There may be times where you do not need to view the data in a particular column. Excluding columns is especially helpful when printing a report, as this can result in a report that fits more easily on the printed page.

4. Right click within the column.

5. **Choose Exclude Column** in the menu that appears.

6. Excluding additional columns will reduce the number of rows and summarize information, which can then be drilled into.

7. If you exclude a column by mistake, use the **Clear My Customization** menu option as [detailed below](#).
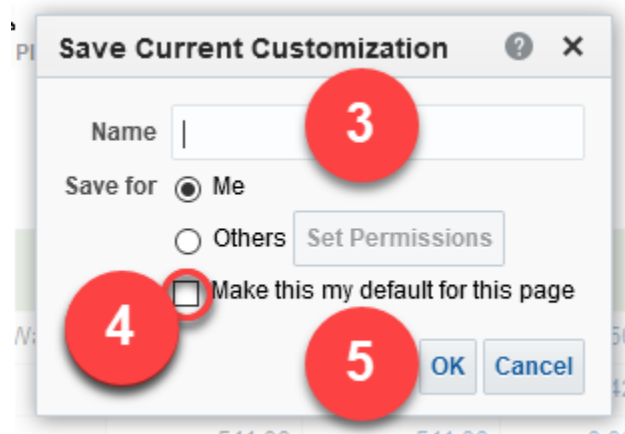
Customizations

Saving Your Customizations

You can save the changes you have made. Saving the view saves the chosen funds, fiscal year, as well as the excluded columns. The data will still be refreshed each time you visit the page. When you save these **Customizations** they only apply to the current page or tab.

1. Select the **Page Options** button.

2. Choose **Save Current Customization** . . .
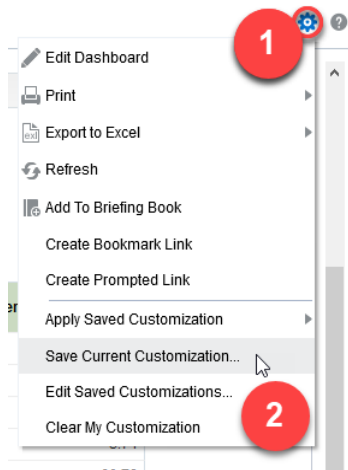
3. Add a name for the customization in the **Text Box** that appears. The name should be something that is meaningful to you.

4. Check the **Make this my default for this page** to have this same view appear everytime you visit this specific page.

5. Click on the **OK Button** to save this customization.

Clearing Customizations

You can clear customizations if you want to create different ways to view the page.This returns you to the default layout, though it will not delete any saved customizations.

1. Select the **Page Options Button**.

2. Choose the **Clear My Customization** option in the menu.
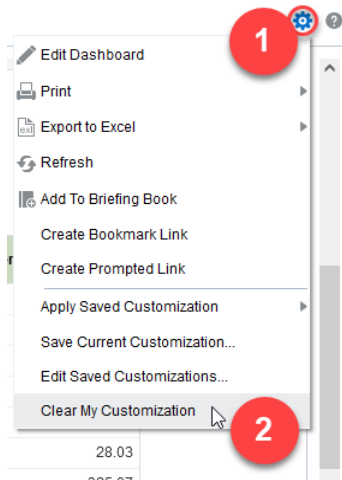
Apply a Saved Customization

