Oracle Business Intelligence (OBI) User's Guide
October 2011

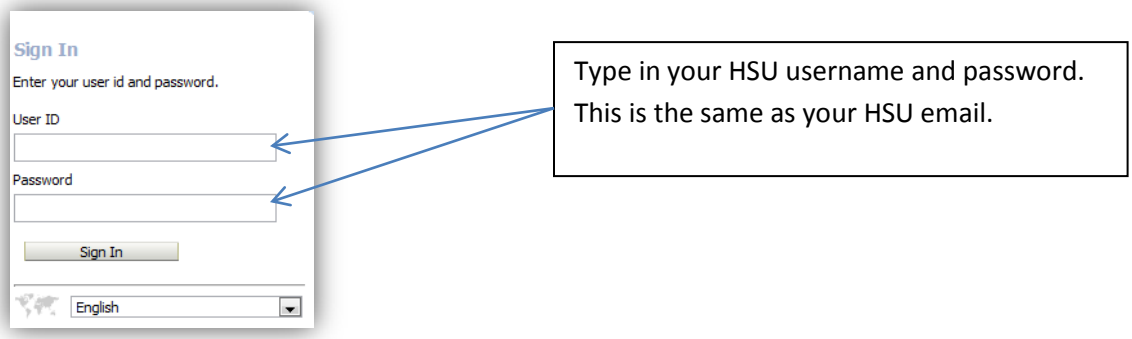
OBI is a web-based reporting tool that enables PeopleSoft users to analyze and report on information stored in the PeopleSoft Finance and Human Resources databases on a one-off or repeating schedule.

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 has been tested to work with Internet Explorer 8/9, Firefox 7.0.1, Safari 5.1.1 and Google Chrome (October 2011). "Mozilla Firefox 3.6 or higher is the preferred browser" per Oracle web site.

Getting Started

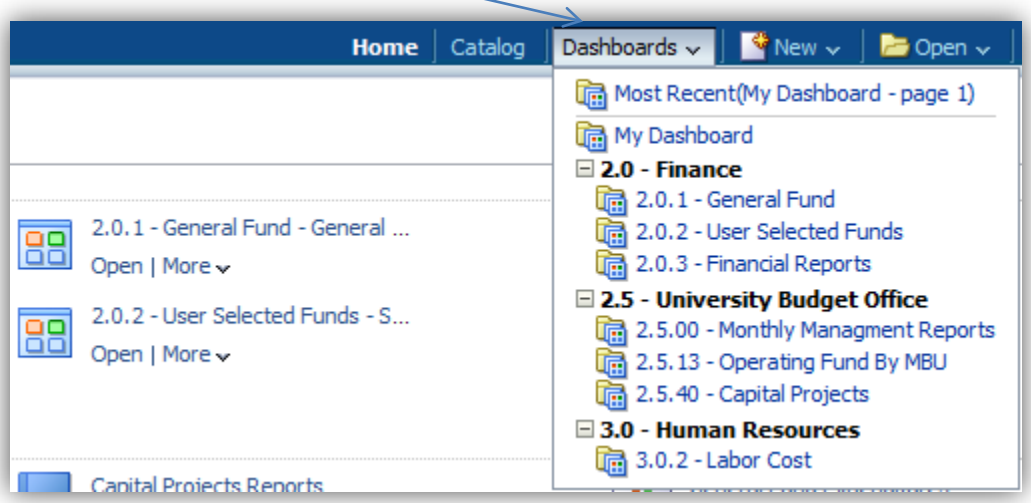
Type obi.humboldt.edu in the Address Bar of your browser to go to the OBI login screen:



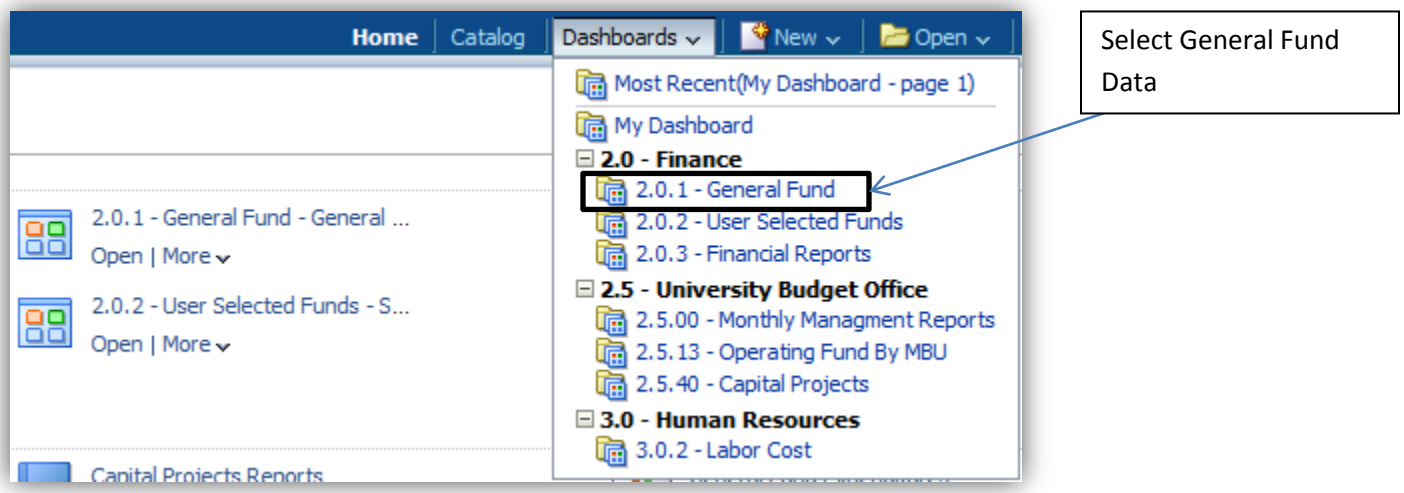
Your screen will look something like this:

Viewing Data via the Dashboards

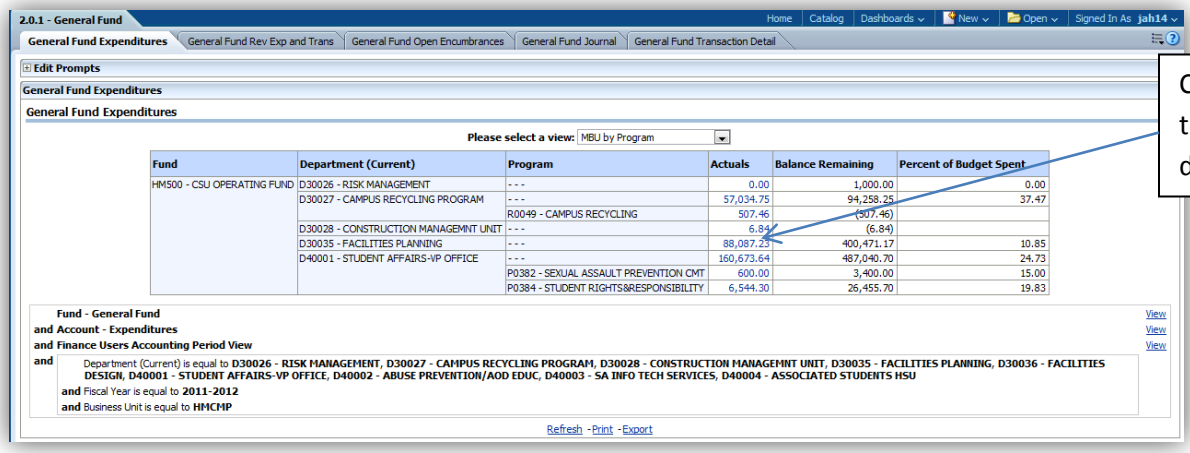
Select Dashboards



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



Notice that some of the numerical data is highlighted in blue. This means that you can drill to view more detailed information about that amount. Click on one of the blue amounts to display the drill-down option(s).

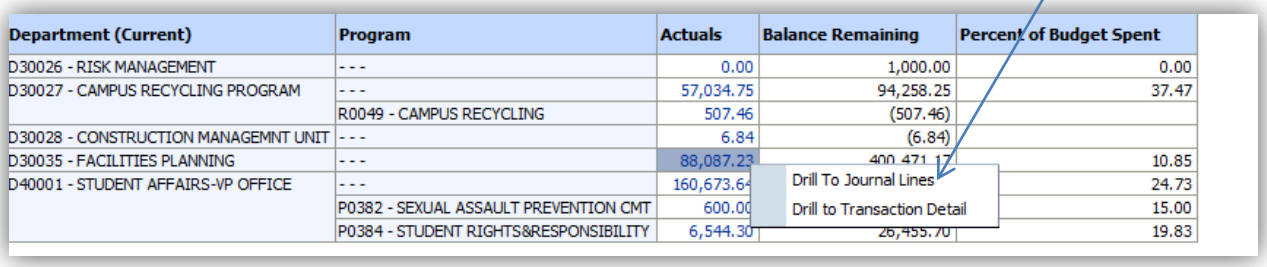


Fund	Department (Current)	Program	Actuals	Balance Remaining	Percent of Budget Spent
HM500 - CSU OPERATING FUND	D30026 - RISK MANAGEMENT	- - -	0.00	1,000.00	0.00
	D30027 - CAMPUS RECYCLING PROGRAM	- - -	57,034.75	94,258.25	37.47
		R0049 - CAMPUS RECYCLING	507.46	(507.46)	
	D30028 - CONSTRUCTION MANAGEMNT UNIT	- - -	6.84	(6.84)	
	D30035 - FACILITIES PLANNING	- - -	88,087.23	400,471.17	10.85
	D40001 - STUDENT AFFAIRS-VP OFFICE	- - -	160,673.64	487,040.70	24.73
		P0382 - SEXUAL ASSAULT PREVENTION CMT	600.00	3,400.00	15.00
		P0384 - STUDENT RIGHTS&RESPONSIBILITY	6,544.30	26,455.70	19.83

Click on a blue total to display the drill down option(s).

