



An Introduction to Oracle Business Intelligence

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Introduction

What is OBI

OBI is a web-based reporting tool that enables PeopleSoft users to analyze and report on information stored in the PeopleSoft Finance and Human Resources databases 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.

Mozilla Firefox is the preferred browser to use with OBI.

What is a Dashboard?

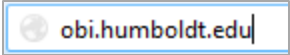
Stephen Few is an innovator, consultant and educator in the fields of business intelligence (a.k.a. data warehousing and decision support) and information design. In his book [Information Dashboard Design](#), Stephen describes an informational dashboard as "...a visual display of the most important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

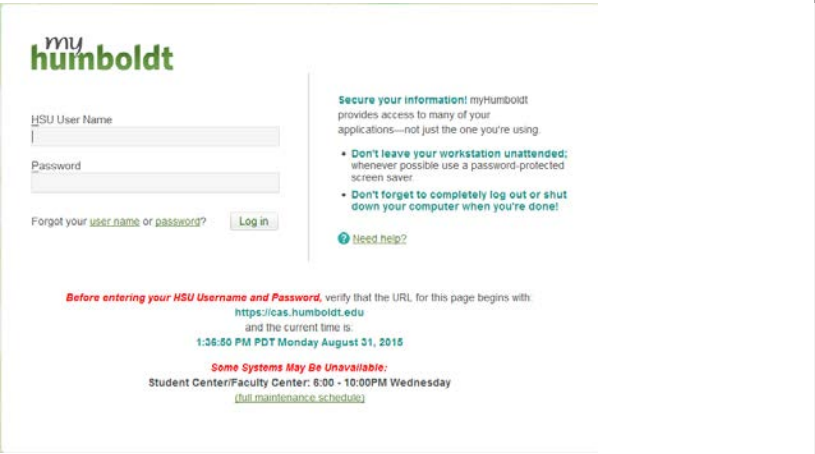
1. Open a web browser. Mozilla Firefox is the preferred browser.



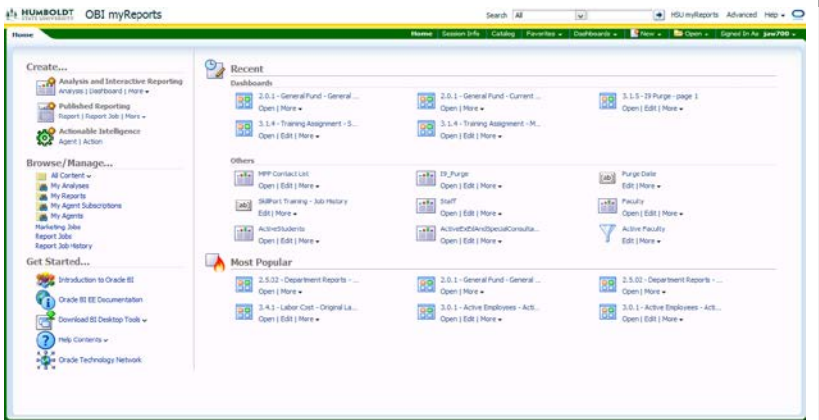
2. Navigate to obi.humboldt.edu by typing the URL into the address bar.



