

# Welcome to OBIEE

## Hands-On Workshop

**5 Steps** to facilitate the Consumer → Author Transition

OBIEE Platform Training

Bucharest, 05 april 2017

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Company: Reporting Center

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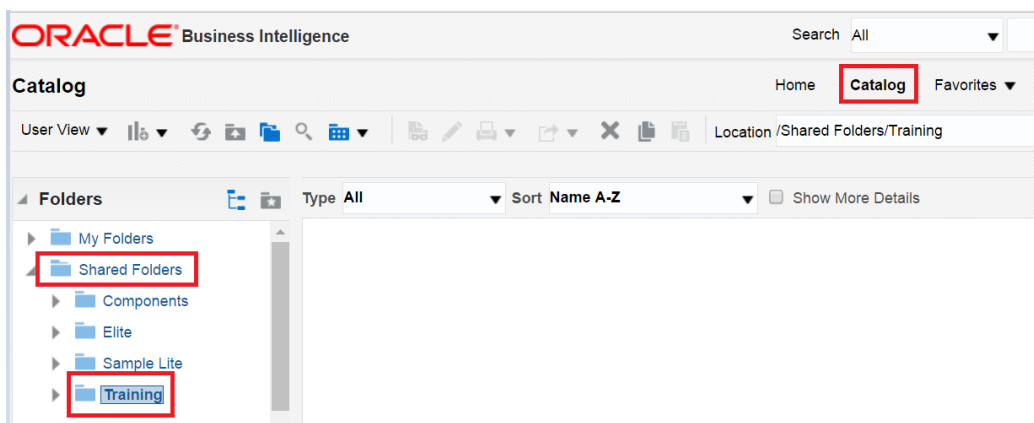
# Login to OBIEE

Link: <http://153.92.37.173:9502/analytics>

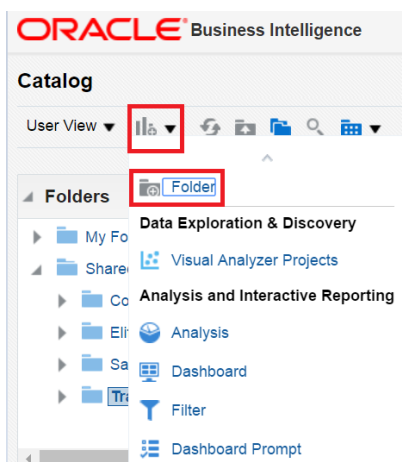
User, Pass: there will be used the trainer indications

## Step 1: How to Create a Folder Catalog

1. Go to Catalog → Shared Folders → Training

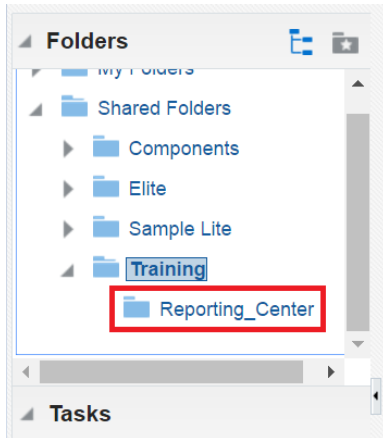


2. Click on Training folder.
3. Click on New → Folder to create a subfolder in Training. Name the subfolder Bank prefix\_ your initials (ex.: ALPH\_AG, BPST\_OC, OTPB\_OS).



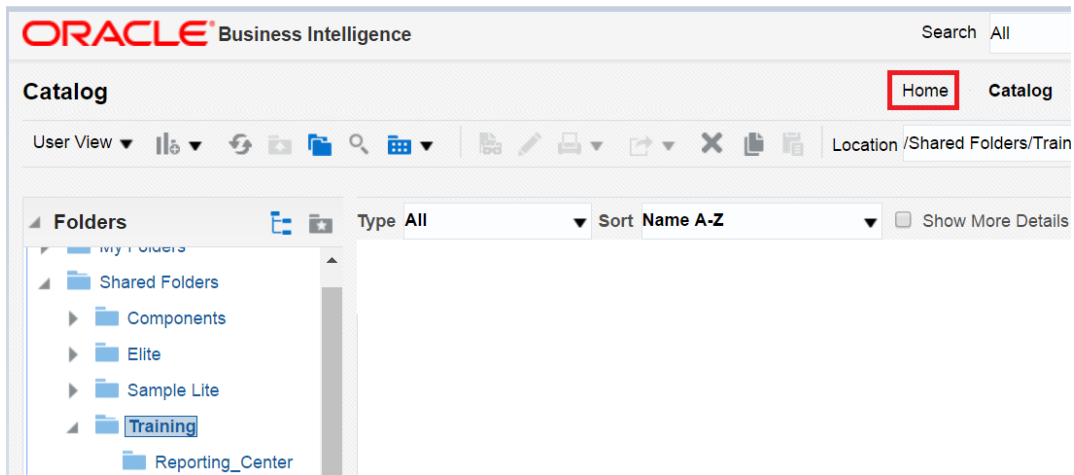
4. You will save all future work (Dashboards, Analysis, Parameters) in this folder:

Catalog → Shared Folders → Training → your folder

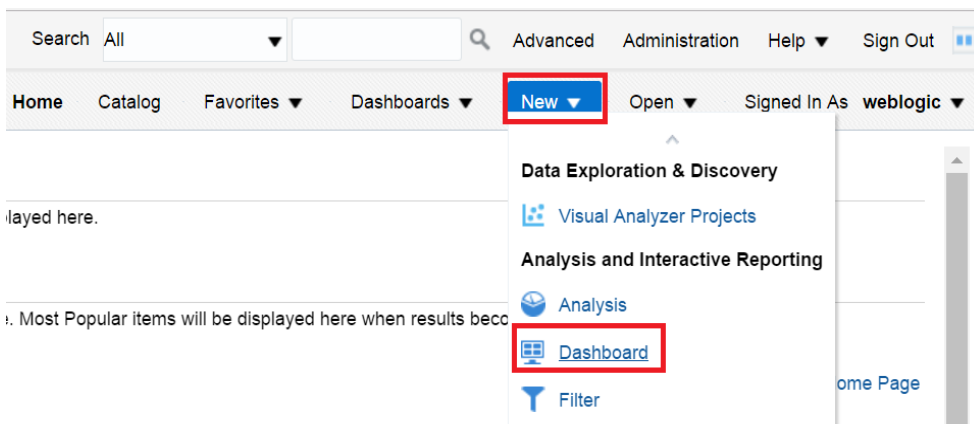


# Step 2: How to Create a Dashboard

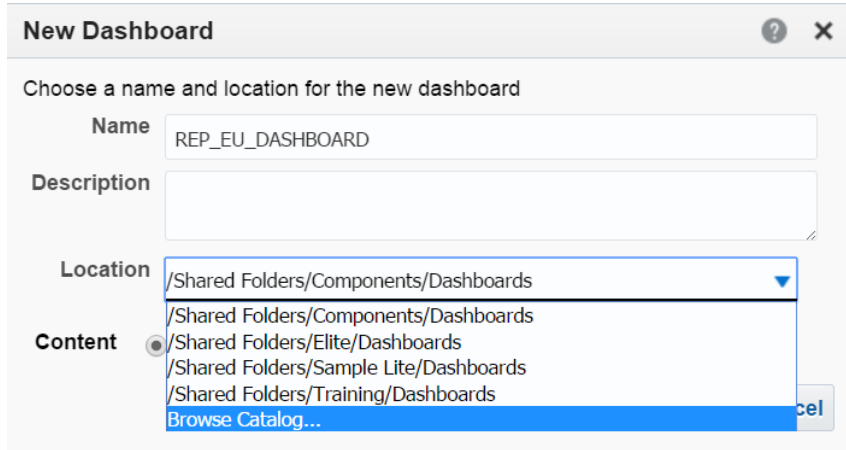
5. Click Home



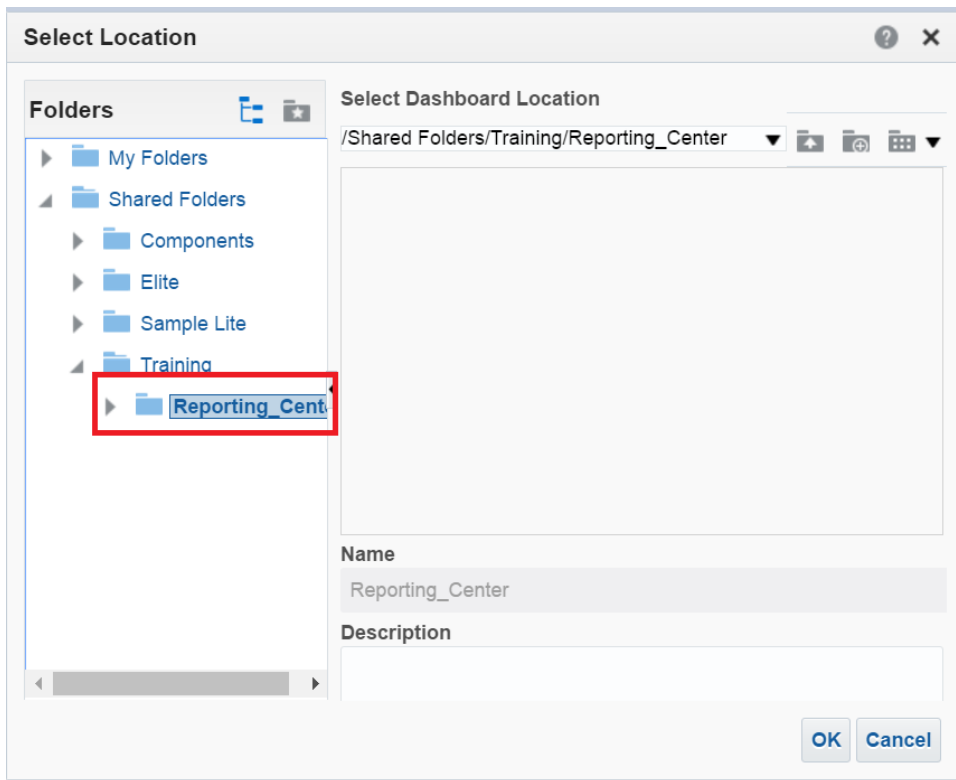
6. Go to New → Dashboard



7. Name the Dashboard BANK prefix \_ Your Initials \_ Dashboard
8. Click the drop-down for Location
9. Click Browse Catalog

