

Oracle Business Intelligence Enterprise Edition (OBI/OBIEE)

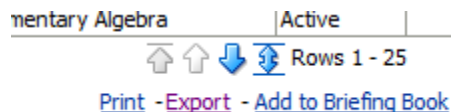
CHEAT SHEET

Help:



On the right hand side of the report screen you may find a ? icon. Clicking on this icon will bring up a how-to guide for how to use the OBI system.

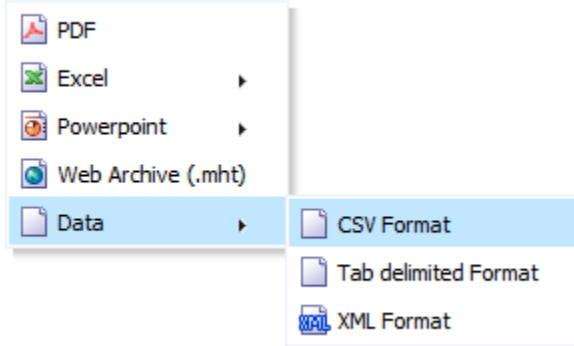
Exporting Data:



At the bottom of each report is a **Print – Export – Add to Briefing Book** link.

Choosing the **Export** option will give you several formats in which to export the report data.

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

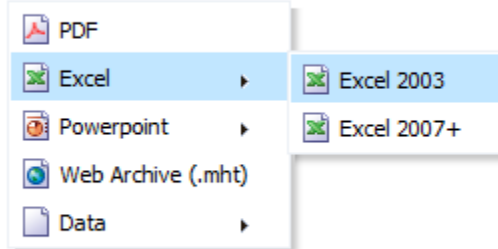


Choosing the **Data** menu from the **Export** drop down will give you the options for an export of the RAW (no formatting) data.

HINT: CSV is the most popular choice and is ideal for data manipulation with Excel

Tab Delimited and XML options are to be only used if directed.

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

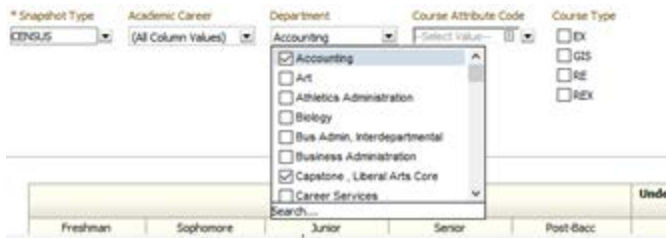


Choosing the **Excel** menu from the **Export** drop down will give you options for an export of the report into Excel.

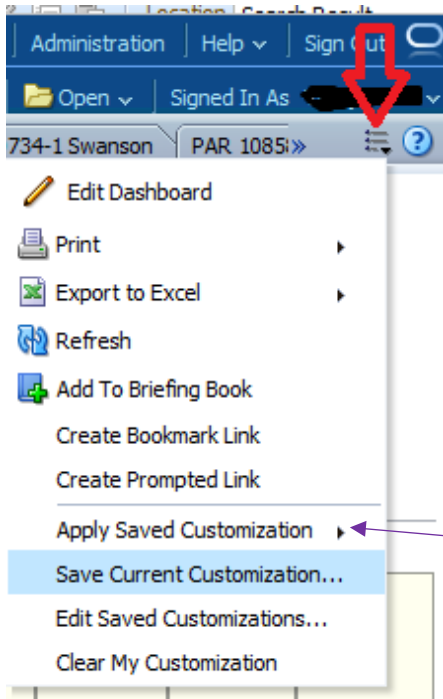
HINT: This is the report as shown (all formatting, cell merging, etc. will be retained). This format is ideal when formatting needs to be retained for display purposes (such as a presentation). This should **NOT** be used for data manipulation.

Customizing OBI:

Most dashboards contain prompts wherein the user can choose specific sorts and filters for a report. Once the user has chosen customizations, they can save those choices so the report will have them applied the next time it is accessed.



Choose the applicable options from the report prompts.

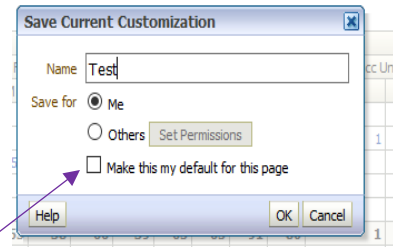


In the upper right hand corner of the application click on the “Page Options” menu.

Choosing the “Save Current Customization” will save the current values.

You will need to save a name for the customization.