3. Enter your standard HSU username and password and select Sign In.

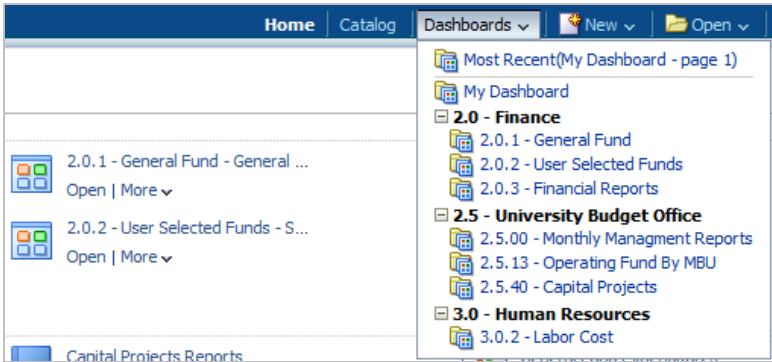


4. You will be taken to the Home screen, which displays recently accessed reports.

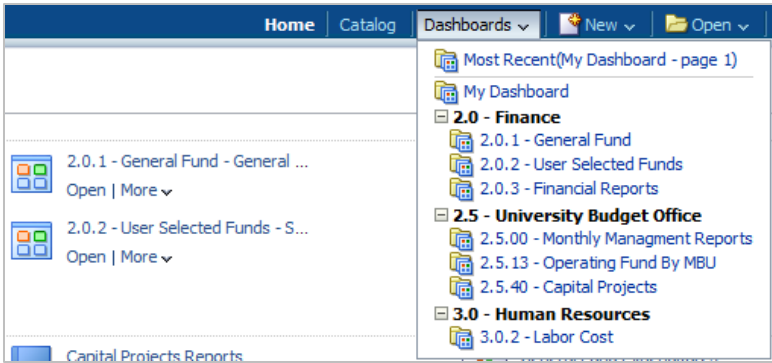


Viewing Data via Dashboards

1. Select Dashboards



2. To view General Fund data, select 2.0.1 General Fund on the Dashboard list (in the 2.0 Finance section)



3. At the bottom of the Analysis you will see a set of filters. These filters are displayed on every report, allowing for consistent data.

Journal Status is equal to / is in **P - Posted to Ledger(s)**
and Ledger is equal to / is in **ACTUALS**
and Fund is equal to / is in **HM500 - CSU OPERATING FUND**
and Department (Current) is equal to / is in **D30035 - FACILITIES PLANNING**
and Program is equal to / is in - - -
and Fiscal Year is equal to **2010-2011**
and Business Unit is equal to **HMCMP**

Using Favorites

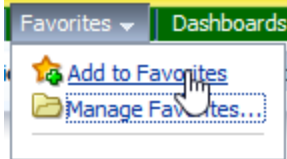
Favorites allow you to return quickly to dashboard pages you use frequently.

1. Navigate to the dashboard page you are interested in adding to your Favorites.

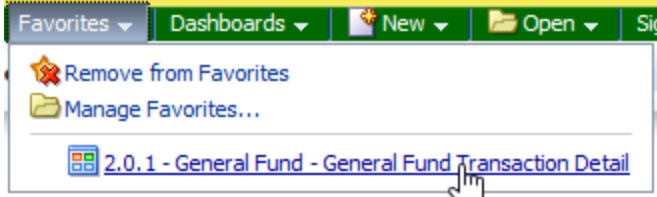
2. In the menu at the top of the page, select Favorites.



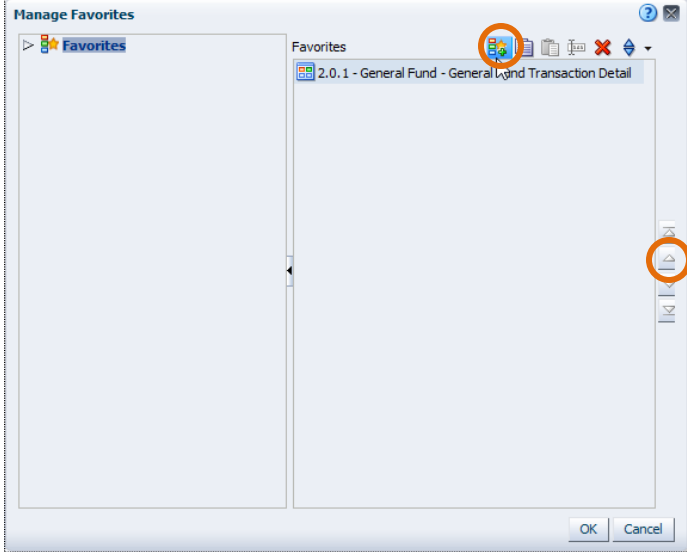
3. Select Add to Favorites.



4. The page will appear under the Favorites menu.



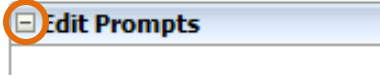
5. Choose Manage Favorites to organize favorites into subfolders and reorder links.



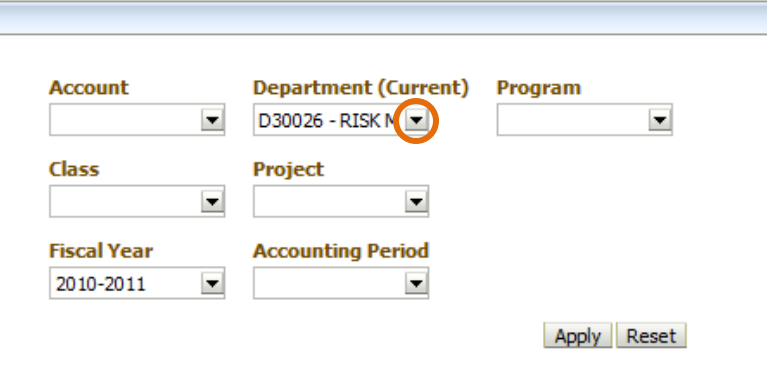
Filtering Data

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

1. If you don't see the edit prompt, click on the button beside Edit Prompts.



2. Click on the down arrow for a prompt to display available options.



3. Select More/Search.



4. Change the dropdown next to Name to Contains and uncheck Match Case. This will provide the maximum flexibility when searching.