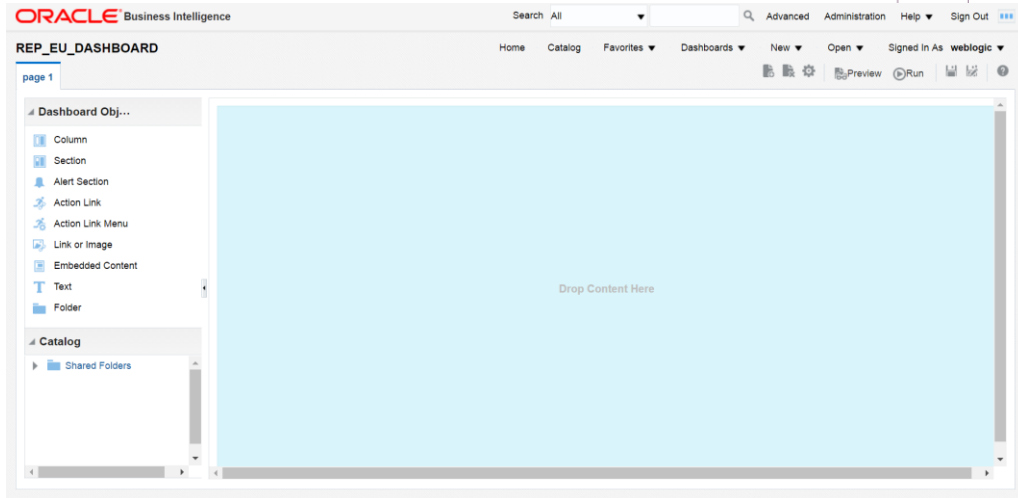


10. Choose your folder. Click OK



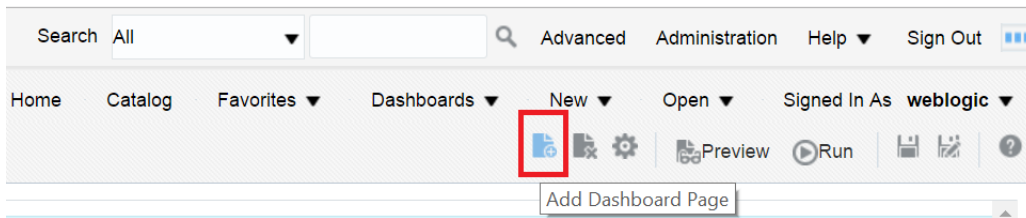
11. Click OK

12. You have an empty Dashboard

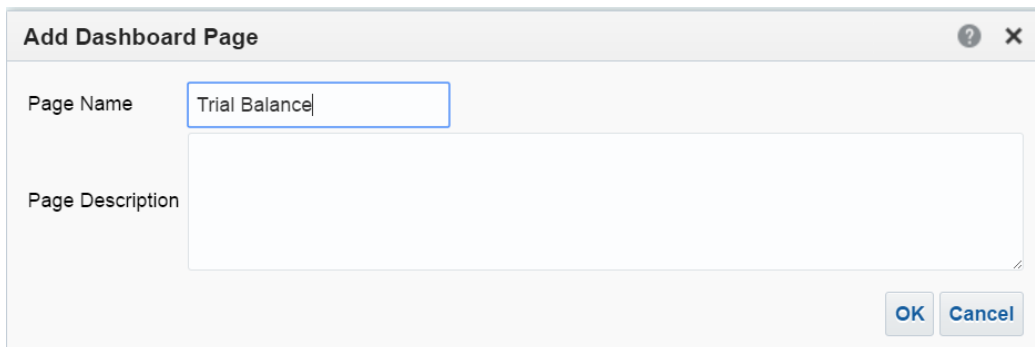


13. Let's add 4 pages / tabs to the Dashboard (General Parameters, Trail Balance, Drill Down, Graphs)

14. Click "+" button

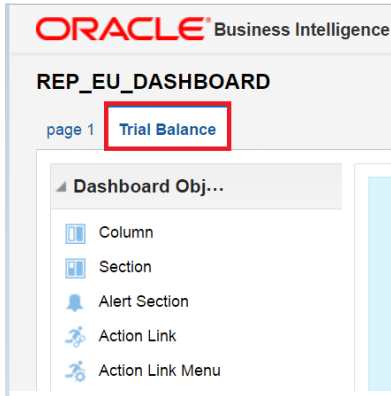


15. Add **Trial Balance** tab

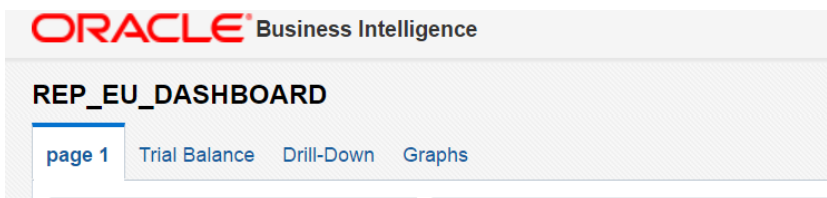


16. Click Ok.

17. Notice the tab was positioned after the Default tab.

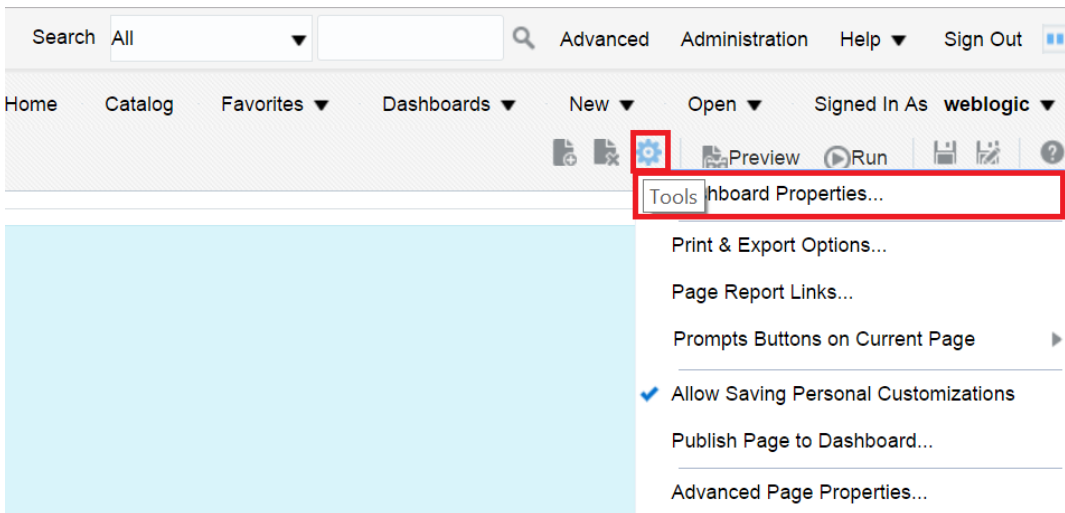


18. Repeat steps 14-16 to add other tabs named: Drill-Down and Graphs



19. Let's rename the first default tab to **General Parameters**

20. Go to Tools → Dashboard Properties



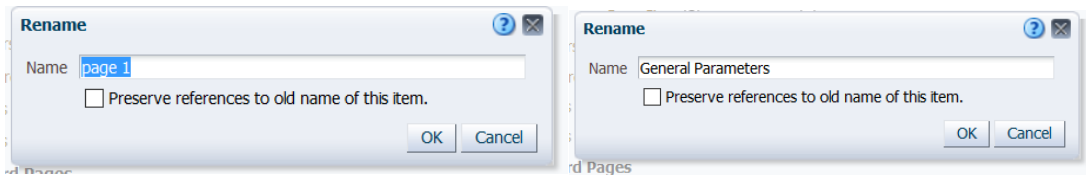
21. Select **page 1** record and then click Rename button.



