OBIEE

Oracle Business Intelligence

Enterprise Edition

Rensselaer Business Intelligence

Position Control

TABLE OF CONTENTS

INTRODUCTION

Oracle Business Intelligence Enterprise Edition (OBIEE) is a web-based Business Intelligence tool that provides a full range of reporting and analytics capabilities that allow you to:

- *Collect up-to-date data from your organization*
- *Present the data in easy-to-understand formats*
- *Deliver data in a timely fashion*

These capabilities enable better decisions, informed actions, and the ability to implement more-efficient business processes.

USER INTERFACE

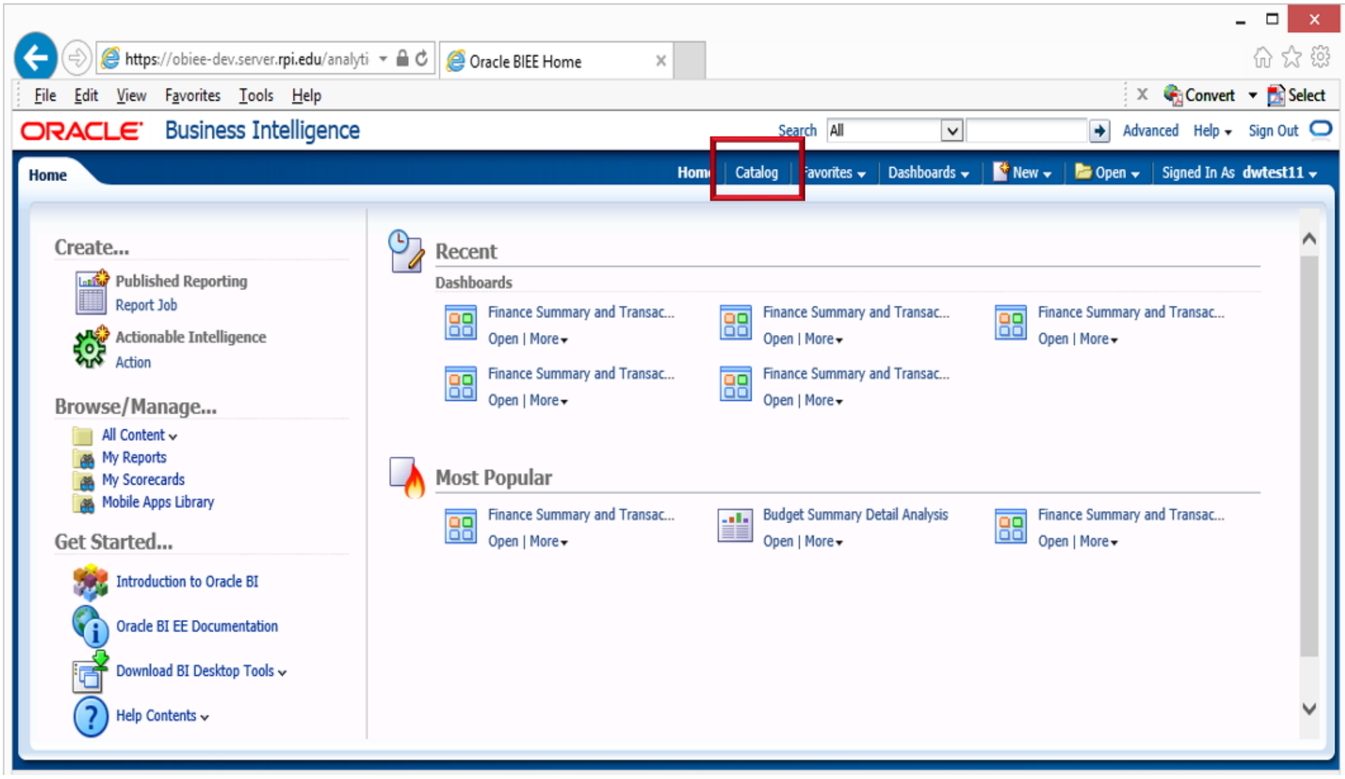
- Web-based application
- Works from all browsers (IE, Chrome, Firefox, Safari)
- Allow pop-ups from rpi.edu (see Browser Settings section for more information)

HOW TO LAUNCH OBIEE

- Web Application (no installation or special setup required)
- URL: https://obiee.server.rpi.edu/analytics/
- Sign In (RCS User ID and RCS password)