5. Enter in a search term and select Search.



6. Highlight an item from the list on the left and select the MOVE button. The item will move to the right "Selected" portion of the screen. The items on the right side of the screen will appear in the report.



7. To remove a department from the "Selected" box, highlight the department(s) and click this button.

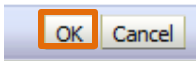
Note: The double arrows (Move all and Remove all) affect all items in the displayed list, regardless of what is highlighted.

Selected

- D30026 - RISK MANAGEMENT
- D30027 - CAMPUS RECYCLING PROGRAM
- D30028 - CONSTRUCTION MANAGEMNT UNIT
- D30035 - FACILITIES PLANNING
- D30036 - FACILITIES DESIGN
- D40001 - STUDENT AFFAIRS-VP OFFICE
- D40002 - ABUSE PREVENTION/AOD EDUC
- D40003 - SA INFO TECH SERVICES
- D40004 - ASSOCIATED STUDENTS HSU

Control buttons: Move, Move All, Remove, Remove All

8. Click OK to accept the selected items and return to the dashboard.



9. On the dashboard, select Apply to view the results.

Account: [] Department (Current): D30027 - CAMPUS RECYCLING PROGRAM;D30028 - COI [] Program: []

Class: [] Project: []

Fiscal Year: 2010-2011 [] Accounting Period: []

Buttons: Apply, Reset

Changing the way data is displayed

1. Use the view selector above the table to change views. Different views may be available for each Analysis. Some analysis do not have additional views.

Note: Views are used to display the same dataset in different ways. Different columns and groupings levels may be available in different views.

Please select a view: MBU by Program

Program	View
---	Fund by Object Group
---	Fund by MBU
---	Fund by Category
---	Division by Department
---	MBU by Category
R0049 - CAMPU	MBU by Program
RS064 - COLLEC	Department by Object Codes
---	Department by Account
---	Department View

View Additional Detail for an Amount

1. If an amount is displayed in blue and the cursor changes to a hand when you move over it, you can get more detail about the source the amount. To do so, click on the number.

\$32,806.00
\$4,431.00
\$0.00

2. Choose Drill to [detail].

Actuals	Balance Remaining	Percent of Budget Spent
0.00	1,000.00	0.00
57,034.75	94,258.25	37.47
507.46	(507.46)	
6.84	(6.84)	
88,087.23	400,471.17	10.85
160,673.64		24.73
600.00		15.00
6,544.30	26,455.70	19.83

- Drill To Journal Lines
- Drill to Transaction Detail

3. A new analysis will open. At this point there are no more blue links, as there is no lower level of data. Varying levels of detail are available based on what numbers are selected.

- Supplies, for example, will provide information about who was paid and how much.
- Wages, Medical, Retirement, Life and Vision Insurance are calculated on a per person basis. You will be able to drill to see who the expenses are related to.
- Some benefits are “pooled,” which limits the extent of detail available. Examples of pooled benefits are Medicare, OASDI, Unemployment and Workers Compensation. On these entries you can only drill down to a lump amount and can’t tell how much is for each employee.

Sorting Columns

1. You may sort the data by using the blue arrows next to the column name

Note: By default, all data will be sorted by the columns from left to right.

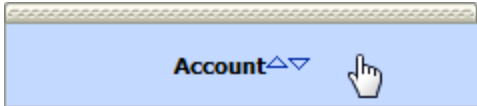
Revised Budget	Actuals	Encu
86,147.00		
16,114.00	10,044.00	

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

Sorting and Excluding Columns

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

1. Right click within the column.



2. Choose Exclude column in the menu that appears.

NOTE: If you exclude a column by mistake, use the Clear My Customization option in the Page Options menu.

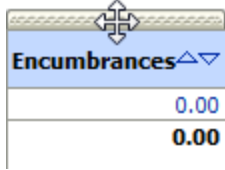
3. Excluding additional columns will reduce the number of rows and summarize information, which can then be drilled into.