**Dashboard Pages**  
 Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

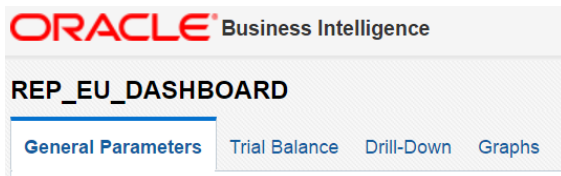
Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trial Balance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Drill-Down	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Graphs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

22. Rename to **General Parameters**



23. Click Ok twice

24. Notice all tabs have names



25. Let's change the tabs order

26. Go to Tools → Dashboard Properties

27. Click on **Trial Balance** record

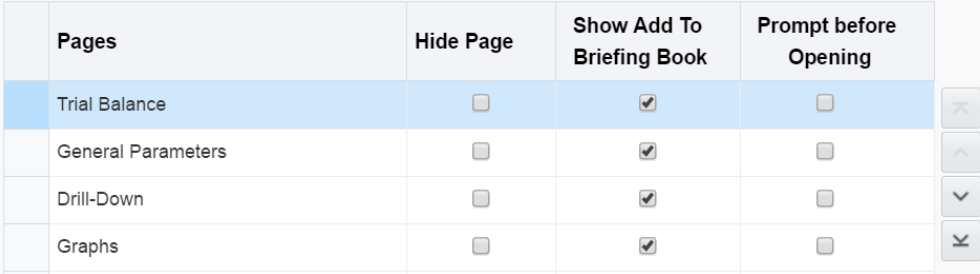
28. Press up arrow

**Dashboard Pages**  
 Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
General Parameters	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trial Balance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Drill-Down	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Graphs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Move selected items up

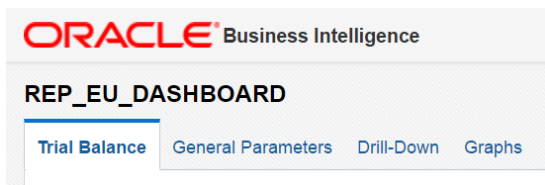
**Dashboard Pages**  
 Except for Hide and Reorder, clicking Cancel will not undo operations in this section.



Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
Trial Balance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Parameters	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Drill-Down	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Graphs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

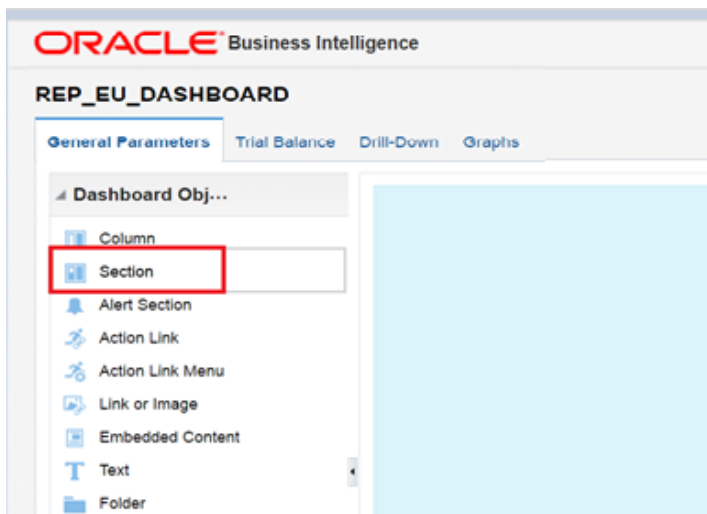
29. Press Ok.

30. Check the tabs order



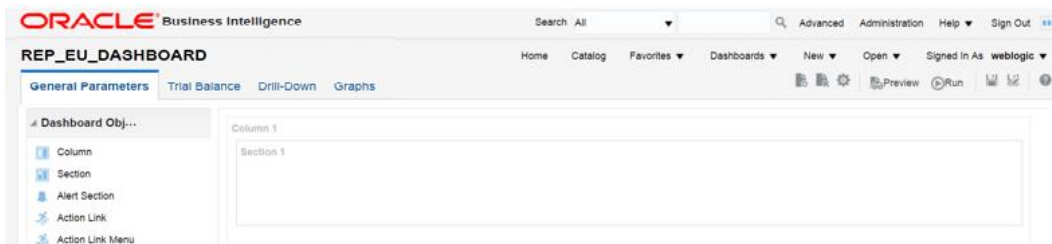
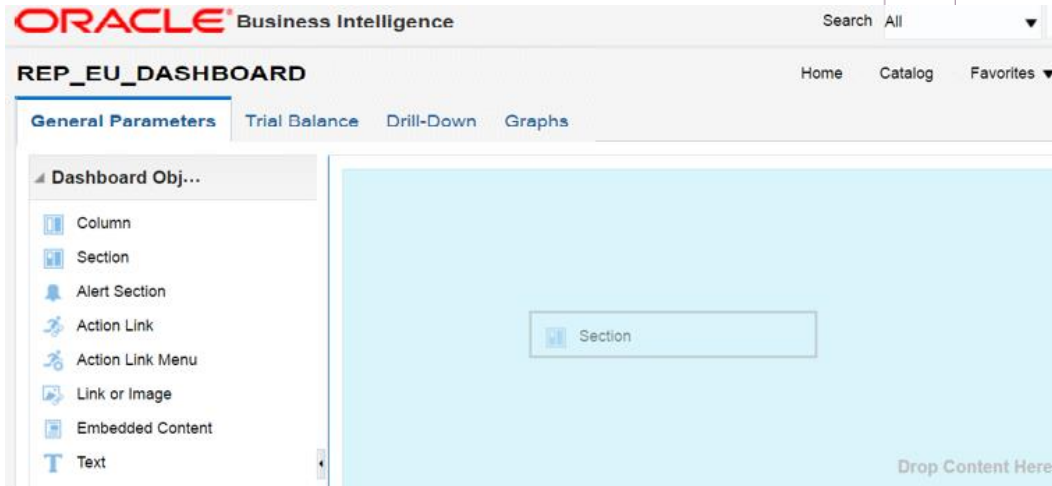
31. Repeat steps 26-30 to move back on the second position **Trial Balance** tab.

32. Let's add a section the the first tab.

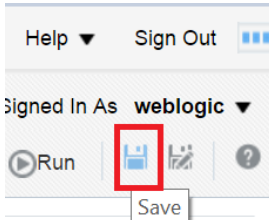


33. Click on the Section

34. Drag onto the Content

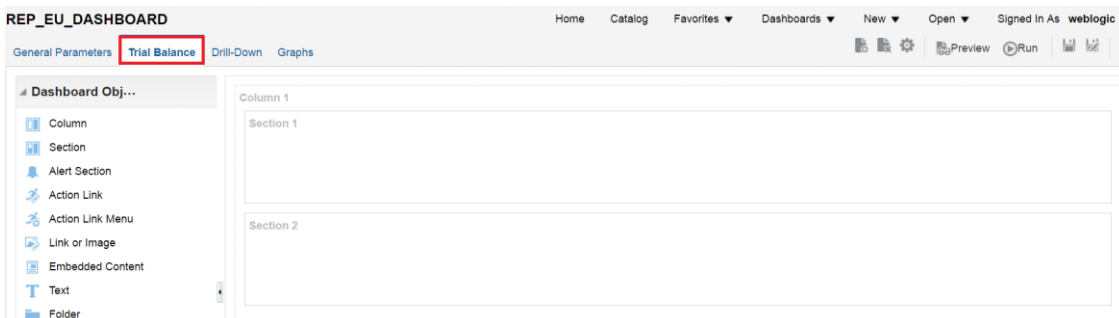


35. Click Save



36. Repeat steps 33-35 to add two sections in **Trial Balance** and one section in **Drill-Down**

37. Click Save after each tab.



REP\_EU\_DASHBOARD Home Catalog Favorites Dashboards New Open Signed In As weblogic

General Parameters Trial Balance **Drill-Down** Graphs

Dashboard Obj...  
Column  
Section  
Alert Section  
Action Link

Column 1  
Section 1

38. For Graphs tab, add two columns, each with one section.

REP\_EU\_DASHBOARD Home Catalog Favorites Dashboards New

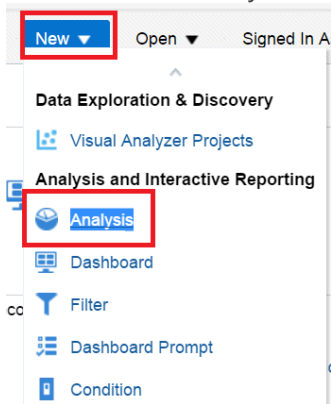
General Parameters Trial Balance Drill-Down **Graphs**

