Introduction to HCM DataMart
Training Guide
1) Training Goal and Objectives

A. Training Goal

This is an Instructor Led hands-on course, designed for people who need to learn how to navigate through OBIEE as well as understand its basic functionality.

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. Understand Dashboards; and
4. Utilize customizations, printing and exporting functions.
A. Overview of Home Page

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

- Use the **Recent** component to view objects that you have recently viewed, created or updated
- Use the gray bar, known as the **Global Header** to access different functions, including various analyses.

**Note:** Analysis is another word for query.
Navigating the Home Page, Global Header, and Dashboards

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 utilizing OBIEE’s functions
7. **OPEN** – which gives you quick access to your objects
B. Overview of the Global Header (Cont.)

You can browse or search for Analyses and files within the Catalog:

- Once you click on the Catalog, it will display your personal folders (*My folders*) and *Shared folders* that you have access to.
- The catalog page displays objects in the catalog and allows you to perform tasks specific to those objects (for example: any saved customizations you performed).

Note: The objects and options that are available to you are determined by your system roles and the permissions assigned at the folders and objects level.
2) **Navigating the Home Page, Global Header, and Dashboards**

**B. Overview of the Global Header (Cont.)**

- Once in the **Catalog**, you can expand or collapse the folders to view sub-folders within them. Sub-folders are also displayed in the pane to the right side of the folders section.

![Image of Catalog interface]

- Within the sub-folders are various drop down menus, which offer are different features that you can access:
  - **Expand** - Displays the last date and time the report was modified. Along with the owner of the report NetID.
  - **Open** - Displays the report in the format in which it was developed.
  - **Edit** - Takes you to the Results tab of the report when you can make the necessary changes to the report.
  - The **More** link opens a drop-down menu where you can do things like Print, Export, Delete, Copy, Rename, and so on.
C. **What is a Dashboard vs. “Canned Reports”**

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 prebuilt University dashboards, that are located under Human Capital Management.

- Click the **Dashboards** drop-down menu to access the available dashboards, and choose a report.

  For training, Click on the **UC Any and All Report** from the drop down menu, and refer to the Any and All Report User-guide.

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Note: Your roles and security govern what dashboards you have access to.