1. Select the **Page Options Button**.

2. Select **Apply Saved Customization**.

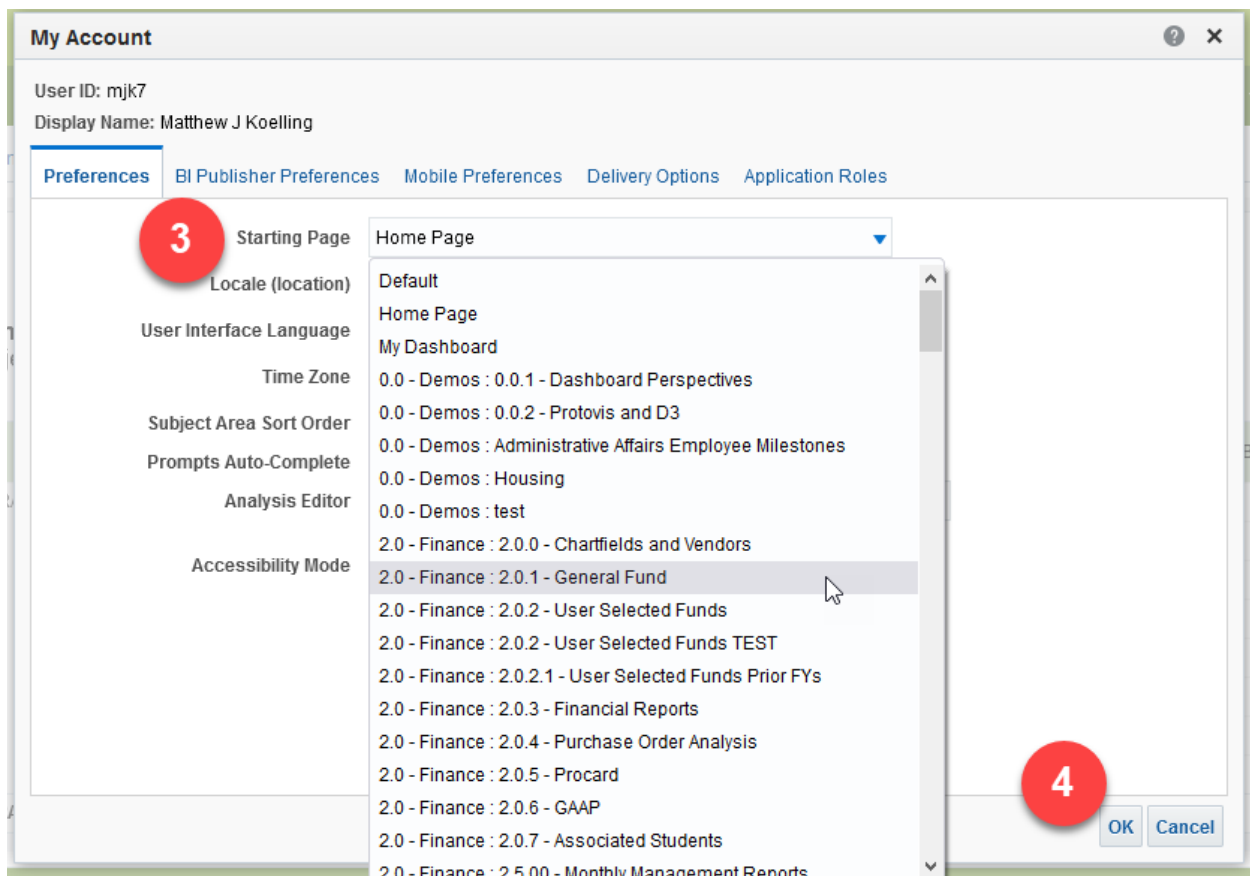3. Choose the customization you would like to apply.
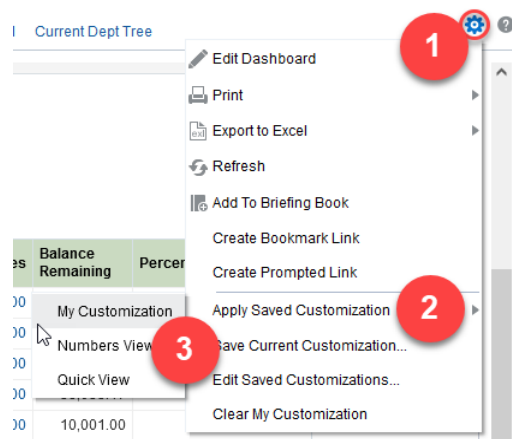
Setting the Starting Page

1. Click on your **Login Name**. It can be found in the dark green area at the top of the page.

2. Select **My Account**.

3. Select **Starting Page** and choose the dashboard you would like to open when you start OBI.
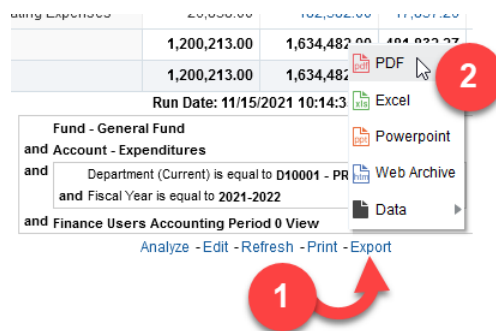
4. Select **OK Button**.