HOW TO NAVIGATE

- Will open to this page, select Catalog



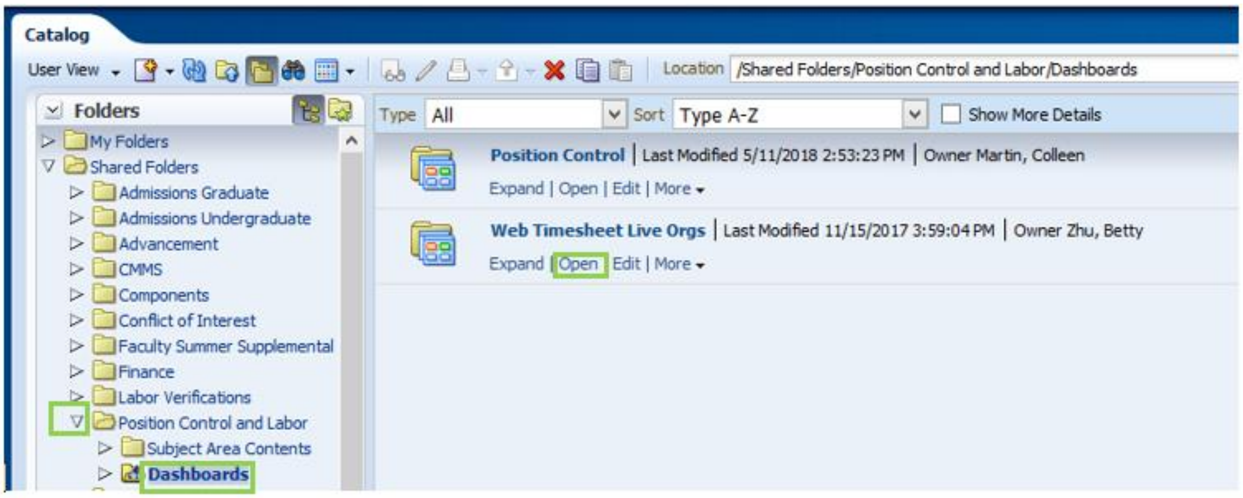
SUBJECT AREAS

- Finance
- Advancement
- Research
- Position Control
- Admissions

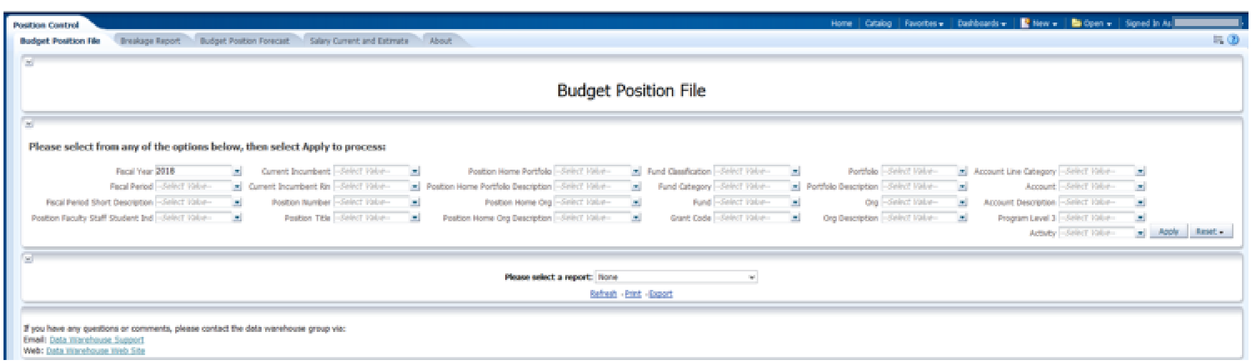
POSITION CONTROL SUBJECT AREA

Dashboard: Position Control

- From Folders, open Shared folders, then open Position Control and Labor folders
- Select the Dashboards folder, then select Open under Position Control
- Purpose: to show a variety of salary and position control reports
- Subject Area: Position Control

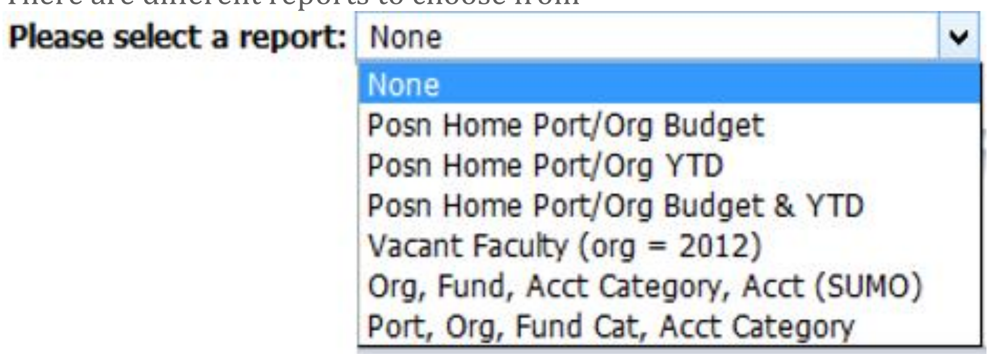


- The dashboard will open as:

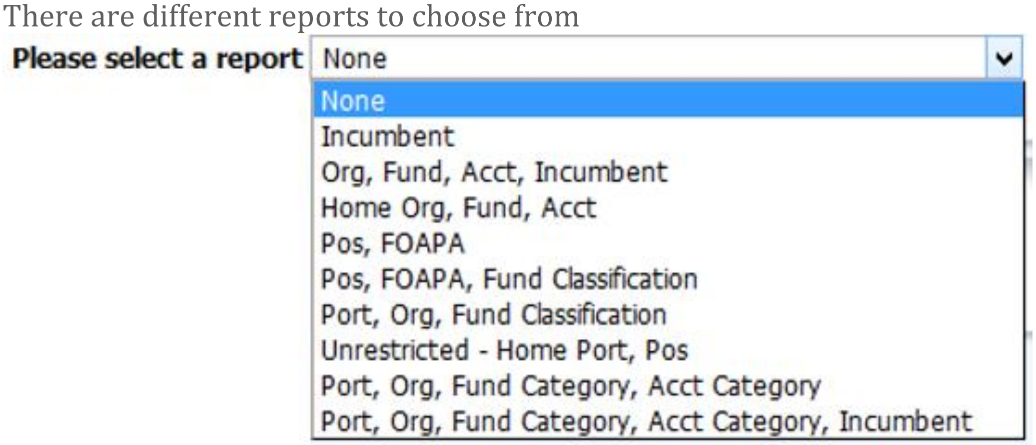


- Tab: Budget Position File
    - Subject Area: Position Control Labor Monthly Summary
    - Purpose:
        - To show labor budget, expenditures, and estimated future expenditures
        - Includes fund Category reports
    - Default Filters:
        - Position Faculty Staff Student Ind is not = “Student”
        - Fund Category = Auxiliary, Designated, Education & General, Gift, Restricted Endowment Income, Sponsored and Unexpended Plant Funds

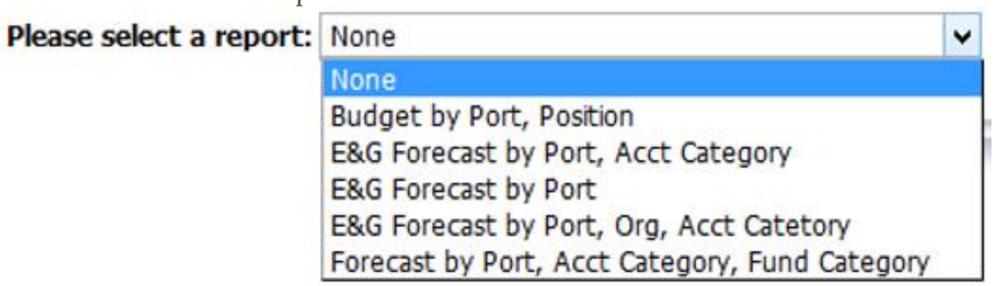
    There are different reports to choose from



- Tab: Breakage Report
    - Subject Area: Position Control Labor Monthly Summary
    - Purpose: To show labor budget, expenditures, estimated future expenditures, and breakage calculation (Breakage = Labor Budget – Expenditures – Estimated Future Expenditures)
    - There are different reports to choose from

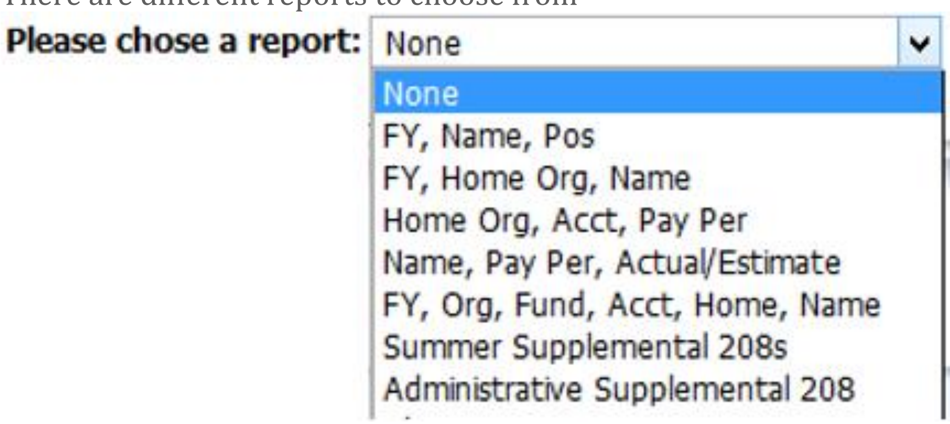


- Tab: Budget Position Forecast
    - Subject Area: Position Control Labor Monthly Summary
    - Purpose:
        - To show labor budget and forecast by Portfolio, Position Title and Fund Category
        - To show E&G forecast reports by Portfolio and Account Line Category
    - Default Filters:
        - Position Faculty Staff Student Ind is not = "Student"
        - Fund Category = Auxiliary, Designated, Education & General, Gift, Restricted Endowment Income, Sponsored and Unexpended Plant Funds
    - There are different reports to choose from