Column 1  
Section 1

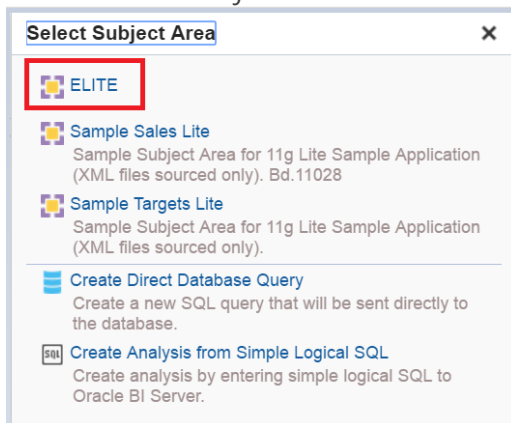
Column 2  
Section 2

# Step 3: How to Create an Analysis

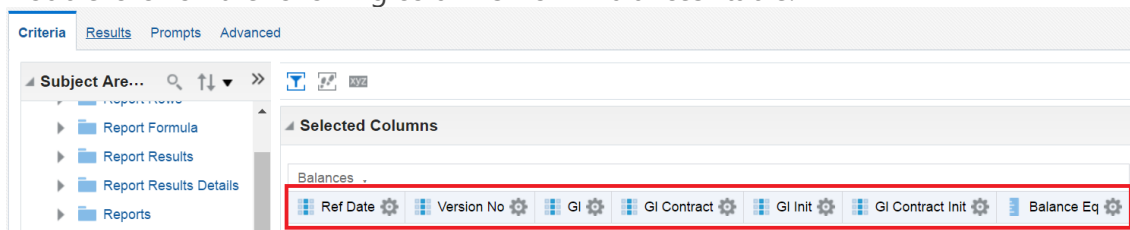
39. Go to New → Analysis



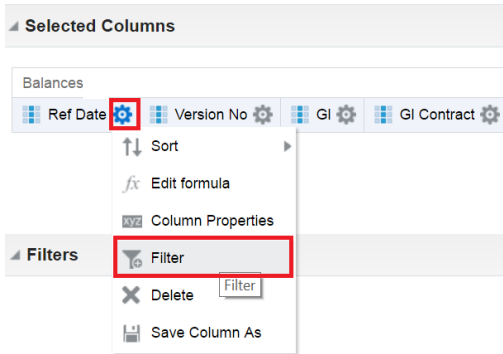
40. Choose ELITE Subject Area



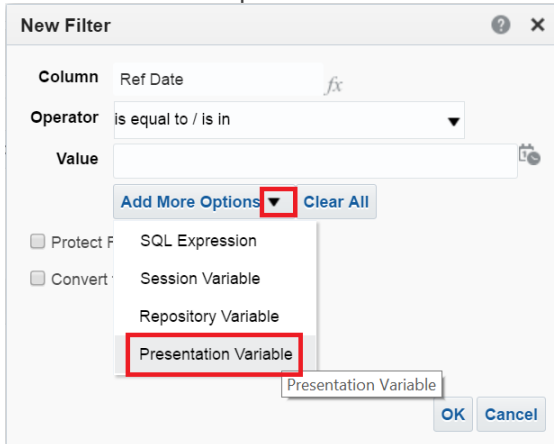
41. Double-click on the following columns from "Balances" table:



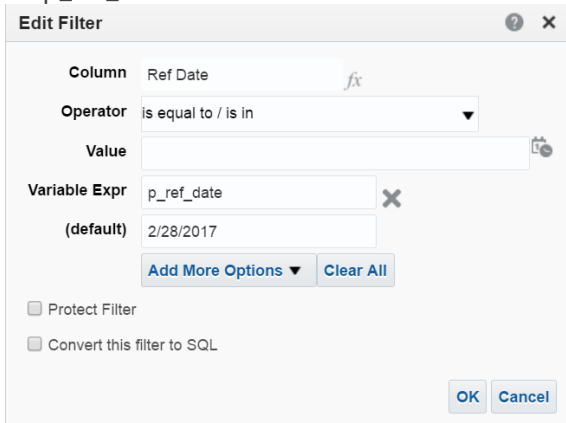
42. Add filter on "Ref\_Date"



43. Select Add More Options → Presentation Variable



44. Set p\_ref\_date as the Presentation Variable with implicit value "2/28/2017".



45. Click OK

46. Follow steps 42-44 to add filter on "Version No".

**New Filter**

Column: Version No *fx*

Operator: is equal to / is in

Value: [ ]

Variable Expr (default): p\_version\_no

[ ]

Add More Options Clear All

Protect Filter

Convert this filter to SQL

OK Cancel

**Selected Columns**

Balances\_

Ref Date Version No GI GI Contract GI Init GI Contract Init Balance Eq

---

**Filters**

Ref Date is equal to / is in @{{p\_ref\_date}}{2/28/2017}

AND Version No is equal to / is in @{{p\_version\_no}}{1}

## Feature: Multiple Sort

47. Sort values by GL, GL Contract, GL Init, GL Contract Init.

**Selected Columns**

Balances\_

Ref Date Version No GI GI Contract GI Init GI Contract Init Balance Eq

Sort

- Sort Ascending
- Sort Descending
- Add Ascending Sort
- Add Descending Sort
- Clear Sort
- Clear All Sorts in All Columns

**Filters**

Ref Date is equal to / is in @{{p\_ref\_date}}

AND Version No is equal to / is in @{{p\_versior}}

48. Repeat step 47 to sort columns GL Init, GL Contract Init

49. Let's rename the column "BALANCE\_EQ" to "Balance (RON equivalent)"

50. Click on Properties → Column Properties

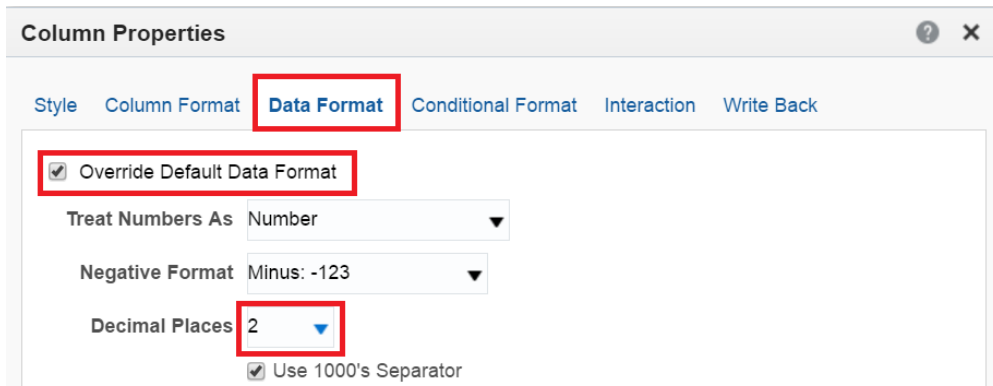
51. Go to "Column Format" tab and check "Custom Headings".

52. Type "Balance (RON equivalent)" in "Column Heading" field.



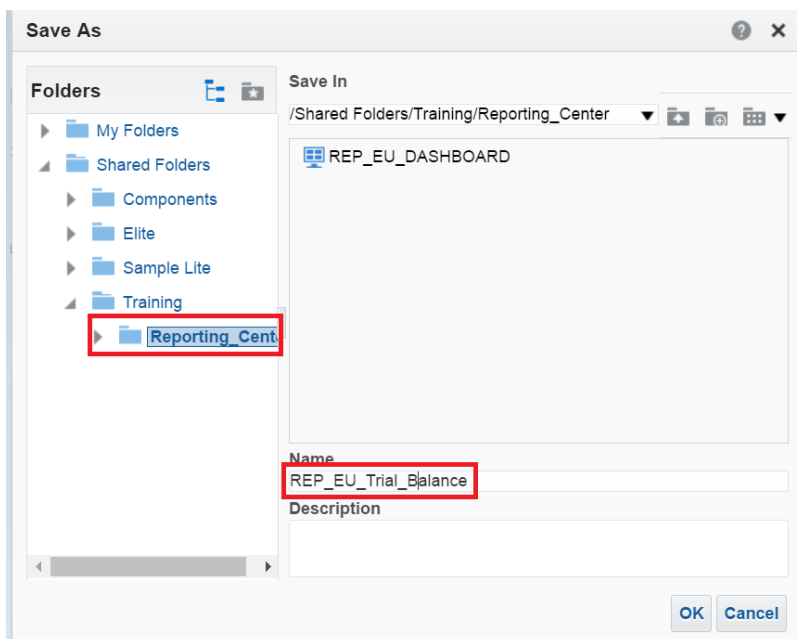
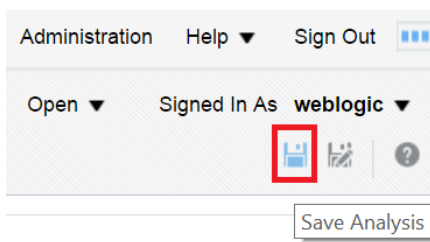
53. Let's display "Balance (RON equivalent)" column with 2 decimals.

54. Click Data Format → Decimal Places = 2.



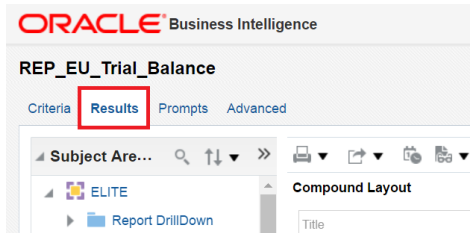
55. Click Ok.

