OBIEE 100

Working with Dashboards Training Guide
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1) **Training Goal and Objectives**

A. **Training Goal**

This course is designed for individuals who need to learn how to navigate through OBIEE using the Home Page, and Global Header. Users will receive an overview of UConn’s Canned and Custom Reports.

*This course is not intended for individuals that need to create an analysis (report) in OBIEE. If you need to create an analysis in OBIEE please view the OBIEE 200 course materials.*

B. **Objectives**

Upon completion of this training, participants will be able to:

1. Navigate the Home Page and Global Header;
2. Understand the Basic Navigation in OBIEE;
3. View Account Settings;
4. Understand how Dashboards work;
5. View Canned and Custom UConn Reports.
2) Introduction and Overview

A. Logging In and Out of OBIEE

The HR/Payroll Data Mart project has determined that the UCONN Microsoft Active Directory (MSAD) server will be used as the external LDAP provider for supporting user authentication.

1. To access the application enter your **NetID** and **Password** into the fields provided.
2. Click on the **Sign In** button.

Quick Tip: Select the Accessibility Mode check box if you want content for OBIEE to be rendered in a browser in a way that facilitates the use of a screen reader.
2) Introduction and Overview

A. Logging In and Out of OBIEE (Cont.)

One of the following pages is displayed, depending on what has been configured for you based on your role in the organization:

- **My Dashboard** – Your personal dashboard.
- **Home page** – An access page for your most recently performed tasks with easy access to the jobs that you perform most often.

![Image of OBIEE interface](image_url)
2) Introduction and Overview

A. Logging In and Out of OBIEE (Cont.)

3. Once you have completed your tasks, click **Sign Out** to exit.

*Note:* Do not close the browser window to sign out of OBIEE.
A. Overview of Home Page

The OBIEE Home Page is organized into different sections to help you navigate the application with ease.

1. Use the Create… component to initiate the most popular tasks, such as creating an analysis or creating a dashboard.

2. Once you access a task, such as creating and analysis section, OBIEE will open a pop-up window in which you can select a Subject Area for your analysis.
   - A Subject Area contains folders, measures columns, attribute columns, hierarchical columns, and hierarchy levels that represent information about the areas of an organization’s business or about groups of users with an organization.
Navigating the Home Page and Global Header

A. Overview of Home Page (Cont.)

- Use the **Recent** component to view objects that you have recently viewed, created or updated.

- Use the **Most Popular** component to view a list of recommended objects that other users with your same role view.

Navigating the Home Page and Global Header

B. Overview of the Global Header

The Global Header is always available to you no matter what screen you navigate to:

1. SEARCH – the search function can be used to search for specific criteria
2. HOME – which navigates you back to the home page
3. CATALOG – which includes all the information in your personal folders and in shared folders
4. FAVORITES – used to keep your own personal list of favorites
5. DASHBOARDS – which is broken up into modules and displays the various dashboards to the analysis and info you need
6. NEW – which is used to display a list of objects that you can create
7. OPEN – which gives you quick access to your objects
3) Navigating the Home Page and Global Header

C. Viewing Account Settings

You can easily manage your account settings from the Global Header by clicking on your displayed name.

1. Click on your **displayed name**.
2. Then click on the **My Account** link.
C. Viewing Account Settings (cont.)

The My Account screen has multiple tabs. The most commonly used tabs are Preferences and Roles and Catalog Groups.

1. The Preferences tab lets you change things, including the default page you see when you log into OBIEE. By default you are brought to the Home Page, for example, you could change the settings to display your dashboards instead.

2. The Roles and Catalog Groups tab shows you the roles you have been assigned in OBIEE.

3. Click OK to close the My Account Window.
4) Working with Dashboards

A. What is a Dashboard

With the OBIEE Dashboard tool, you have the capability to run ad-hoc reports and analysis as per specific business requirement models. These interactive dashboards are pixel perfect reports which can be directly viewed or printed.

From the Dashboards drop-down menu you will have access to any dashboards you created as well as canned and custom University dashboards.

1. Click the Dashboards drop-down menu to access the available dashboards, and choose UConn Payroll.
2. Now you will view UConn HR.

Note: Your roles and security govern what dashboards you have access to.
A. What is a Dashboard (Cont.)

If you are not interested in seeing all the data in the dashboard, the Dashboard Prompts allows you to add prompts to the Dashboard Prompts allow you to restrict what data is displayed. Dashboards also allow you to select from drop-down lists, multi-select boxes, and selection of columns to display in the reports.

2. Determine if you want to filter your data by using a Dashboard Prompt.

3. Once you have selected all of the criteria for the Dashboard Prompts, click the Apply button.

Note: Drilling is the action to discover the data along an hierarchy (i.e. through the different levels). In OBIEE, drilling is one way to navigate or interact within the data. Drill down: from one level to lower level of the same hierarchy. You may drill down on any term/value that is blue (similar to a hyper link).
4) **Working with Dashboards**

C. **Working with Dashboard Properties**

To work with the Dashboard’s different functionalities, click on the **Open** link.