- Tab: Salary Current and Estimate
    - Subject Area: Position Control Payroll Details
    - Purpose:
        - To show Actual payroll expenditures by person
        - To show Actual and estimated payroll expenditures by person
        - To Show Actual and estimated payroll expenditures by person and pay period

    There are different reports to choose from



- About Tab:

Budget Position File | Breakage Report | Budget Position Forecast | Salary Current and Estimate | **About**

Position Control Reports

Tab: Budget Position File

- Subject Area: Position Control Labor Monthly Summary
- Default Filters:
  - Position Faculty Staff Student Ind is not = "Student"
  - Fund Category = Auxiliary, Designated, Education & General, Gift, Restricted Endowment Income, Sponsored and Unexpended Plant Funds
- Purpose:
  - To show labor budget, expenditures, and estimated future expenditures
  - Includes Fund Category reports

Tab: Breakage Report

- Subject Area: Position Control Labor Monthly Summary
- Purpose: To show labor budget, expenditures, estimated future expenditures, and breakage calculation (Breakage = Labor Budget – Expenditures – Estimated Future Expenditures)

Tab: Budget Position Forecast

- Subject Area: Position Control Labor Monthly Summary
- Default Filters:
  - Position Faculty Staff Student Ind is not = "Student"
  - Fund Category = Auxiliary, Designated, Education & General, Gift, Restricted Endowment Income, Sponsored and Unexpended Plant Funds
- Purpose:
  - To show labor budget and forecast, by Portfolio, Position Title, and Fund Category
  - To show E&G forecast reports by Portfolio and Account Line Category

Tab: Salary Current and Estimate

- Subject Area: Position Control Labor Payroll Details
- Purpose:
  - To show Actual payroll expenditures by person
  - To show Actual and estimated payroll expenditures by person
  - To Show Actual and estimated payroll expenditures by person and pay period

To Process:

1. Select Prompts if data is to be limited, then select the Apply button
   a. By Default, Fiscal Year = current fiscal year
      i. This may be changed as needed
   b. Select from the drop-down list or
   c. Type directly into the prompt box
      i. A semicolon ";" (without spaces) should be used for multiple selections in a prompt or
   d. Select search which will launch a new search box to search for a specific value
2. Select a report from the drop down list
3. To see all data, do not specify anything in the prompts, leave all blank
4. Prompt differentiation:
   a. Portfolio and Org: will return results for transactions posted specifically in that Portfolio or Org
   b. Position Home Portfolio and Position Home Org: will return all transaction results for a position regardless of the actual org that the transaction posted to

Additionally:

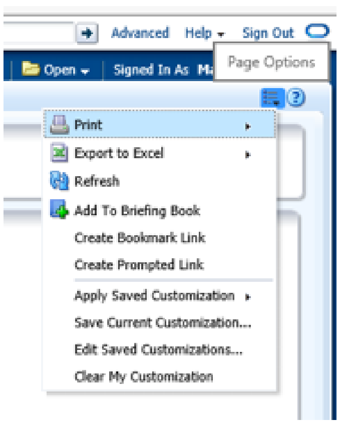
- All Reports selected will show up under the Report and Prompt selection section
- The bottom of each report will have options to print or export
- By default, reports with more than 25 rows will only show the first 25 rows. When there are more rows available, at the bottom of the report will be a double arrow, just select the double arrow to show all rows.

TOOLS AND MENUS

Prompts (drop down lists)

- Select one or more values from the drop-down list or
- Type directly into the drop-down box or
- Search for something specific (at the bottom of the drop down list is a search box)
- Select Apply (this will process the report based on what you selected in the prompts)

Page Options



Print and Export

- Dashboard (will print or export entire dashboard, all pages)
- Page (will print or export the current page you are on)
- Report (will print or export only the report section you have selected)
- Print
  - Printable PDF
  - Printable HTML (includes more options for resizing, headers and footers)
- Export
  - PDF
  - Excel 2007+ (formatted data, totals are static)
  - PowerPoint 2007+
  - Web Archive (.mht)
  - Data
    - CSV Format (raw, unformatted data, no totals)
    - Tab delimited Format
    - XML Format

Rows Visible (how to view all rows of data)

- By default, only a certain number of rows will be visible. If there are additional rows available, you will see the arrows below. Select the double arrow to view the next 500 rows of data.

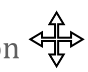
Drill to Detail

- If a field in a report is blue, there is additional detail available. Click on the field and a new browser window will open.