Click on Drill to Journal Lines and a new Analysis will pop up with the Journal detail. At this point there are no more blue links, as there is no lower level of data.

Click on Drill to Journal Lines



Department (Current)	Program	Actuals	Balance Remaining	Percent of Budget Spent
D30026 - RISK MANAGEMENT	- - -	0.00	1,000.00	0.00
D30027 - CAMPUS RECYCLING PROGRAM	- - -	57,034.75	94,258.25	37.47
	R0049 - CAMPUS RECYCLING	507.46	(507.46)	
D30028 - CONSTRUCTION MANAGEMNT UNIT	- - -	6.84	(6.84)	
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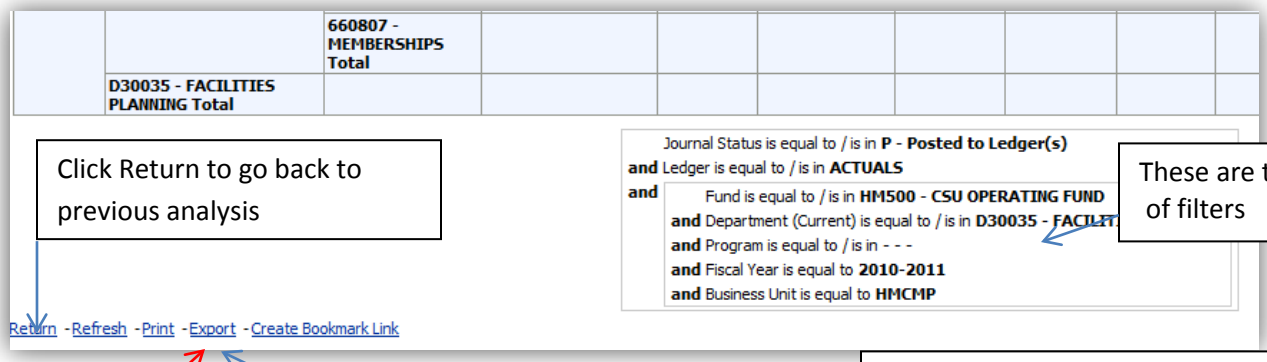
Drill To Journal Lines
Drill to Transaction Detail

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

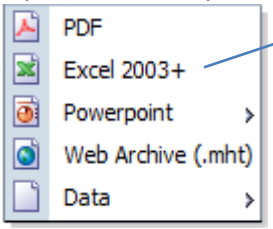


Click Return to go back to previous analysis

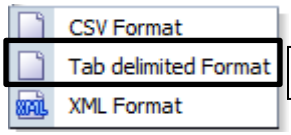
These are the set of filters

TO PRINT: Export to PDF

To export click on export link



When exporting to Excel, only data, NOT formulas, are exported.

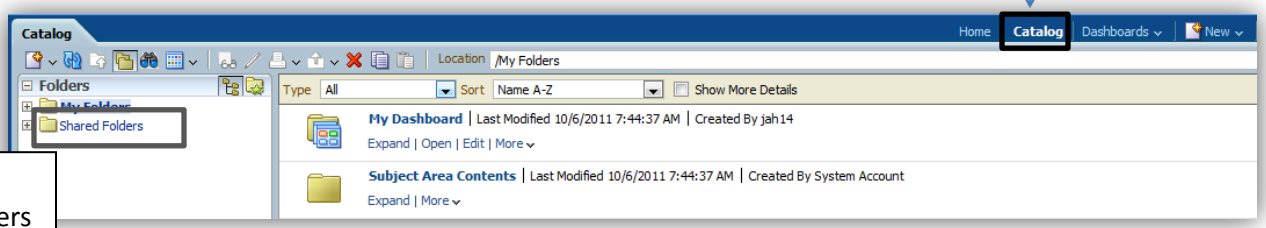


Recommended.

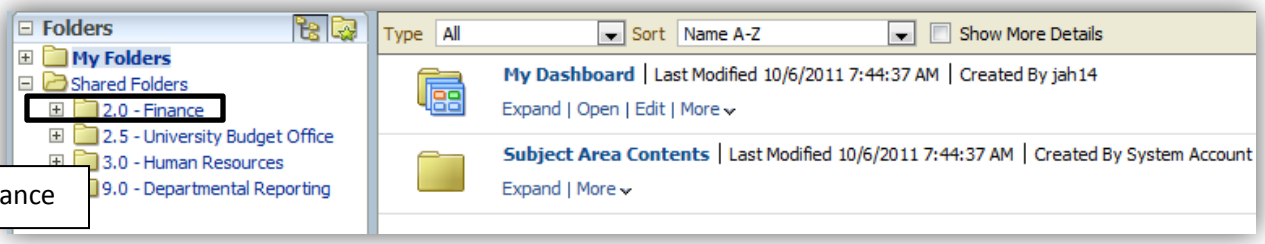
Viewing Data using the Catalog

Click on the Catalog. This view shows all the Dashboards available to you.