56. Click Save and save the Analysis in your folder with your prefix in the name.

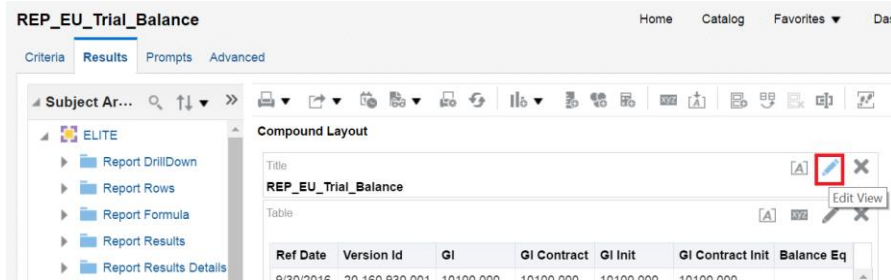


57. Click Ok

58. Go to Results Tab



59. Edit the Title (select the Title and click on the Pencil)



60. Uncheck **Display Saved Name**

61. Fill the title with: "Trial Balance" and subtitle with: "Ref date = @{p\_ref\_date}; Version = @{p\_version\_no}"

62. Click Done

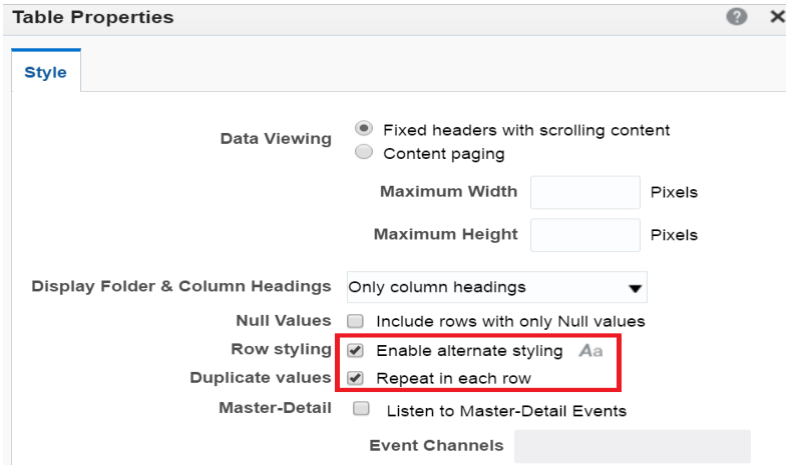


63. Let's alternate the color of the rows

64. Click View Properties (Results tab)



65. Check **Enable alternate styling** and **Repeat in each row**

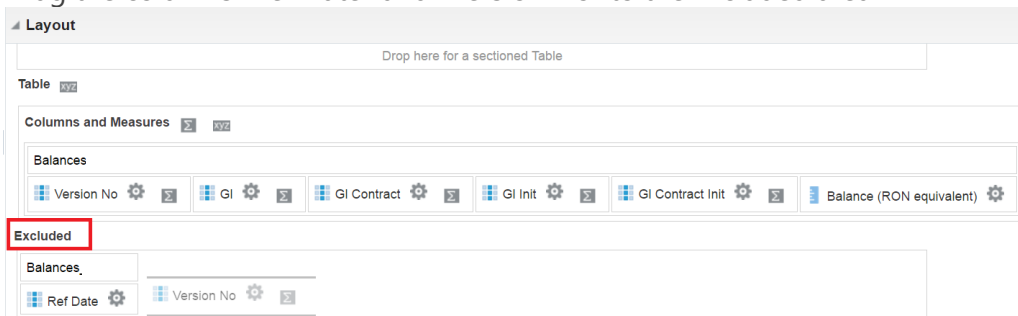


- 66. Click Ok
- 67. Click Edit View

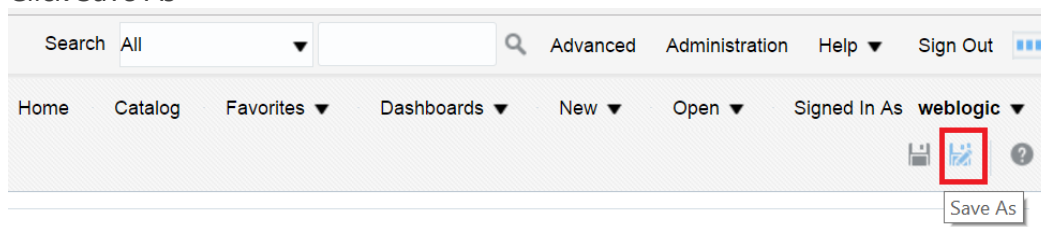
**Compound Layout**

Ref Date	Version No	GI	GI Contract	GI Init	GI Contract Init	Balance (RON equivalent)
2/28/2017	1	10100.000	10100.000	10100.000	10100.000	-21,093,692.19

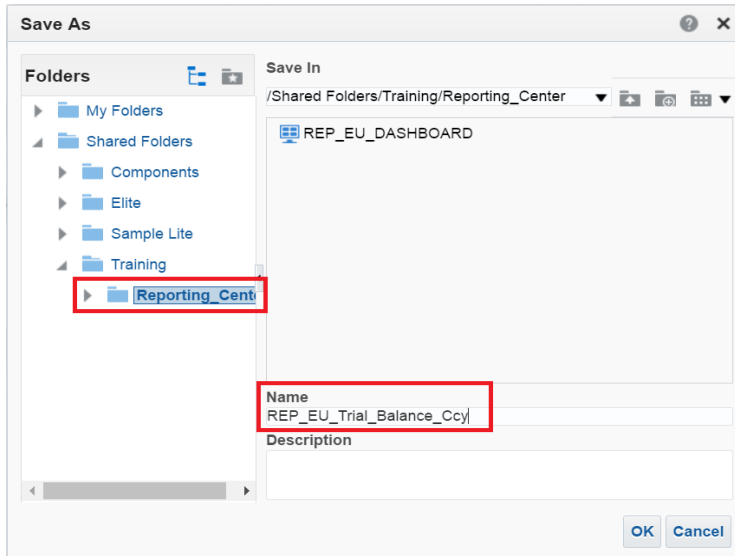
- 68. Drag the columns "Ref Date" and "Version No" to the Excluded area



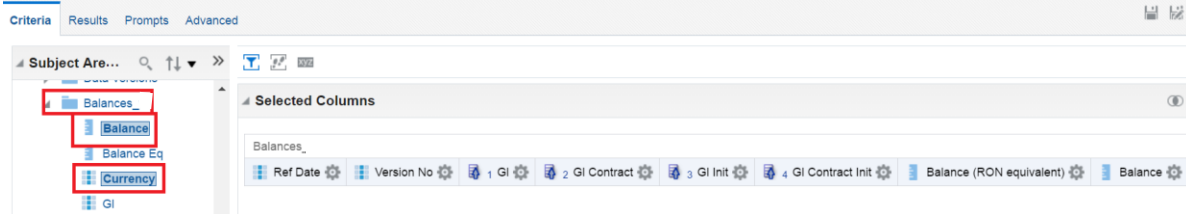
- 69. Save the Analysis.
- 70. Let's Clone this Analysis to a new one in order to display the Trial Balance grouped by currency, in original currency.
- 71. Click Save As



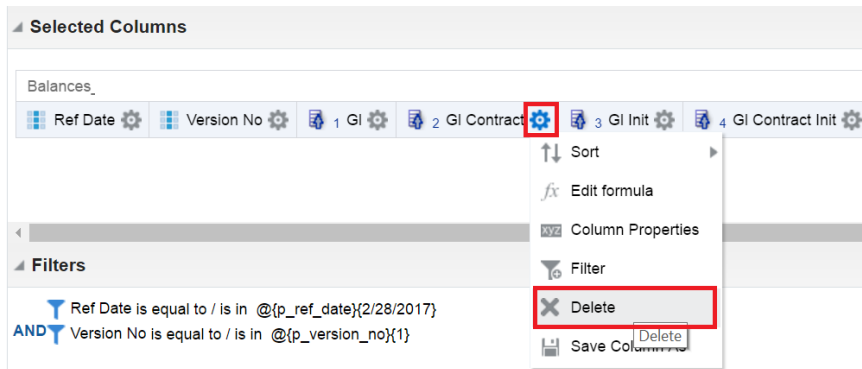
- 72. In the same folder, name it ending with \_Ccy



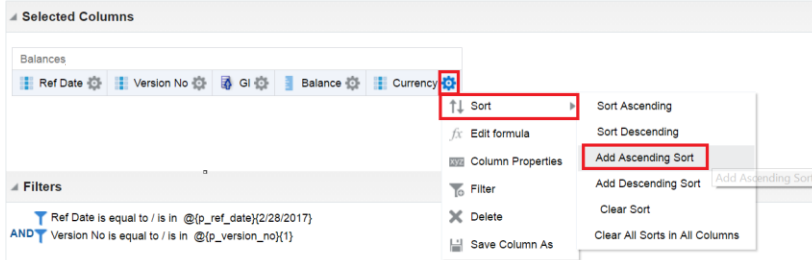
73. Click Ok
74. Go to Criteria
75. Double click on "Balance" and "Currency" columns from "Balances" in order to select them in the report



76. Delete columns GL Contract, GI Init, GI Contract Init, Balance(RON equivalent) from the view

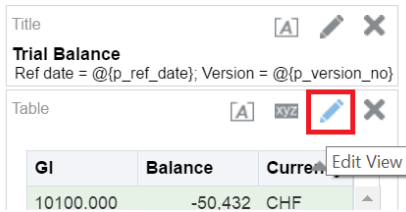


77. Sort by GL and Currency



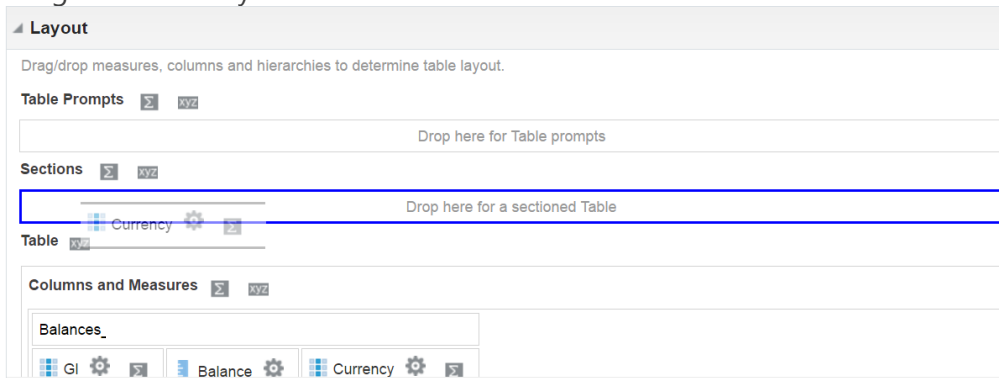
- 78. Click Save
- 79. Go to Results tab
- 80. Edit View