Add Column

- Right click on a column name, select Include Column, then select from the available columns

Move Column

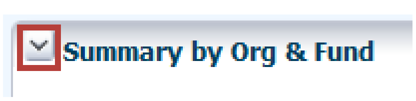
- Hover cursor over a column name until you see the double arrow cross icon 
- Then left click to select and drag column below the column name until you see a highlighted area where you want to drag it to
- Or, right click and select Move Column, then select Left or Right

Remove Column

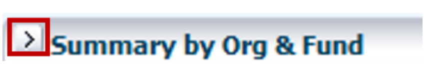
- Right click on a column name, select Exclude Column

Hide/Unhide Sections

- Select the down arrow at the top left of the section to hide

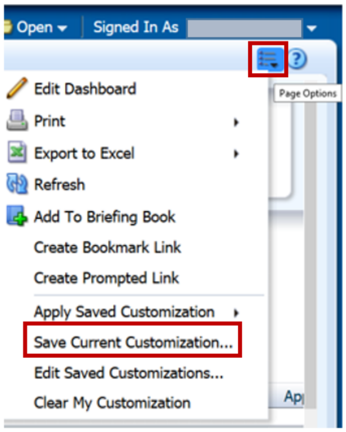


- Select the right arrow at the top left of the section to unhide

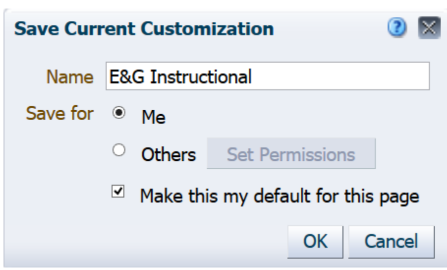


Save Current Customization

- From the Page Options menu (upper right), select “Save Current Customizations…”

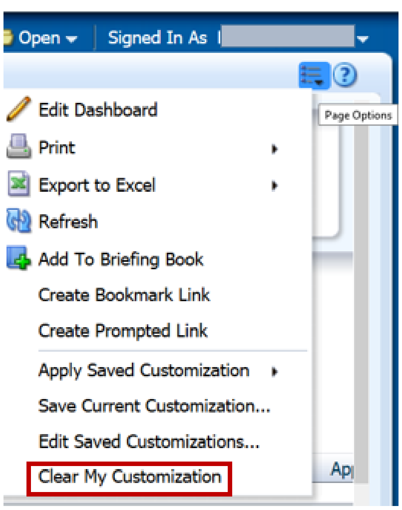


- Then add a meaningful name
- To apply this customization to this dashboard each time you open it, select “Make this my default for this page”



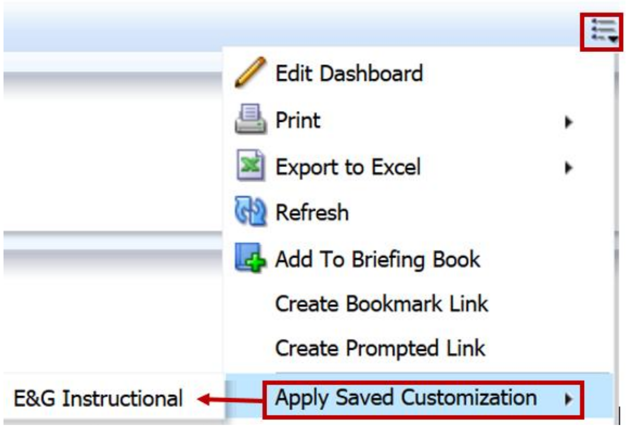
Clear Customization

- From the Page Options menu (upper right), select “Clear My Customization”



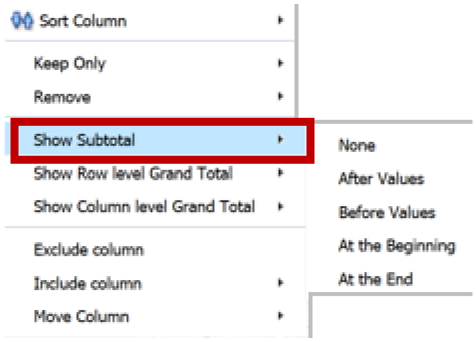
Open Custom report

- To view reports that have been saved as customizations
- The newly created customization, plus any others you have available to you, will now be accessible from the Page Options menu
- Select "Apply Saved Customization" and select customization from the list



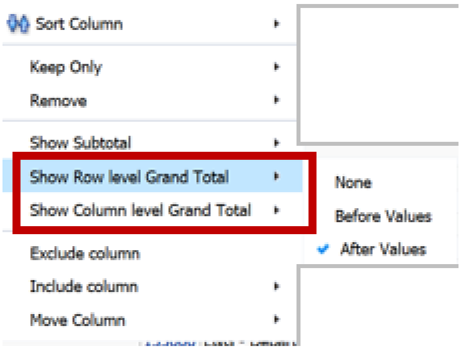
Subtotal

- Right click on a column name, select "Show Subtotal", then select location

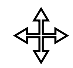


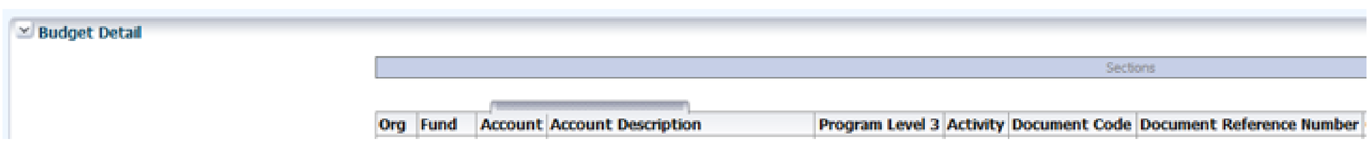
Grand Total

- Right click on a column name, select "Show Row level Grand Total", or "Show Column level Grand Total", then select location