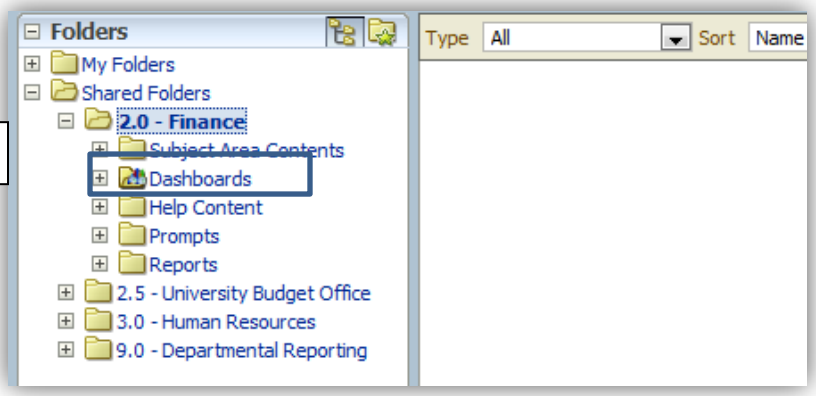
Click on Catalog



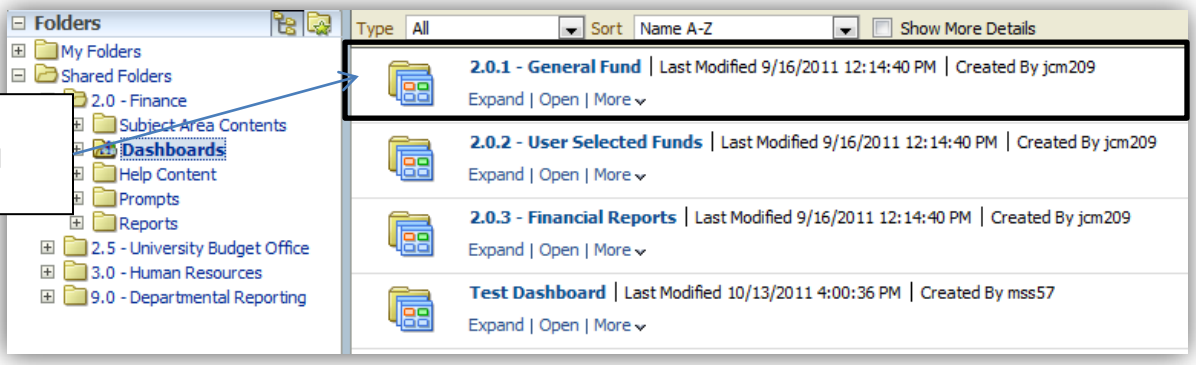
Select Shared Folders



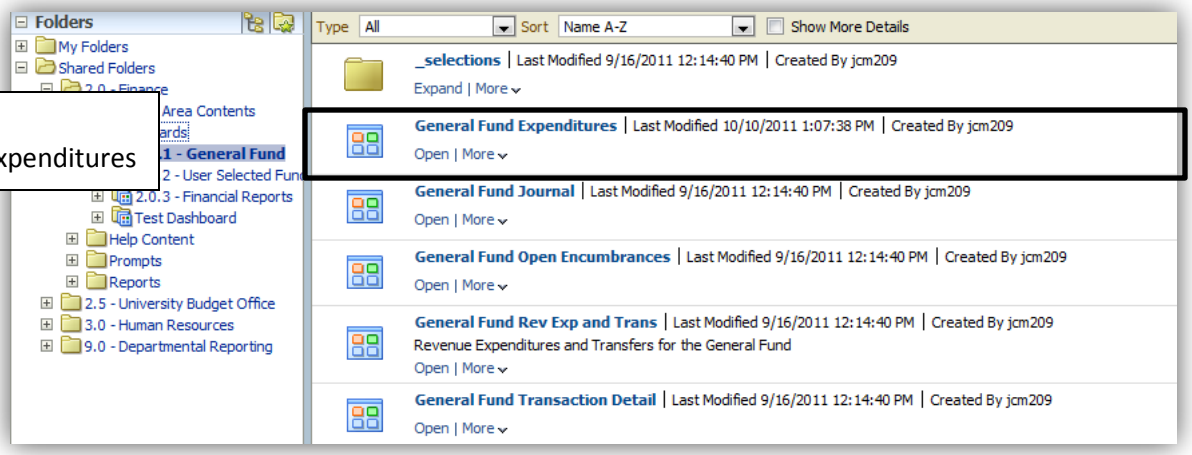
Select Finance



Select Dashboards