**Compound Layout**

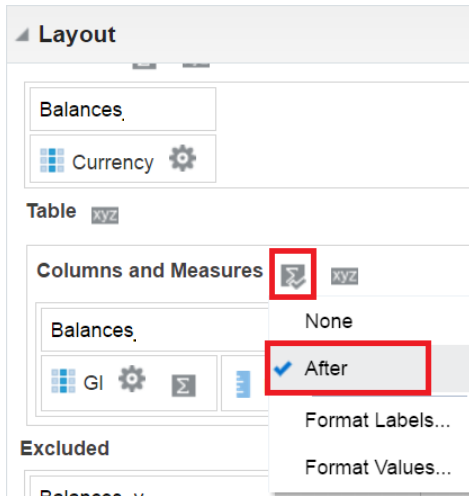


## Feature: Create Sections

- 81. Drag the "Currency" column in the Sections area



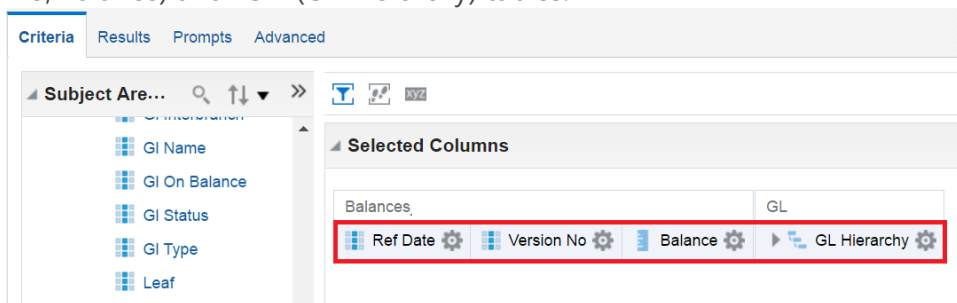
- 82. Add Totals after each Currency



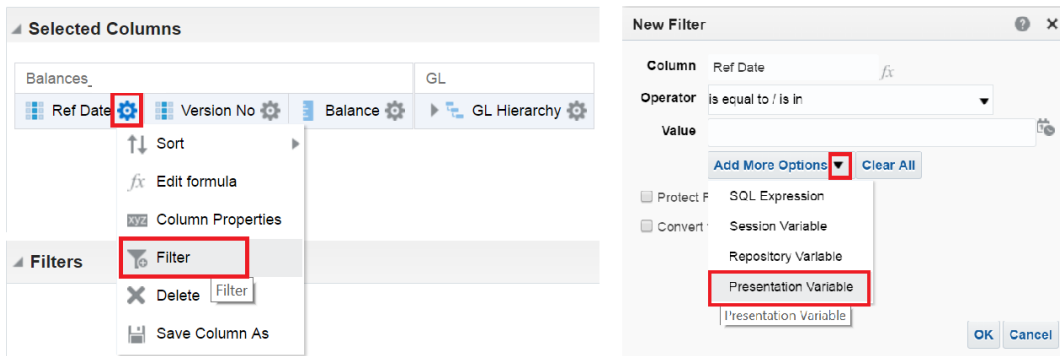
- 83. Click Done
- 84. Click Save

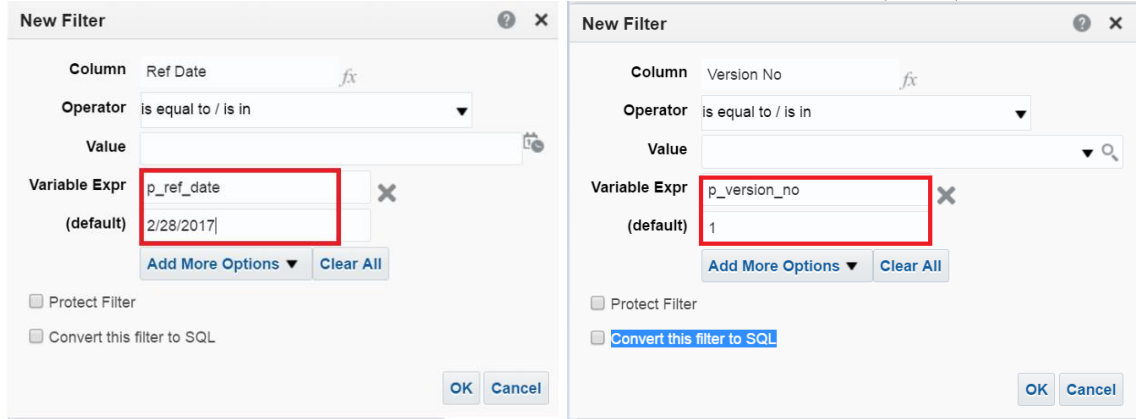
## Feature: Drill-Down based on Hierarchy

- 85. Click New → Analysis → ELITE
- 86. In "Criteria" tab, double click on the following columns from "Balances" (Ref date, Version No, Balance) and "GL" (GL Hierarchy) tables:



- 87. Add filter on "Ref Date" and "Version no"

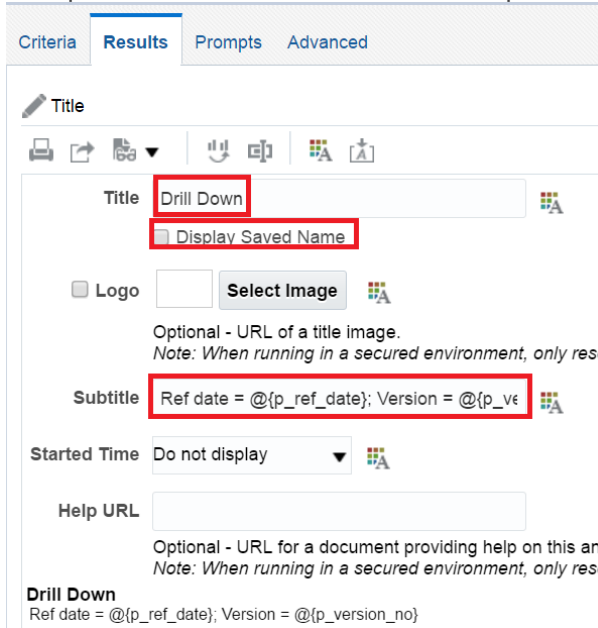




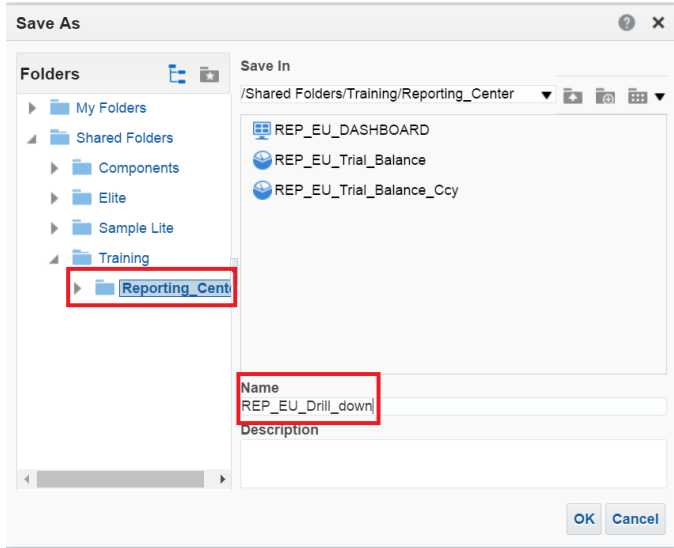
- 88. Click Ok
  - 89. Go to Results tab → Edit View
- Compound Layout**



- 90. Complete "Title" field with "Drill Down".
- 91. Uncheck "Display Saved Name"
- 92. Complete subtitle field: "Ref date = @{p\_ref\_date}; Version = @{p\_version\_no}"

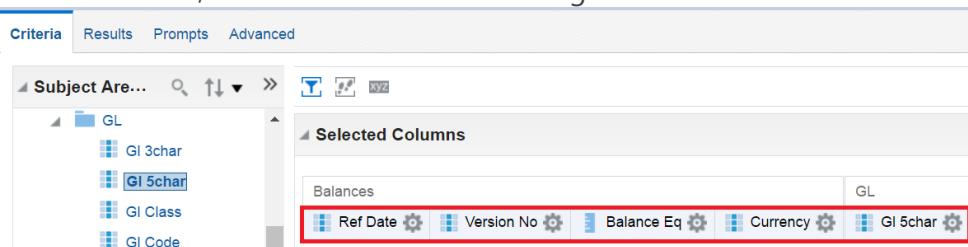


- 93. Click Done
- 94. Click Save
- 95. Name the analysis with Bank prefix \_ your initials \_Drill\_Down

