Oracle Business Intelligence Enterprise Edition 11g

*Training: Using Pre-defined Dashboards in OBIEE 11g, WSU Census*

Washington State University
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Getting Oriented

a. Firefox is recommended

b. Browser Pop-Up Blocker (One time setting)

1. At the top of the Firefox window under ‘Tools’ click “Options”.
2. Select the “Content” Panel.
3. Check “Block Pop-up Windows”.
4. Click on “Exceptions”.
5. Add “https://csprd92.wsu.edu” and click “Allow” to add an Exception

Note: If you have a newer version of Firefox, look for ‘options’ in the top right corner when you click on the three horizontal lines (open menu) and find pop-up blocker exceptions.

Exceptions Window
c. Clearing cache – since the pages are cached and the cached pages may impact results

1. At the top of the Firefox window click “Options”.

2. Select the “Advanced” Panel.

3. Then select the “Network” tab.

4. In the Cached Web Content section, click “Clear Now” to clear the cache.

5. In the future, if you want Firefox to automatically clear cache, follow the instruction at http://mzl.la/MyNb9w under “Automatically Clear Cache” section.

Logging into OBIEE

1. Before entering OBIEE, you must first log into my.wsu.edu (zzusis).

2. After logging into zzusis, click on OBIEE Reporting tile

3. OBIEE 11g will now open.
**30 Minute Time Out**

Similar to OBIEE 10g, there is also an inactivity time out that it is every 30 minutes.

By clicking on the OK button your session will be extended an additional 30 minutes.

**General OBIEE Navigation**

Below is the home screen for the new OBIEE 11g. From here, two of the most common features can be accessed; the ‘Dashboard’ dropdown from the Menu Bar at the top right and the ‘Create’ sidebar on the left. Under the ‘Create’ sidebar, a user can start a new Analysis (aka report in 10g), Dashboard, Filter, or Dashboard Prompt.

The Dashboard dropdown menu will display all the existing dashboards that a user has the ability to access. Some examples include the Grades dashboard from Student Records, WSU Census, or the High School Admissions dashboard from Undergraduate Admissions.

Some of the other actions that can be completed from the home screen include browsing through folders and files, opening existing queries or dashboards, and publishing a job.
**WSU Census Dashboard Overview**

To navigate from the 11g Home Screen to the WSU Census Dashboards, select the ‘Dashboard’ Dropdown and click on the desired subject folder. There are multiple reports contained within each subject folder.

For example, clicking on the ‘Courses’ subject folder will bring up the below image. The top tab will display the subject folder with all the report tabs below.
Hovering over a report tab will show the description for that report.

The reports have a similar layout with editable prompts at the top followed by the information below.
Changing Prompts in Dashboard Reports

To alter the information being displayed on a report, click on the arrow to view the options in the drop down box and select the criteria you wish to be shown. Once all the prompts are set, click on ‘Apply’.

The ‘Reset’ button will provide three options if selected.

- **Reset to last applied values** – Sets prompts to the values that were last used.
- **Reset to default values** – Sets the prompts to the default (will be covered later)
- **Clear All** – Sets each prompt to have no selected filter (if this is applied to the report, by default the report will be run with all the possible values for the variable)

The reports on each dashboard page all have default values for their prompts that will appear when a report is first shown. However, a user has the ability to create and save their own default and custom prompts to save time when viewing the same report.
Prompt Customization:

a. To save a certain group of prompt values, set each prompt to the desired values and Apply them.

b. Next, click on the ‘Page Options’ button ( ) in the top right of the screen to bring up the following drop down.

c. Click ‘Save Current Customization...’

d. In the dialogue box that pops up give the Customization a descriptive name, such as ‘Vancouver 2014’ for a customization of Campus = Vancouver and Academic Year = 2014.

e. Marking the checkbox to ‘Make this my default for this page’ will bring up these prompt values whenever this report is opened.

 NOTE: This default is only for this report. If there are multiple reports that you want the same customization to apply to, you need to go through the above process for each of the reports.
f. Once multiple Customizations have been saved to a single report, a user can switch between the Customizations with the ‘Apply Saved Customization’ menu.

![Menu options](image)

g. The ‘Edit Saved Customizations’ can also be used to rename, delete, and change the default customization.

**Export to Excel**

Reports in the WSU Census dashboard may be exported to Microsoft Excel to perform further analysis. To do so, select Export at the bottom of the dashboard page. Once selected, there will be five different export options. Select Excel, and the report will now begin to export.

![Export options](image)

**NOTE:** If you would like to view the report’s raw data in Excel, export to either the ‘CSV Format’ or the ‘Tab delimited Format’ through the ‘Data’ option (covered next).
**Export to Excel (Raw Data)**

Raw data of reports in the WSU Census dashboard may also be exported to Microsoft Excel to perform further analysis. By exporting the raw data into Excel instead of the dashboard report itself, it can allow for an easier experience when further analyzing the data since there will be no need to reformat the Excel worksheet.

To export the raw data into Excel, first select **Export** at the bottom of the dashboard page. Once selected, there will be five different export options. Select Data, and then either select ‘CSV Format’ or ‘Tab delimited Format’. Both selections will do the same thing, which is export the raw data into Excel.

![Export to Excel Options]

**Export to PDF**

Reports in the WSU Census dashboard may also be exported to PDF format. To do so, select **Export** at the bottom of the dashboard page. Once selected, there will be five different export options. Select PDF and the dashboard page will now be exported into a PDF. You will then have the option to either open or save the PDF.

![Export to PDF Options]
Printing the Dashboard Page

Dashboard pages in WSU Census may be printed as either a printable PDF, or a printable HTML. There are two different areas on the page where Print may be selected.

1. Under the Page Options dropdown in the top right corner of the dashboard, there is a Print option. Once selecting Print, the user is able to select their preference of either a Printable PDF, or a Printable HTML.

2. To perform the other option available when printing, select Print at the bottom of the dashboard page. Once selected, the user is again able to select their preference of either a Printable PDF, or a Printable HTML.