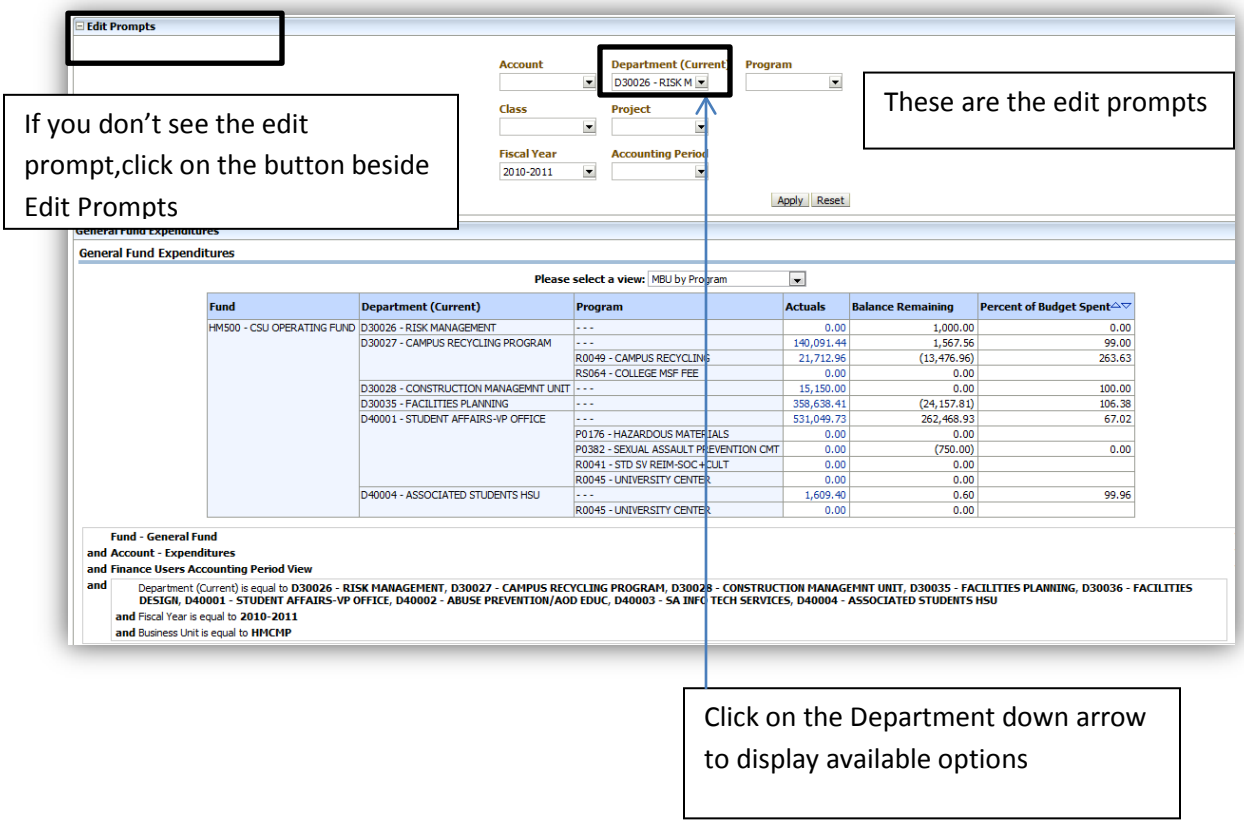


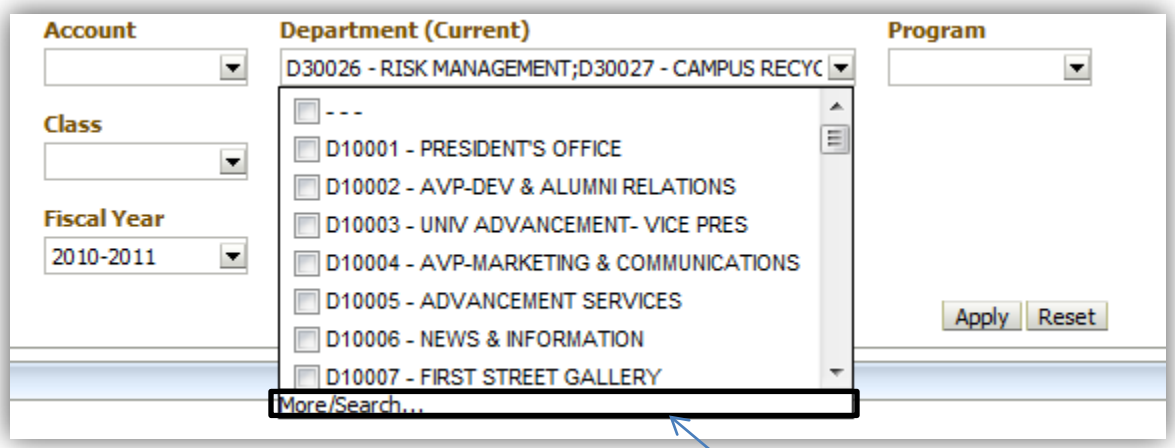
Select 2.0.1 General Fund



Editing Dashboards

To edit the dashboard by changing the department, fund, etc. use the edit prompts.