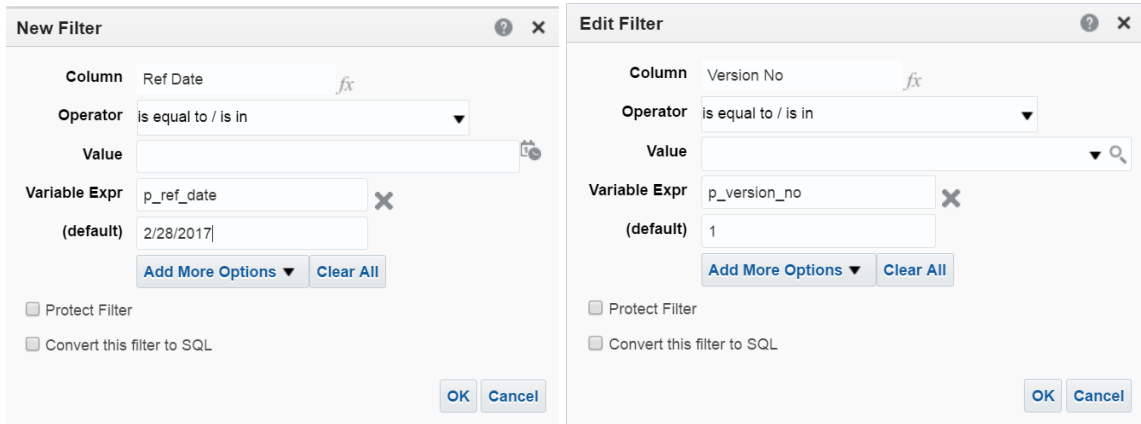


96. Click New → Analysis → ELITE

97. In "Criteria" tab, double click on the following columns from "Balances" and "GL" tables:



98. Add filter on "Ref Date" and "Version No":



99. Add filter on "Gl 5char" column:



**Selected Columns**

Balances_v	GL			
Ref Date	Version No	Balance Eq	Currency	GL 5char

**Filters**

Ref Date is equal to / is in @[p\_ref\_date]{2/28/2017}

AND Version No is equal to / is in @[p\_version\_no]{1}

**Context Menu:**

- Sort
- Edit formula
- Column Properties
- Filter**
- Delete
- Save Column As

100. Select "is LIKE (pattern match)" for Operator

**New Filter**

Column: GL 5char

Operator: is equal to / is in

Value: is equal to / is in, is not equal to / is not in, is less than, is greater than, is less than or equal to, is greater than or equal to, is between, is null, is not null, is ranked last, is ranked first, contains all, contains any, does not contain, begins with, ends with, **is LIKE (pattern match)**, is not LIKE (pattern match), is prompted

Protect

Convert

OK Cancel

101. Select Add More Options → SQL Expression

**Edit Filter**

Column: GL 5char

Operator: is LIKE (pattern match)

Value:

Add More Options  Clear All

Protect **SQL Expression**

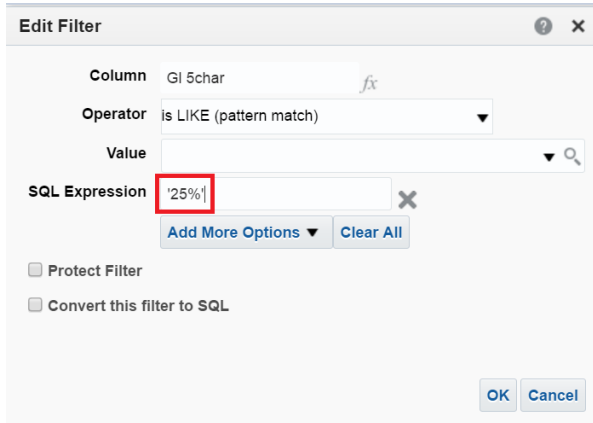
Convert Session Variable SQL Expression

Repository Variable

Presentation Variable

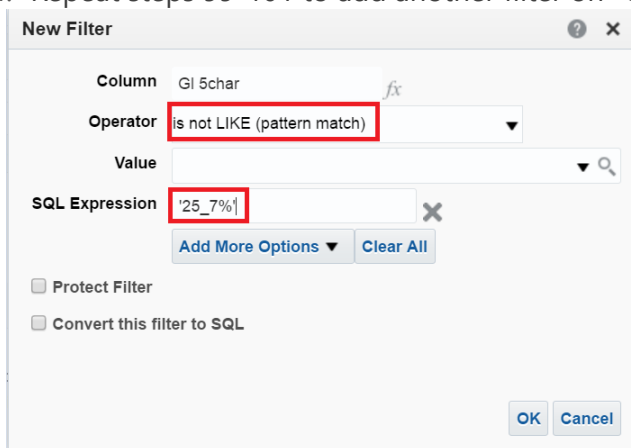
OK Cancel

102. Fill SQL Expression with '25%'

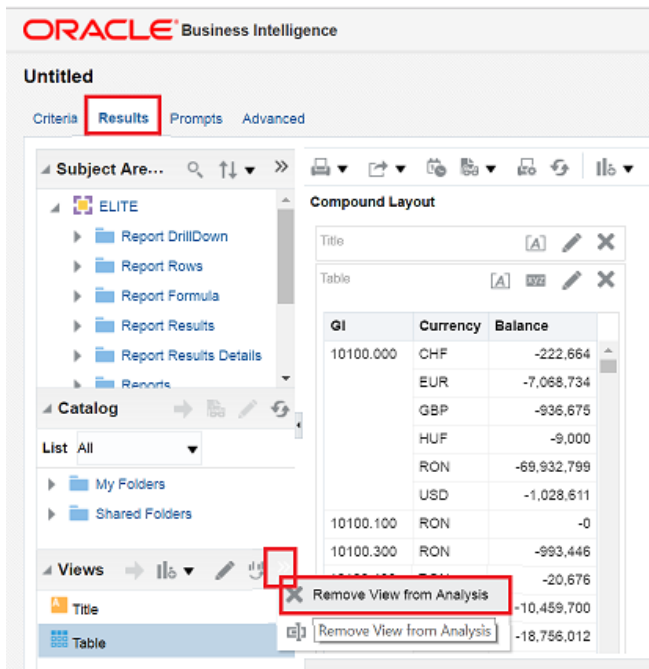


103. Click OK

104. Repeat steps 99-101 to add another filter on "GI 5char" as "GL 5char not Like '25\_7%'"

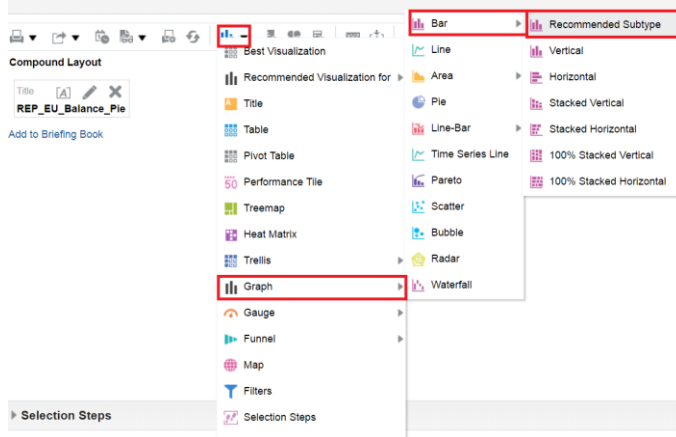


105. Go to Results tab and remove Table from Views Panel

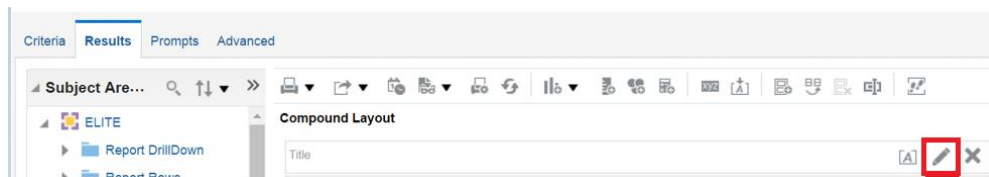


## Feature: Create Graph Object

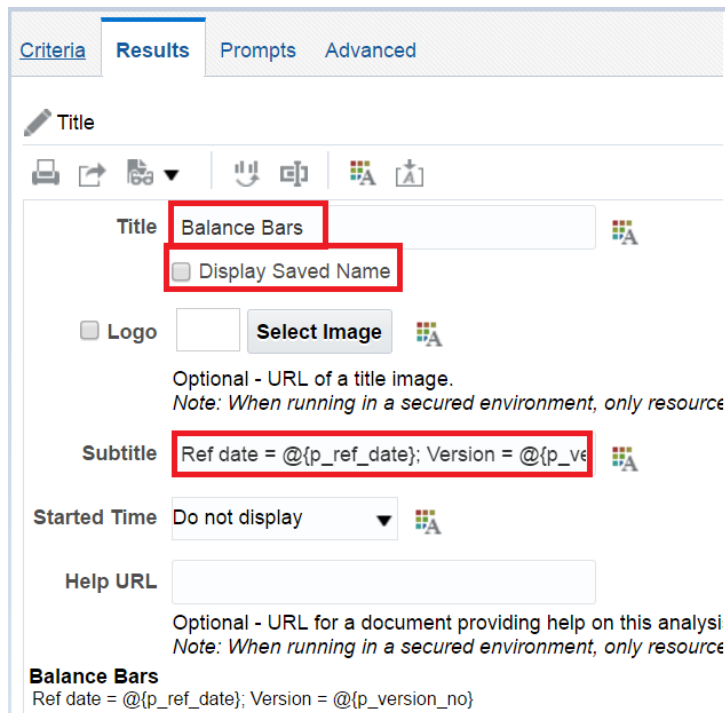
106. Click the "New View" → Graph → Bar → Recommended Subtype