Once opened, data can easily be manipulated, such as:

- Sort the data,
- Move columns to a prompt, or
- Exclude a column.
4) Working with Dashboards

C. Working with Dashboard Properties (Cont.)

1. To sort your data, click the Sort Ascending Arrow (or Descending once changed) to sort your data alphabetically.

2. By right clicking on the column header, you can display additional features. For example, you can clear the sorting you created.
C. Working with Dashboard Properties (Cont.)

3. From the menu, you can create a prompt for your column, by choosing **Move Column**, and then clicking on **To Prompts**. This will create a prompt to allow you to choose what you would like to view within that column.

4. To change it back to a column, without prompts, right-click on the column header, and choose **Move Column**, to Columns.
4) Working with Dashboards

C. Working with Dashboard Properties

5. If you would like to exclude a column from displaying, right-click on the column header, and choose the Exclude Column option from the menu.

Note: Depending on the how the Analysis was configured and your permissions you may have additional links at the bottom of the analysis that allow you to Refresh, Print, and Export the analysis.
4) Working with Dashboards

C. Working with Dashboard Properties

6. Be sure to save your customizations to the dashboard, by clicking on the Page Options icon, located near the upper right. Choose Save Current Customization... to save your work.

7. You also have other menu options to choose from such as:
   - Print,
   - Export to excel, or
   - Clear My Customizations, which will remove any saved customizations.
### Exercise One - Treasure Hunt

<table>
<thead>
<tr>
<th>Question #</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>What is the landing page called in OBIEE?</td>
</tr>
<tr>
<td>2.</td>
<td>The ______________ section of the Home page shows recently activity.</td>
</tr>
<tr>
<td>3.</td>
<td>Where can you find canned and custom UConn Analyses?</td>
</tr>
<tr>
<td>4.</td>
<td>How many UConn custom analyses are there in the Dashboards drop-down menu?</td>
</tr>
<tr>
<td>5.</td>
<td>Under the <strong>My Account</strong> what is the third menu option listed on the <strong>Starting Page</strong> field?</td>
</tr>
<tr>
<td>6.</td>
<td>How many pages are displayed in the Payroll Dashboard? (Payroll users) How many pages are displayed in the Workforce Effectiveness? (HR Users)</td>
</tr>
</tbody>
</table>
| 7. | Right clicking on a column header with in a Dashboard provides you with what options?  
   1.  
   2.  
   3. |
| 8. | What is the proper way to log out of OBIEE?  
   1. Closing down your computer  
   2. Clicking the ‘X’ or Red bubble on your browser  
   3. Clicking Sign Out |
**Action**
Rule result which can impact users such as forcing them to register a security profile, KBA-challenging them, blocking access, asking them for PIN or password, and so on.

**Alert**
Rule results containing messages targeted to specific types of Oracle Adaptive Access Manager users.

**Attribute**
Attributes are the particular pieces of information associated with the activity being tracked. An example is the time of day for a login. Patterns collect data about members. If the member type is **User**, the pattern will collect data about users.

**Condition**
Conditions are configurable evaluation statements used in the evaluation of historical and runtime data.

**Dashboard**
Provides a real-time view of activity via aggregates and trending.

**Dashboard Page**
A user interface or Web page that gives a current summary, usually in graphic, easy-to-read form, of key information relating to progress and performance, especially of a business or website: Our managers use an interactive dashboard to monitor employee data.

**Environment**
Tools for the configuration system properties and snapshots

**Filters**
Filters are used to limit the results that are displayed when an analysis is run, so that the results answer a particular question. Based on the **filters**, only those results are shown that matches the criteria passed in the **filter** condition. **Filters** are applied directly to attribute and measure columns.
Groups
Collection of like items. Groups are found in the following situations
Groups are used in rule conditions
Groups that link policy to user groups
Action and alert groups

HTTP
Hypertext Transfer Protocol

IP address
Internet Protocol (IP) address

Job
A job is a collection of tasks that can be run by OAAM. You can perform a variety of jobs such as load data, run risk evaluation, roll up monitor data, and other jobs.

KPI
A KPI is a measurement of a particular business process which is compared against specific goals and objectives of an organization

Rule Conditions
Conditions are the basic building blocks for security policies.

Rules
Rules are a collection of conditions used to evaluate user activity.

Subject Area
A subject area contains:
- folders,
- presentation tables,
- measure columns,
- attribute columns,
- hierarchical columns.

User
A business or person, etc., that is authorized to conduct transactions.

Validations
Answer validation used in the KBA question registration and challenge process.