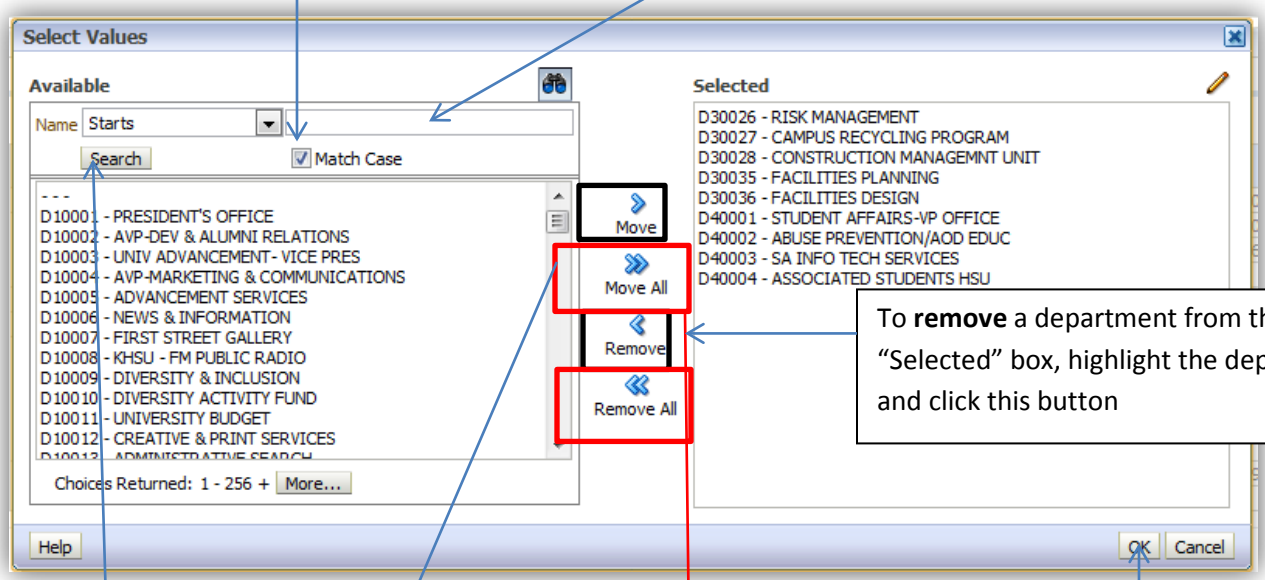


Select More/Search

These are the values you may select.

The default is Match Case. Clicking on the checkmark removes that feature.

To search for your department, enter the first few characters of the name or Dept ID



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

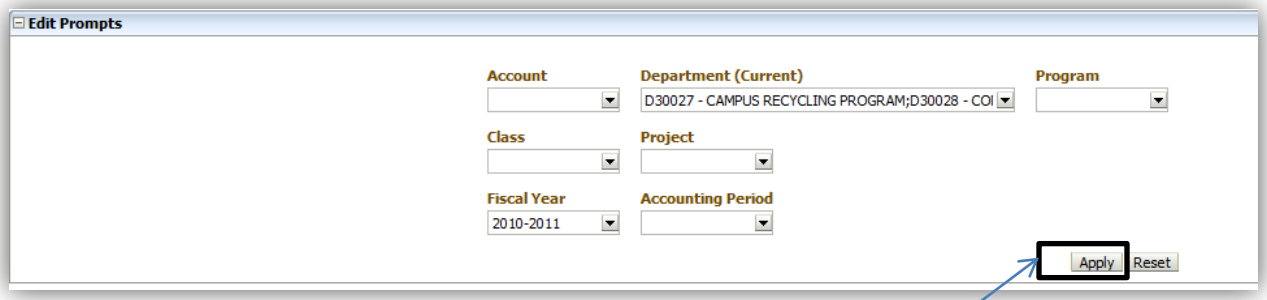
Click ok

Be sure to click Search to get the results

By highlighting your department and selecting the MOVE button, your department will move over to the right "Selected" portion of the screen.

The double arrows (Move all and Remove all) affect all items in the displayed list, regardless of what is highlighted. Do not use these commands unless you really want to move or remove all entries.