Account Type	Prior Year Actuals	Current Month Actuals
50 - Revenues	(\$433,996.88)	\$0.00
50 - Revenues Total	(\$433,996.88)	\$0.00
60 - Expenditures	\$433,996.88	\$0.00
60 - Expenditures Total	\$433,996.88	\$0.00

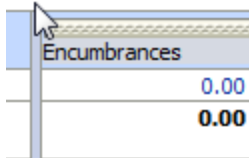
Moving Columns

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 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.

General Fund Expenditures
Fund by Object Group

Fund: HM500 - OPERATING FUND

601 - Regular Salaries and Wages 644,238.00

Balance Remaining	Revised Budget	Encumbrances	Actuals	Percent of Budget Spent
572,418.25	644,238.00	0.00	71,819.75	11.15

603 - Benefits Group 295,147.00

Balance Remaining	Revised Budget	Encumbrances	Actuals	Percent of Budget Spent
264,312.40	295,147.00	0.00	30,834.60	10.45

Locked Headers and Resizable Columns and Rows

Certain reports provide locked/frozen headers and allow you to resize columns and rows. For example: see 2.0.1 - General Fund: General Fund Transaction Detail

- 1. With your cursor over the report table, use the mouse wheel to scroll the report.

General Fund Transaction Detail
Transaction Detail by Accounting Period

Fund	Department (Current)	Accounting Period
HM500 - OPERATING FUND	D10004 - AVP-MARKETING - COMMUNICATIONS	00 (FWD)
		00 (FWD) Total
		01 (Jul)

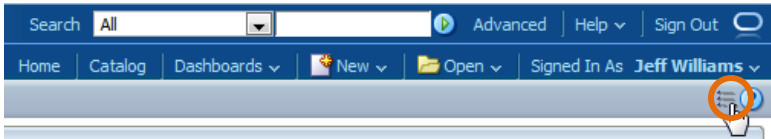
- 2. Place your cursor on the column or row boundary. Click and drag to resize.

601201 - MANAGEMENT + SUPERVISORY	-
601300 - SUPPORT STAFF	---

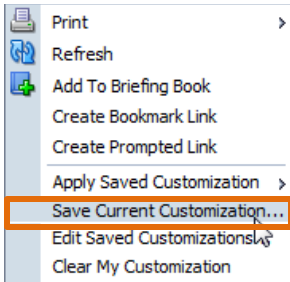
Save the Current Changes

You can save the changes (customizations) you have made. This is called saving a customization. Saving the view saves the chosen funds, fiscal year, etc. as well as the excluded columns. The data will still be refreshed each time you visit the page. Customizations only apply to the current page/tab.

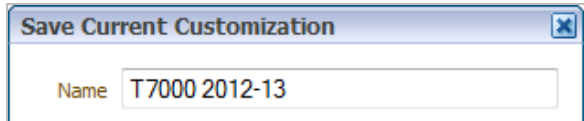
1. Select the Page Options button.



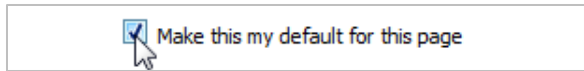
2. Choose Save Current Customization...



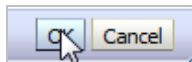
3. Add a name for the customization in the box that appears. The name can be anything that is meaningful to you.



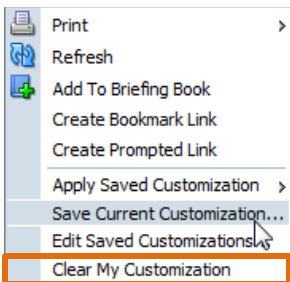
4. Check Make this my default for this page to have this same view appear every time you visit this specific page.