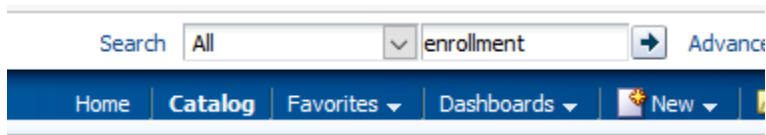
Clicking the “Make this my default for this page” will make those options your default for the report.



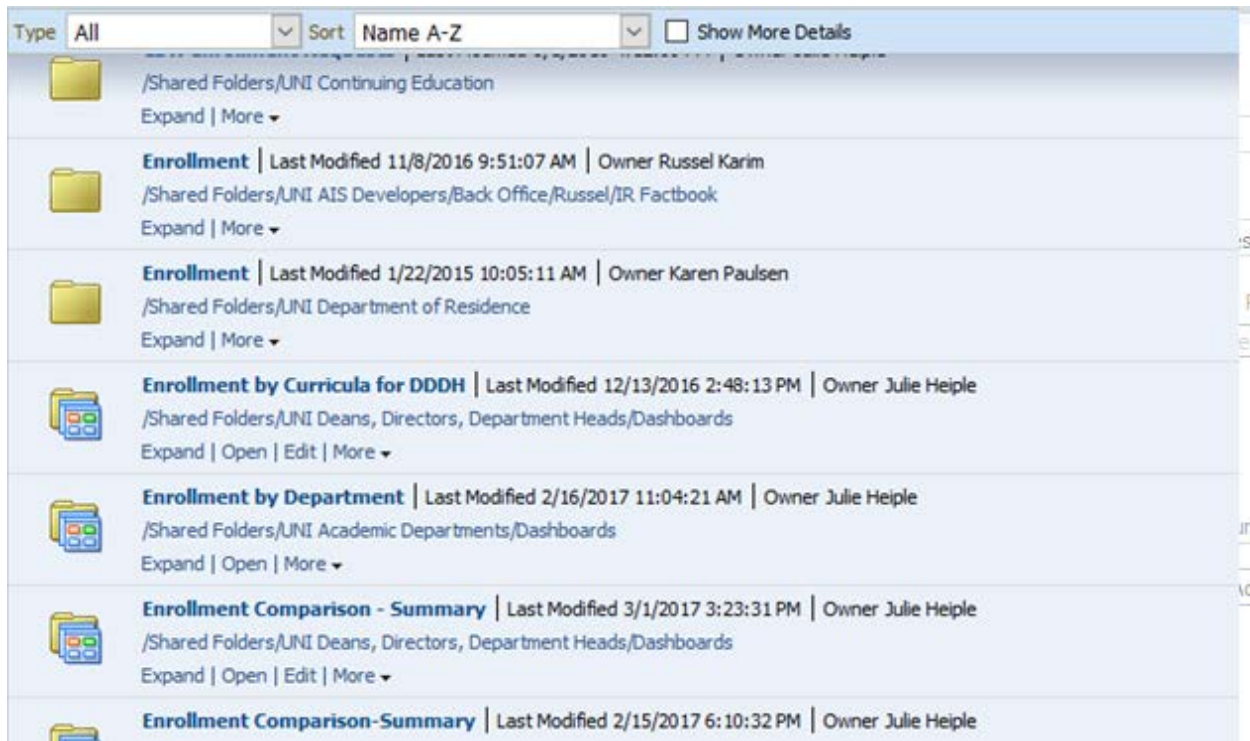
HINT: You can save several variations of the report values, and apply specific combinations via the “Apply Saved Customization” menu.

Searching:

The OBI search functionality will allow you to find reports quickly and easily with a limited amount of information.



For example: Entering the word “**enrollment**” into the search box will return all reports that have that in their description.