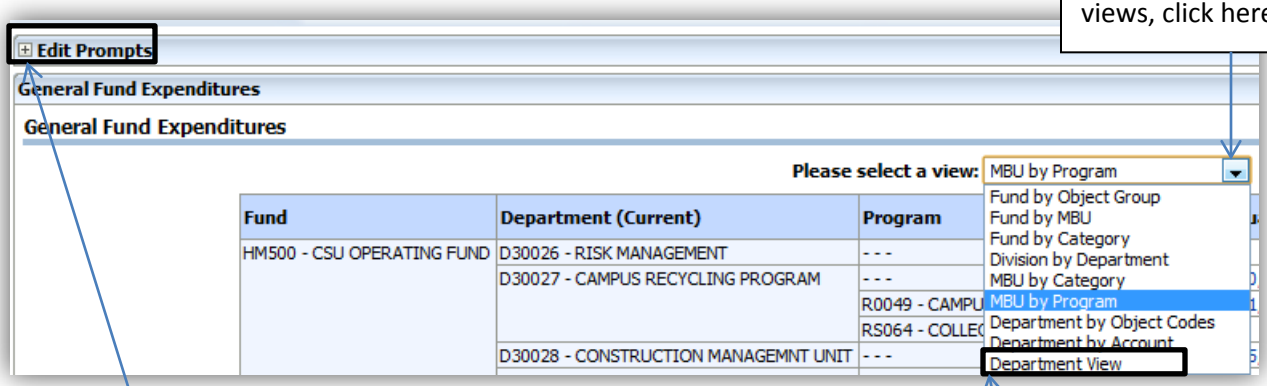
After you click Ok, your screen will look similar to this.



Click the Apply button and see the Analysis update to use the information you selected

Many different views are available for each Analysis.

For a complete list of views, click here



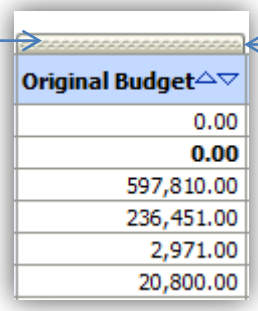
Click here to remove the edit prompts to better see your analysis

For this exercise, select Department by Account.

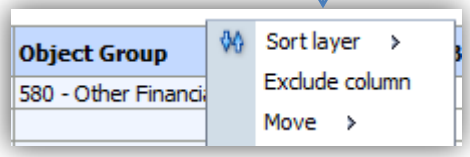
Changing the way the data is displayed.

By hovering over the Column titles with your mouse, you have the ability to move , remove or sort columns.

By placing your mouse in the grey area, you are able to move (drag) the column to the location you would like it to appear. All data will be sorted by the columns from left to right.



By right clicking on the grey area, you will see the following prompts

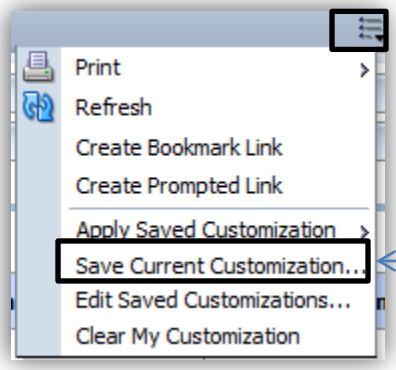


You may move a column this way, as well using the dragging method listed above. You may sort the data either by using the blue arrows next to the column name or by using the drop down menu shown above. NOTE: If you Exclude a Column by mistake, you'll have to start over by going to a new Dashboard.

Ways to "Save" and Share

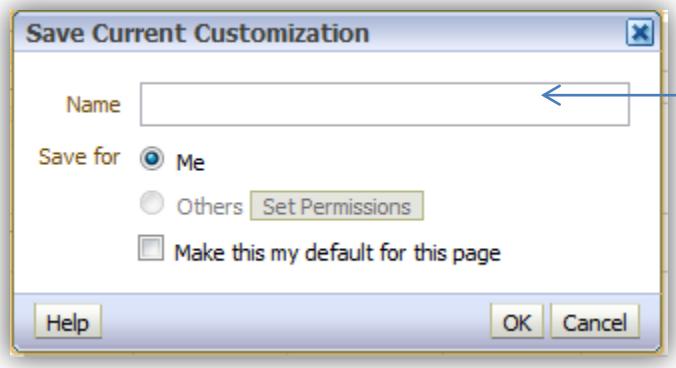
Creating a Customization

Once you have applied all the prompts and modifications to your Analysis, you can Save A Customization