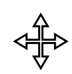
Add Pivot Table Section

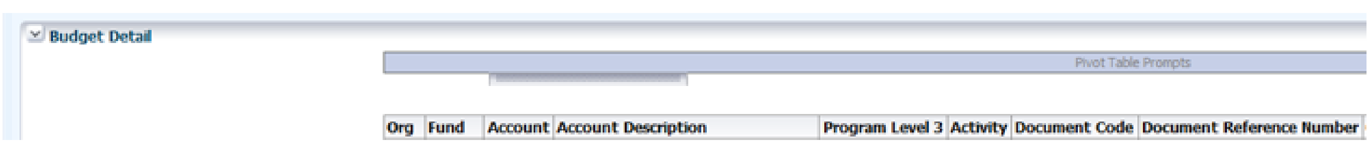
- Hover cursor over a column name until you see the double arrow cross icon 
- Then left click to select and drag column above the column name until you see a highlighted area named "Sections"
    - This will move the column above the report



- Or, right click and select Move Column, To Sections

Add Pivot Table Prompt

- Hover cursor over a column name until you see the double arrow cross icon 
- Then left click to select and drag column above the column name until you see a highlighted area named "Pivot Table Prompts"
    - This will move the column above the report as a prompt (drop-down list)

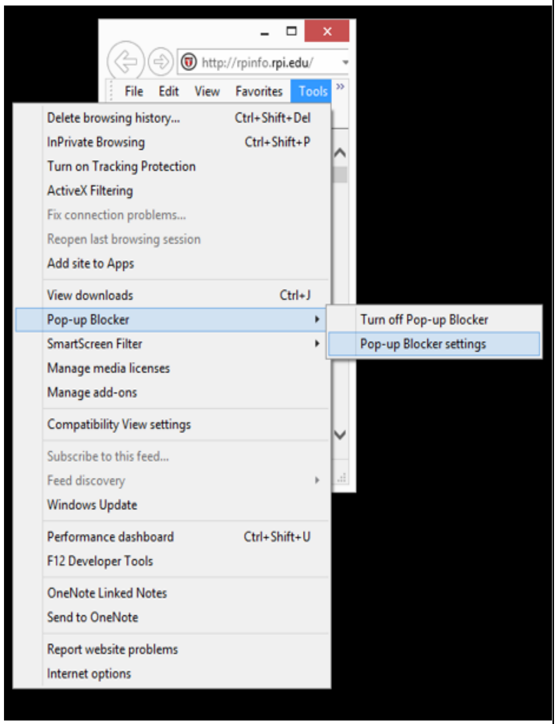


- Or, right click and select Move Column, To Prompts

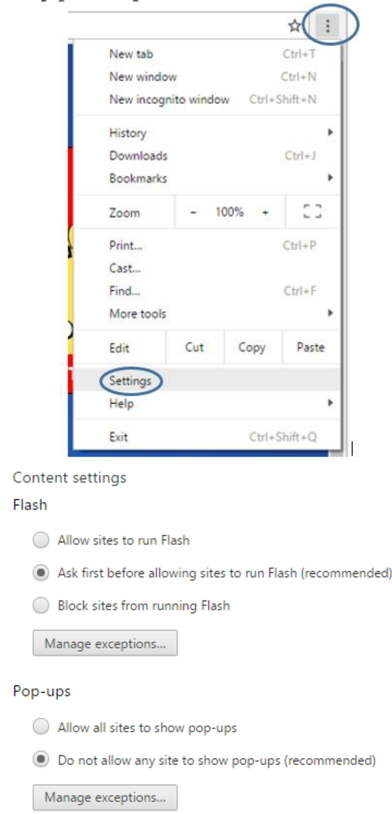
Browser Settings

Pop-Up Blocker

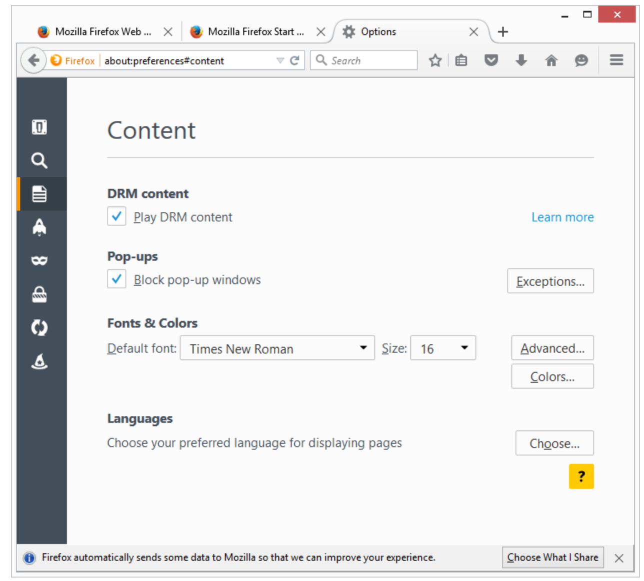
<table>