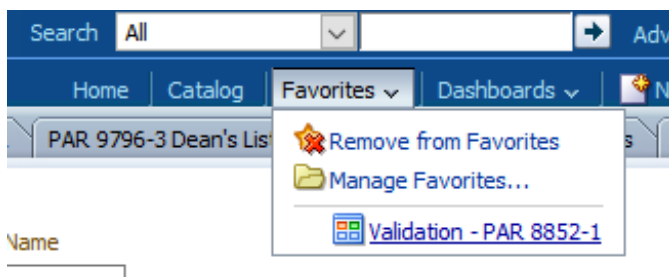
Dashboard



Folder

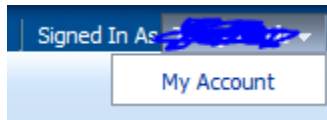


Report

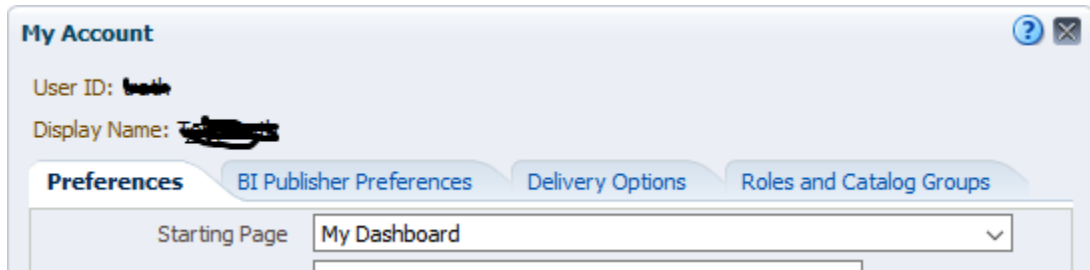


HINT: You can also add any report to your **Favorites**. This will allow quick access to the reports you frequently use.

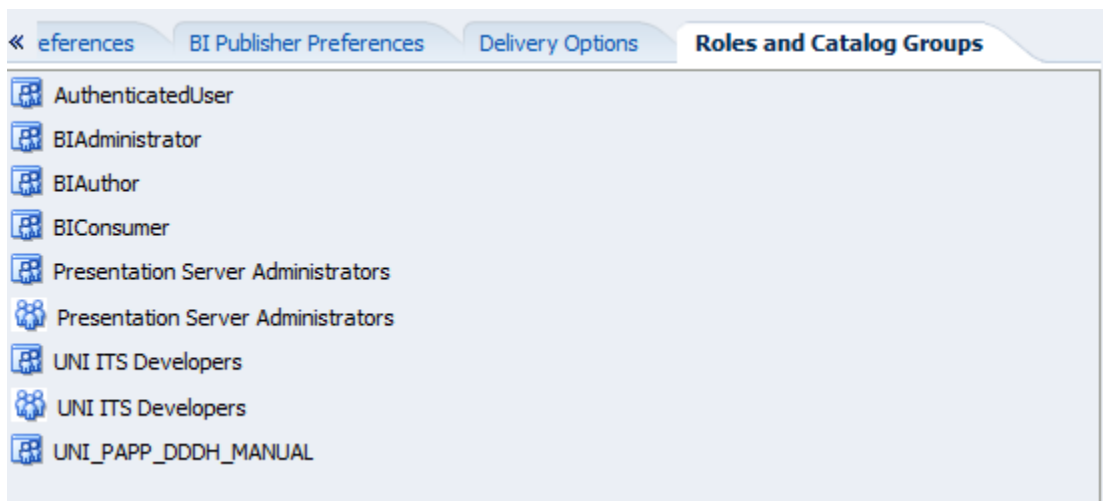
My Account:



A number of settings can be accessed by clicking on your username in the upper right hand corner and clicking the **My Account** option.

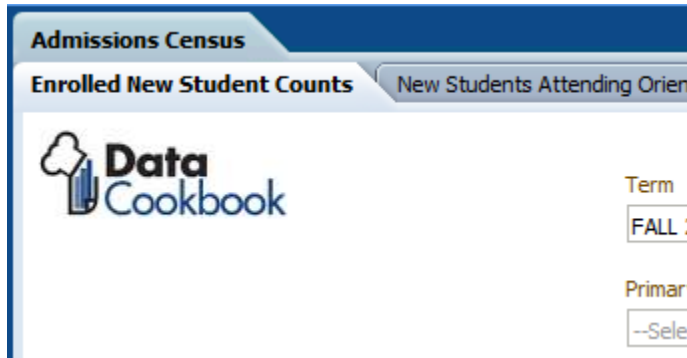


Through the **My Account** screen, you can specify the page you want to start in. **HINT:** The starting page is best set to the dashboard you access most frequently.



Under the **Roles and Catalog Groups** tab you can see what roles you currently have assigned. **HINT:** You can use these roles to search the Data Cookbook for other reports you have access too.

Data Cookbook:



The screenshot shows a web interface with a dark blue header containing the text "Admissions Census". Below the header, there are two tabs: "Enrolled New Student Counts" (which is active) and "New Students Attending Orientation". On the left side of the page, there is a logo for "Data Cookbook" featuring a stylized blue and white icon of a person with a graduation cap. To the right of the logo, there are two dropdown menus. The first is labeled "Term" and has "FALL" selected. The second is labeled "Primary" and has "--Select" selected.

To access the definitions for each report, click on the “Data Cookbook” logo on the upper right hand side of each report.

HINT: The cookbook specification contains the definition of the formulas, fields and data elements that make up the report.