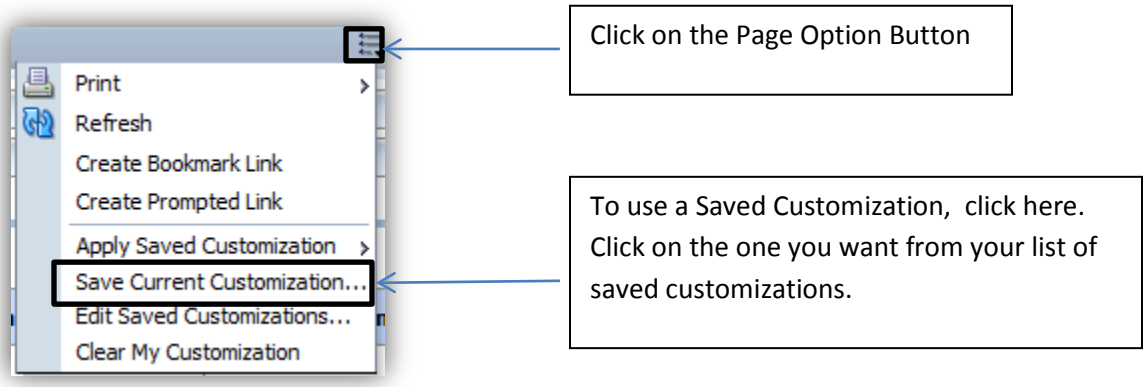
This is the Page Option button. It is located at the top right of your screen next to the ? (Help) button. Click here

Click on Save Current Customizations



Enter a title for your Customization. It is suggested you include the relevant Fiscal Year in the title for ease of identification in the future.

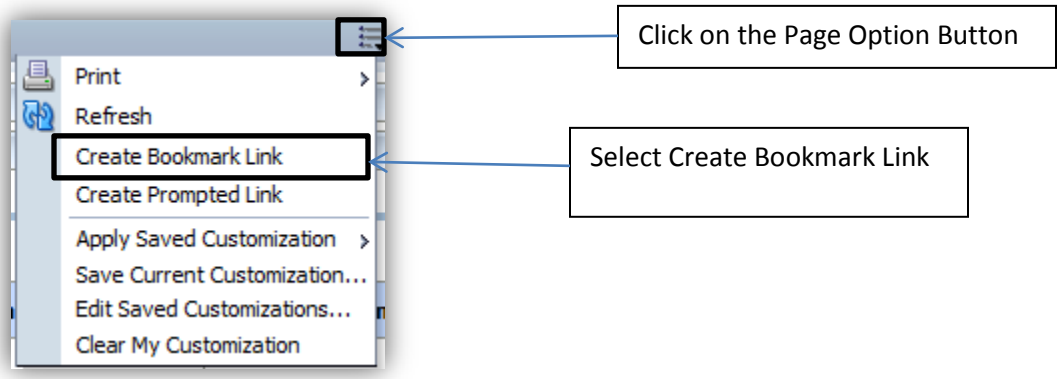
To use a Saved Customization :



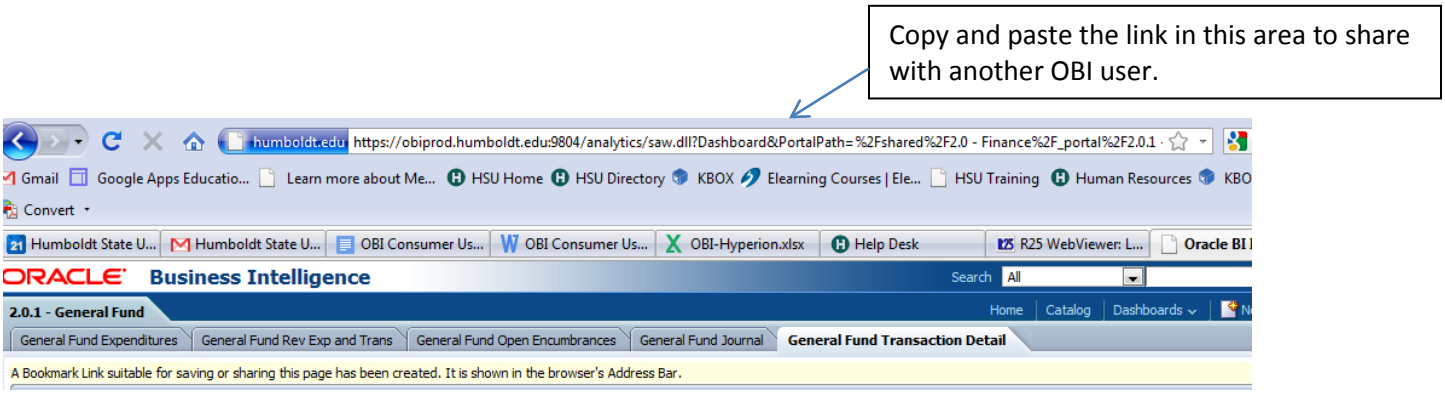
NOTE: Saved customizations can be accessed from any computer. The customizations stays with your account.

Creating a Bookmark Link

Once you have applied all the prompts and modifications to your Analysis, you can create a Bookmark. Hover over the Page Options button (at the upper right of your screen) and click on the Create Bookmark Link option.



When the Bookmark Link has been created, a yellow bar will appear at the top of the Analysis.



You can now save this Analysis as a bookmark in your browser. Give it a meaningful name, including the Fiscal Year – for example GL Geology 11-12, with 11-12 being the Fiscal Year. To **share** Analysis with other OBI users, simply copy this link into an email and send it.