5. Click OK to save this customization.



6. Select Clear My Customization to return to the default layout. This will not delete the saved customization.

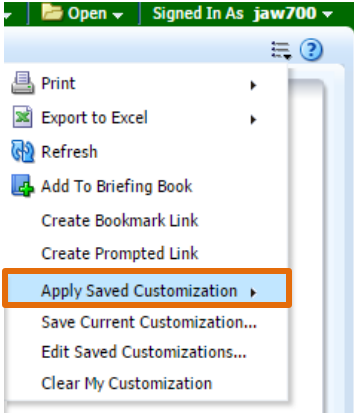


Apply a Saved Customization

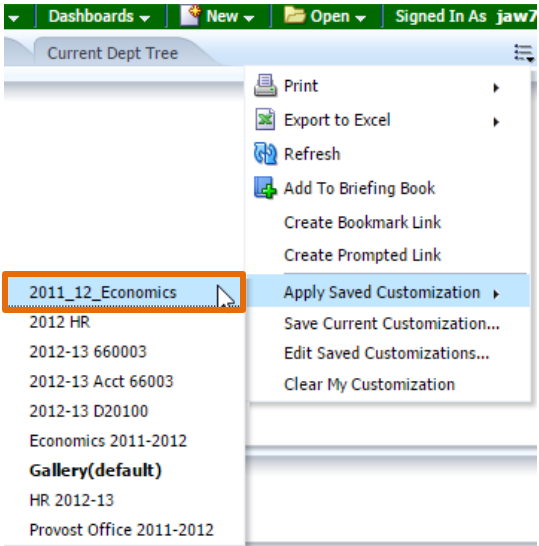
1. Select the Page Options button.



2. Select Apply Saved Customization.



3. Choose the customization you would like to apply.

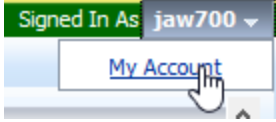


Setting the Starting Page

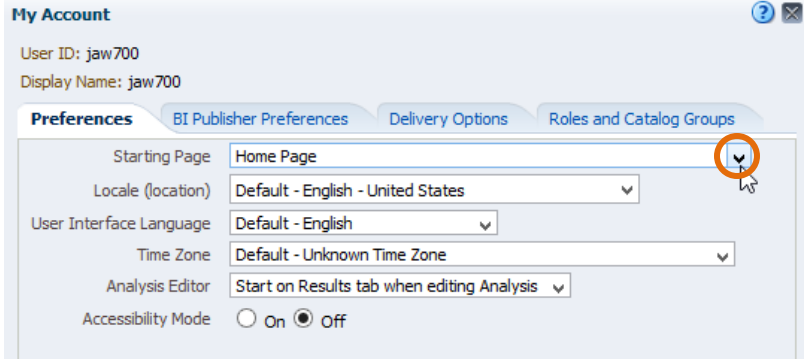
1. Choose your login name on the far right of the OBI menu.



2. Select My Account.



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



4. Select OK.



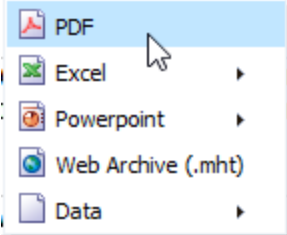
Exporting a Report for Printing

At the center of the bottom of the report, there are Print and Export links.

1. Select Export

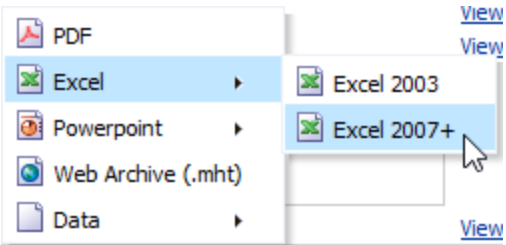
[Print - Export](#)

2. To create PDF file for printing, choose PDF. The file will open in a PDF viewer and can be printed or saved.



3. If you would like to edit the file before printing, choose Excel > Excel 2007+.

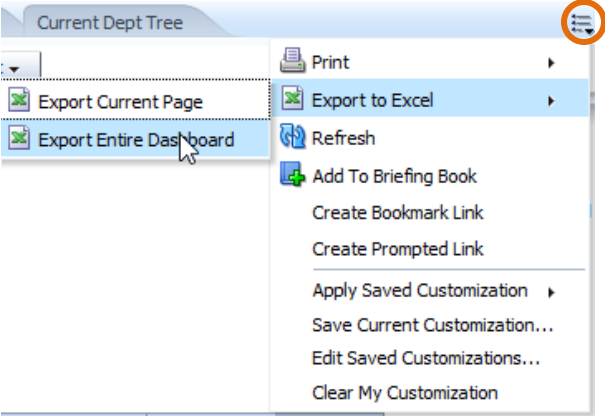
Note: The appearance of the file in Excel will be similar to the appearance online. The Excel 2007+ version is helpful if you would like to exclude columns, modify text, change colors, etc.



4. The file will be downloaded.

Note: Depending on your settings, the file may be downloaded to the Downloads directory.

