Oracle Business Intelligence (OBI)

Oracle Business Intelligence (OBI) is a web-based reporting tool used to support the campus community's academic and administrative offices.

With OBI, you can pull data in a dashboard or a prebuilt report.
- Data can be viewed within OBI
- Or you can export the data in a variety of formats for analysis

Data in OBI is refreshed at 1:00 a.m. each day.

Dashboards

Dashboards are dynamic. Each Dashboard includes dashboard pages or tabs that you can use to access different data.
- Each dashboard has prompts at the top
- Data is displayed at the bottom

Dashboards provide:
- Ability to save a customization
- Drilldown: blue text indicates that you can drilldown for further detail
- Breadcrumbs: allow navigation to the previous screens
- Export reports and transactional data in a variety of formats:
  - Microsoft Excel, CSV, Word, or PDF

Save A Customization

Prompts allow you to query specific data in order to narrow your data results. If you query the same data regularly, you can save your custom prompt for future use. If you choose to save your custom prompt, please note that it is associated with the dashboard page that is currently selected.

1. Navigate to the desired **Dashboard Page**.
2. *(asterisk) is a required field. Select the desired **Prompts** and click **Apply**.
3. After you specify your **Prompts** and click **Apply**, you may save your custom prompt for future use.
4. To save your custom prompt, click **Page Options**   .
5. Click **Save Current Customization**.
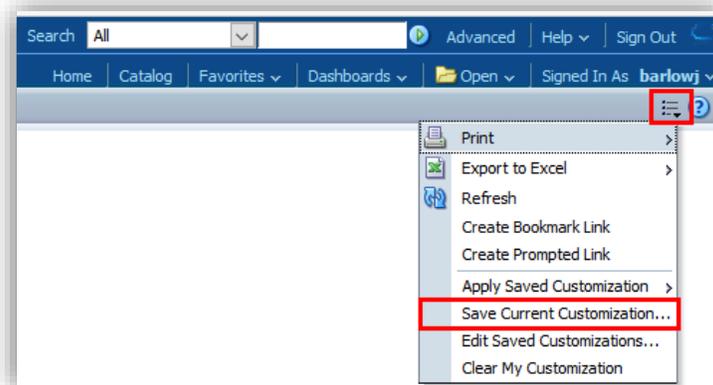
6. Enter a **Name** for your custom prompt. If you want your customized prompt to be the default for the current dashboard page, click the *optional* **checkbox** next to *Make this my default for this page*.

If you click this checkbox, each time you access the current dashboard page, your saved customization will automatically display.

7. Click **OK**.

Drilldown to View Further Detail

Drilling-down involves clicking on data at the summary level to reveal detailed information. To drill-down, click the desired **hyperlink** (blue text). The details will display.

Breadcrumbs

When you drill-down in a dashboard, you do not have to re-run the analysis like you do for reports. You may use the breadcrumbs to navigate back to the summary level. To navigate back to the summary level, click the desired **Summary Level** in the breadcrumbs trail at the bottom (left) of the screen. The breadcrumbs trail is associated with the dashboard page that is currently selected as well as the selected drilldown.


In the example above, to navigate back to the summary level, click **GL General: GL Funds Available** in the breadcrumbs trail at the bottom of the screen.

Export to CSV

1. You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. To export the data, click **Export**.

2. If you export to CSV, the cell/text format shown in OBI will not be exported to your file. The file will contain the raw data only. For example, cells will not be shaded and merged cells will be unmerged with values shown in each row. As a result, you can format the data as desired. To export the data to CSV Format, click **Export**, trace to **Data**, and click **CSV Format**. Upon confirmation, click **Open** to open the CSV file.
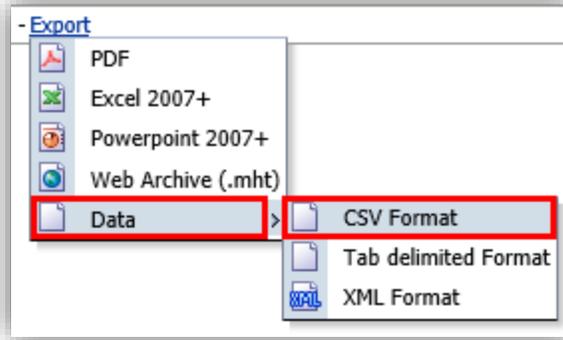
3. If you export data to CSV, spend time formatting the data, and wish to save your work, you must re-save the CSV file to Microsoft Excel to retain formatting. To retain formatting, from the **File** menu, click **Save As**. **Specify where you would like to save the file** and **enter a *File name*** that you will recognize. Under *Save as type*, click **Excel Workbook (*.xlsx)**.
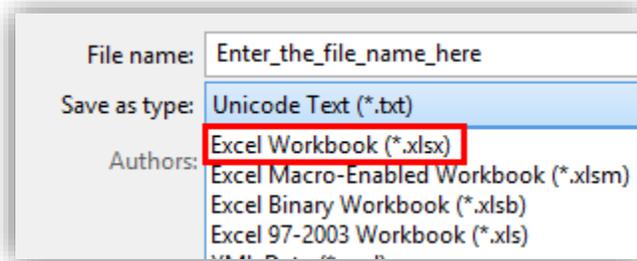
WARNING: BY DEFAULT, A CSV FILE IS SAVED AS TEXT ONLY. AS A RESULT, TO SAVE YOUR FORMATTING, YOU MUST RE-SAVE THE CSV FILE WITH A MICROSOFT EXCEL EXTENSION (.XLS*).

Export to Microsoft Excel

If you export to Microsoft Excel, it will maintain the OBI formatting that you see on your screen. To export the data to Microsoft Excel, click **Export** and then click **Excel 2007+**. Upon confirmation, click **Open** to open the Microsoft Excel spreadsheet.