Exporting & Printing

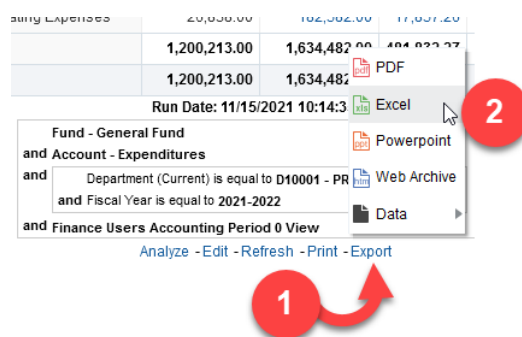At the bottom center of each analysis there are Print and Export links.

Exporting a Report for Printing

1. Click on **Export**.

2. Choose **PDF**.

3. The file will open in a PDF viewer and can be printed or saved.

Editing a Report for Printing

1. If you would like to edit the file before printing, click on **Export**.

2. Choose **Excel**.

3. You will be prompted to **Download** or **Open** the file in Excel. Its recommended you download it so you can save your edits.

4. The appearance of the file in Excel will be similar to the appearance online.This version is helpful if you would like to exclude columns, modify text, change colors, etc.

Exporting the Entire Dashboard

The entire dashboard can be exported to Excel.

1. Select **Page Options Button**.

2. Choose **Export to Excel**.

3. Then choose **Export Entire Dashboard**.
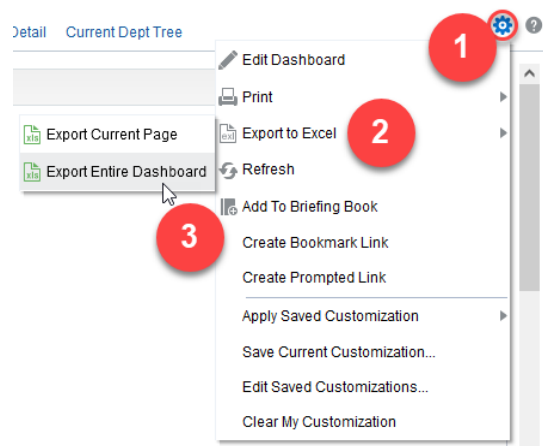
Exporting Data for Analysis

Exporting data using this method produces a spreadsheet with an unformatted block of data, which is useful when creating Pivot Tables and other types of analyses.

1. Click on **Export**.

2. Choose **Data**.

3. Select **Tab Delimited Format**.
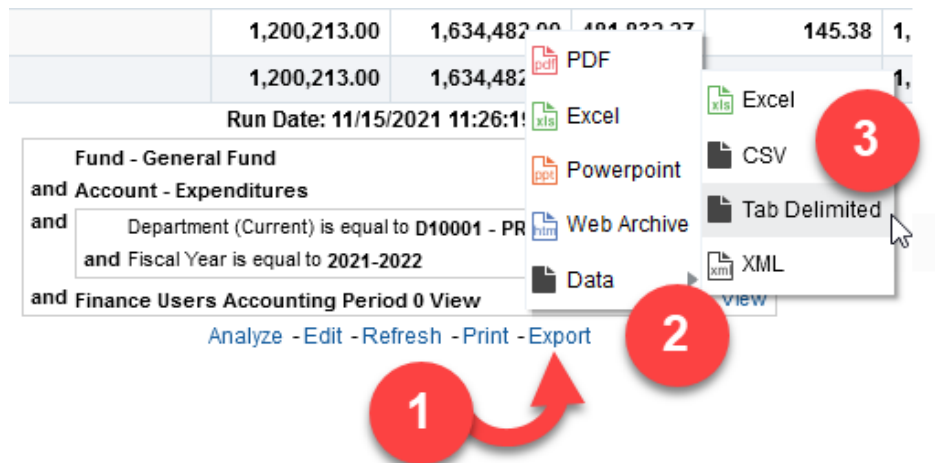
Viewing Data Using the Catalog

Occasionally, you may need to access a report that is not available via the Dashboards menu. You can do this using the Catalog, which allows you to view all reports and dashboards that you have access to.

1. Select the **Catalog**. This view shows all the Dashboards available to you.

2. Select **Shared Folders** on the left of the screen.

3. Select the **Subfolder** for the particular subject area.

4. Select **Reports** to view any reports that you have access to.