5. The entire dashboard can be exported to Excel by selecting Page Options > Export to Excel > Export Entire Dashboard.



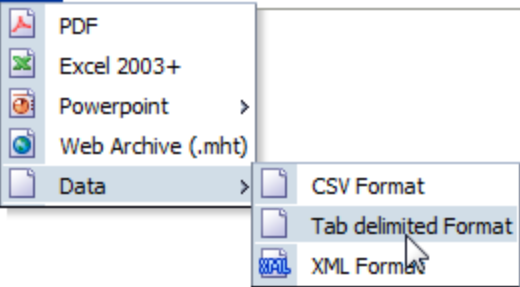
Exporting Data for Analysis

At the center of the bottom of the report, there are Print and Export links. Exporting data using this method produces a spreadsheet with an unformatted block of data, which is useful when creating PivotTables and other types of analyses.

1. Select Export

[Print - Export](#)

2. Choose Data, then Tab Delimited Format.

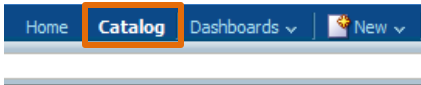


3. The file will be downloaded. Depending on your settings, the file may be downloaded to the Downloads directory.

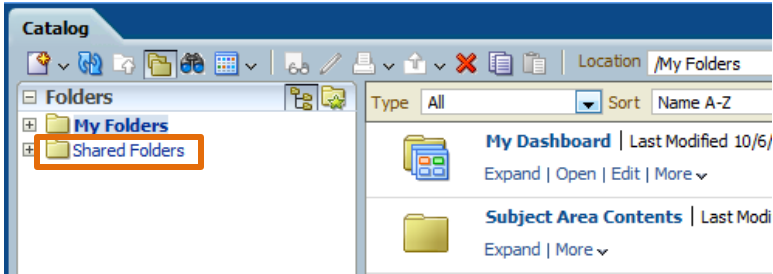
Viewing Data Using the Catalog

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

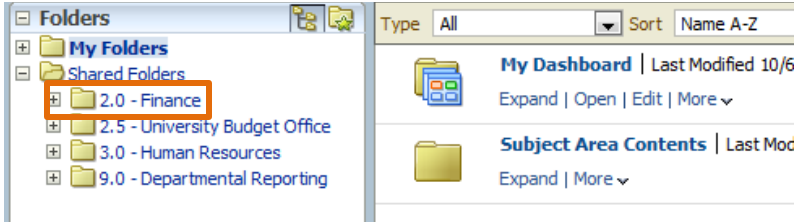
1. Select the Catalog. This view shows all the Dashboards available to you.



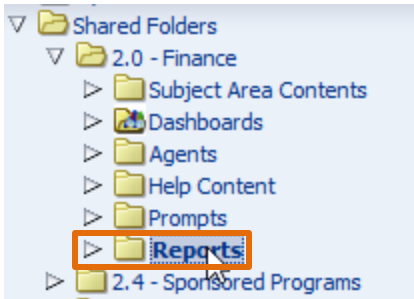
2. Select Shared Folders on the left of the screen.



3. Select the subfolder for the particular subject area.



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



Definitions

Grants

Grants and Contracts are externally funded from Federal, State, Local, and Corporate sponsors. There is usually a task or deliverable to be done and the funder will usually provide a budget that you are expected to stay within. These are considered "restricted" funds.

Trusts

Trusts are usually funded by donations or in some cases program revenue. They are not funded by tax payer dollars. They are considered "unrestricted" funds.

Frequently Asked Questions

Q. How do I verify the parameters of the report?

A. Filters will be displayed at the bottom of the report. The text describes the limits being placed on the data.

Accounting Period is less than or equal to **CURRENT_MONTH**
and Fiscal Year is equal to **2012-2013**
and Fund is equal to **T7000 - STAFF COUNCIL TRUST**
and Fund is between **T7000 - STAFF COUNCIL TRUST** and **T7999 - SMALL BOAT MAINTENANCE**

Q. I don't know the Fund ID. How do I search for the Grant/Trust?

A. For the greatest flexibility, change the matching criteria to Contains and uncheck Match Case. You can then type in the text of the description.

Name Match Case

Q. How do I get detail for prior years?

A. Run the June report for the desired fiscal year and drill on the Year to Date column.

Fiscal Year Accounting Period

Q. Where can I find more information?

A. See the following links:

- <http://www2.humboldt.edu/its/myreports>
- https://training.humboldt.edu/doc_center