<tr><th>Internet Explorer</th><th>Chrome</th><th>Mozilla Firefox</th></tr>
<tr>
<td>From the Tools Menu, hover over the Pop-up Blocker item, and select “Pop-up Blocker settings” option in the fly-out menu. Add *.rpi.edu to the list of Allowed sites



</td>
<td>Settings, select “show advanced settings…” at the bottom, under Privacy select content settings, under Pop-ups select manage exceptions, type *.rpi.edu, select Allow



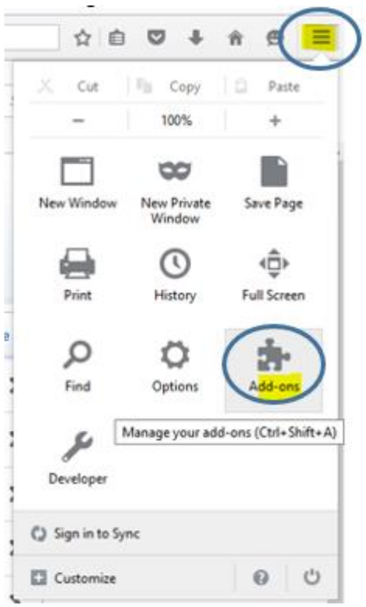
</td>
<td>Options, content, exceptions, add https://obiee.server.rpi.edu



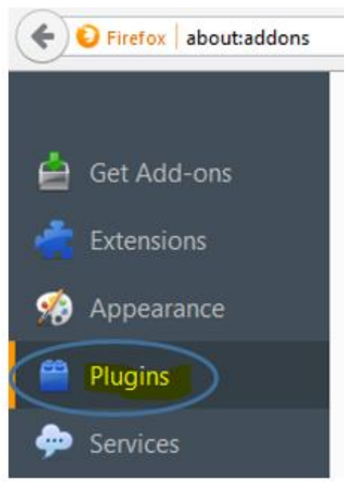
</td>
</tr>
</table>

Mozilla Firefox: Adobe Flash (Shockwave Flash) must be enabled (to view graphics like charts)

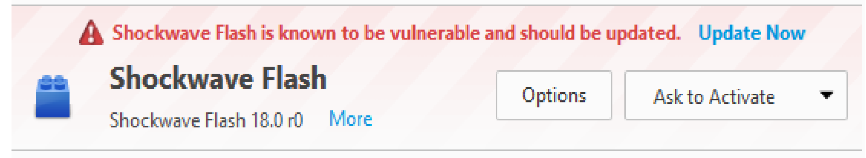
1. Top Right of screen, will open menu of options. Select “Add-ons”.



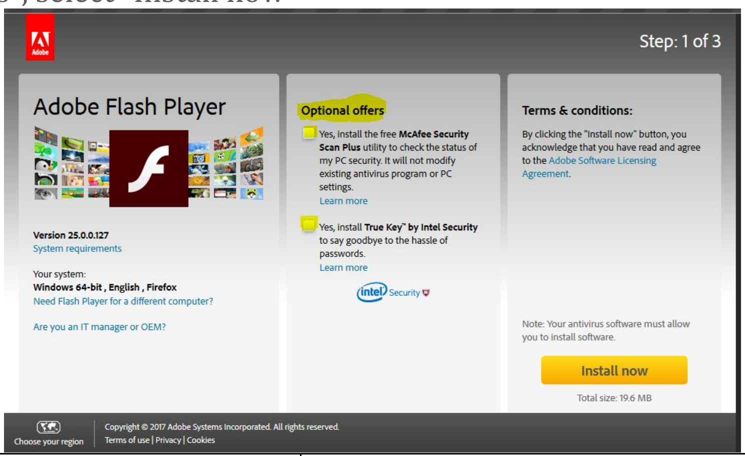
2. From top left, select Plugins



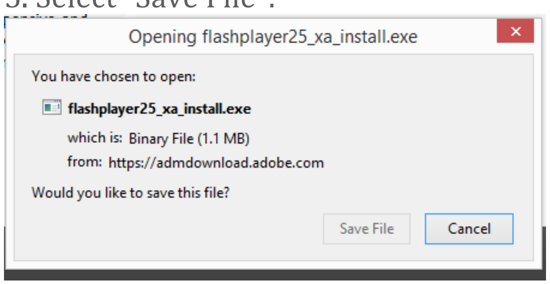
3. Select “Update Now”:



4. Recommend, do not leave boxes checked under “Optional offers”, select “Install now”

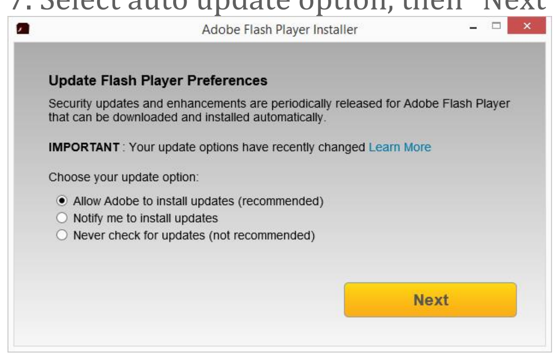


5. Select “Save File”:



6. It will ask do you want to install, answer yes

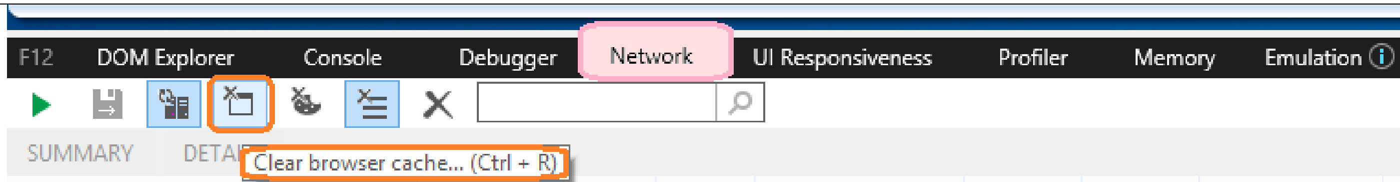
7. Select auto update option, then “Next”



8. Select “Finish” and restart browser

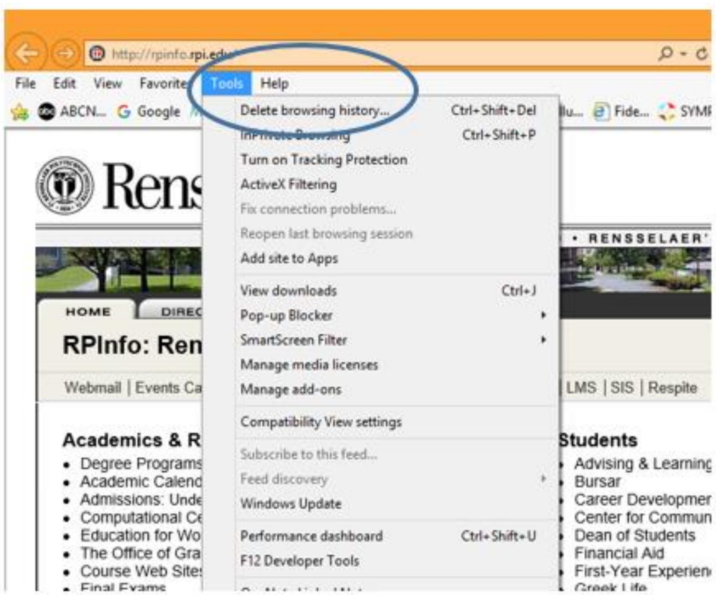
Internet Explorer, Clear Cache
(If menu in isn't visible or there is no content, in IE, the cache may need to be cleared)

1. *Hit F12 (on your keyboard) to display developer tools (or from the menu bar, select Tools, then F12 Developer Tools*
2. *Select the "Network" tab*
3. *Click the "Clear Browser Cache" button (4th from the left)*
4. *Restart browser*

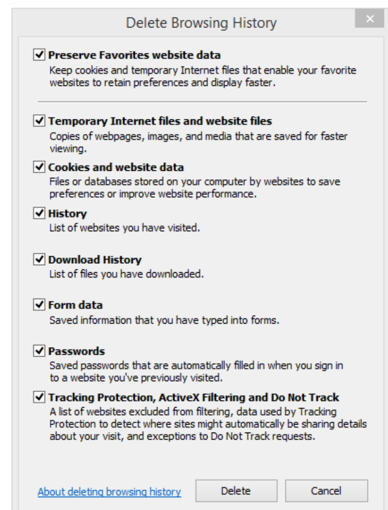


and / or

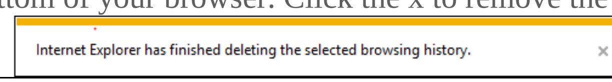
Under Tools, Delete browsing history…



Check all of the boxes in the Delete Browsing History window
Click **Delete** on the bottom of the window



You will eventually after a short period of time, depending on your personal amount of history since the last cache clear, see a pop-up on the bottom of your browser. Click the x to remove the pop-up.



CONTACT INFORMATION

If you have any questions or comments,

please E-mail the data warehouse group:

Email: Data Warehouse Support

iacs-dw-sup@lists.rpi.edu

NOTES