107. Click on Edit button for Title field

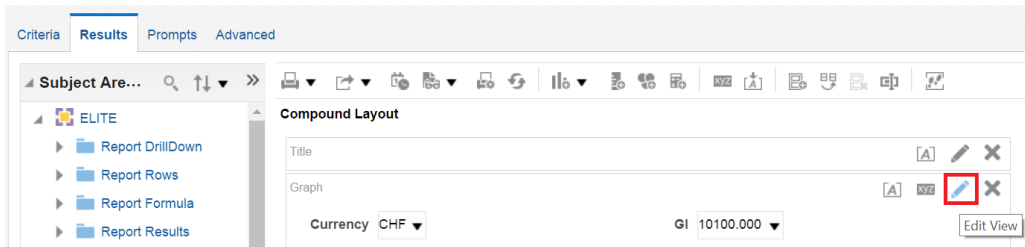


108. Fill Title and Subtitle fields as below.

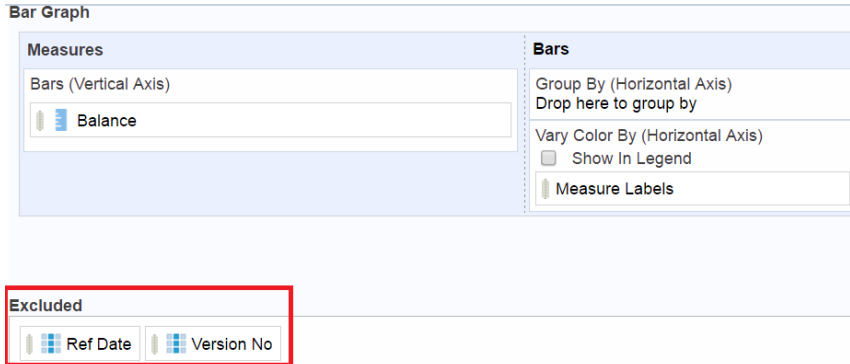


109. Click OK

110. Click "Edit View" button

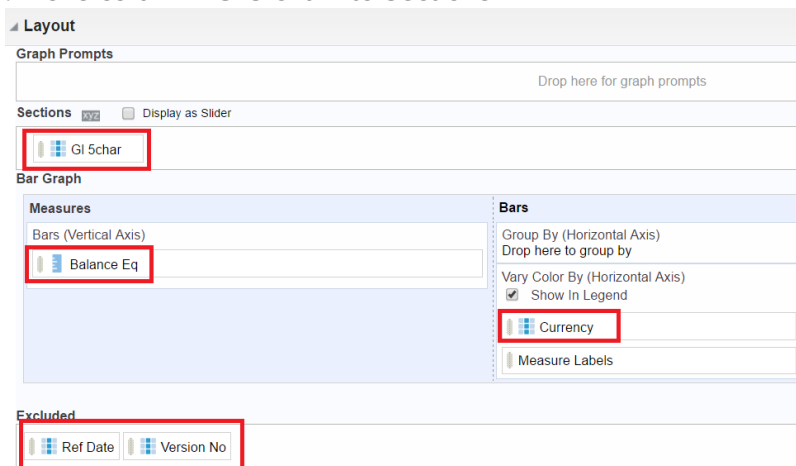


111. Move columns "Ref Date" and "Version No" to "Excluded" area



112. Move column "Currency" to Bars section → Vary Color By section. Check "Show in legend"

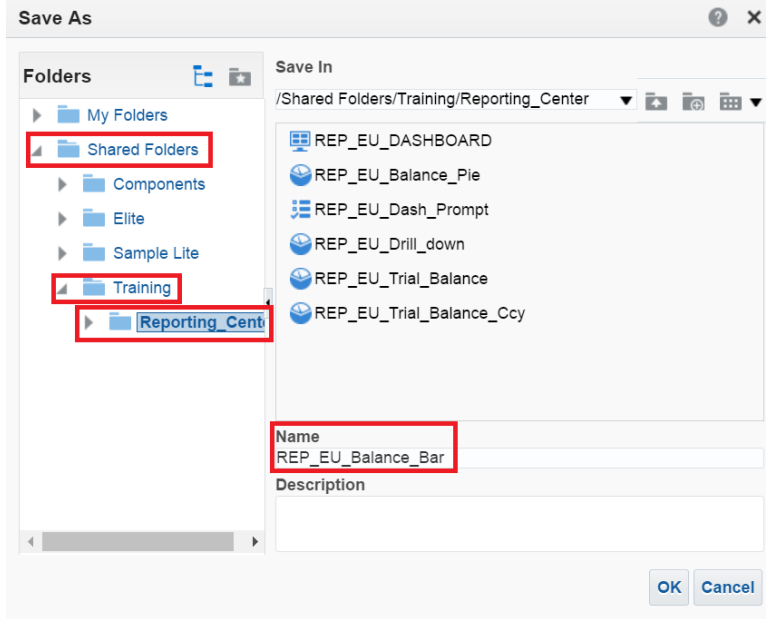
113. Move column "GI 5 char" to Sections



114. Click Done

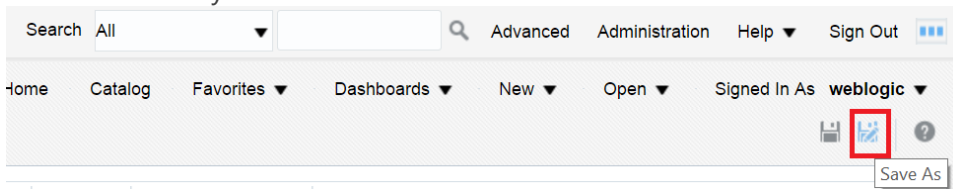
115. Click Save

116. Name analysis with "Prefix\_Balance\_Bar".

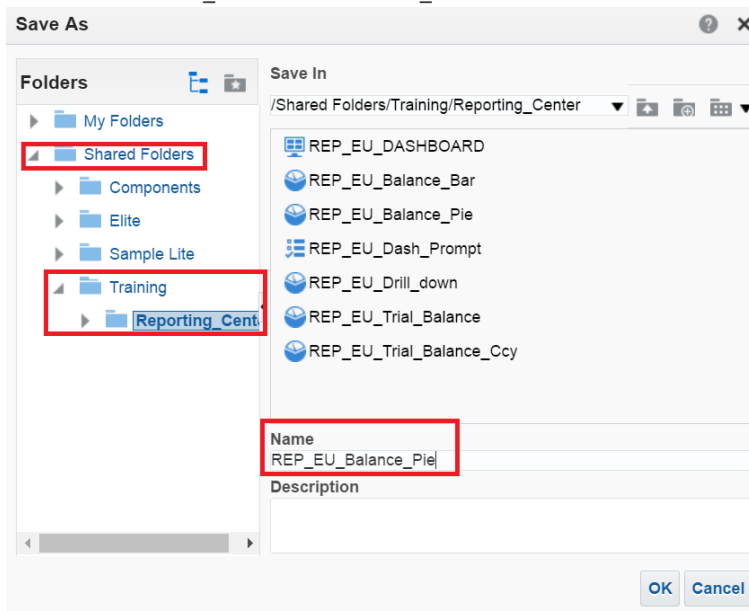


## Feature: Create Pie Object

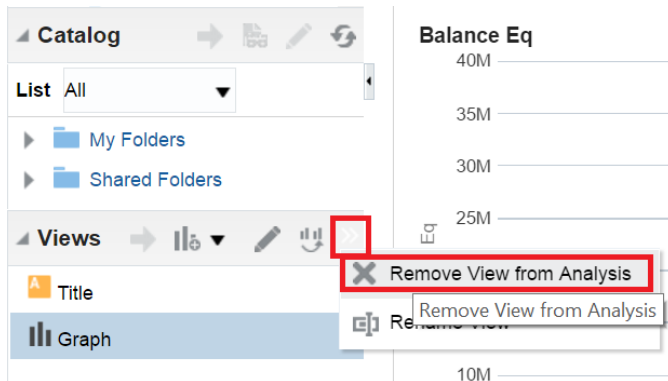
### 117. Clone last Analysis



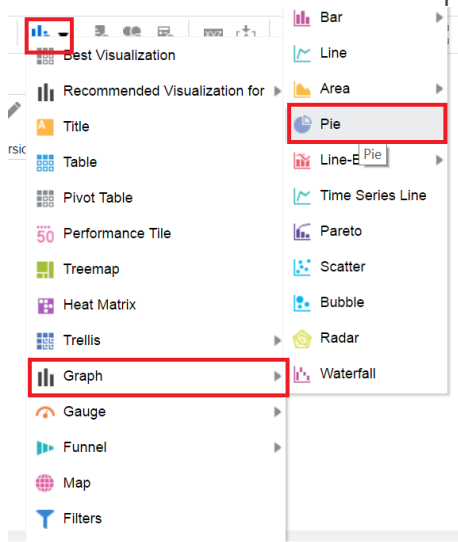
### 118. Name it with "\_Pie" instead of "\_Bar"



119. Go to Results tab → Views → select Graph → Show More buttons → Remove View from Analysis

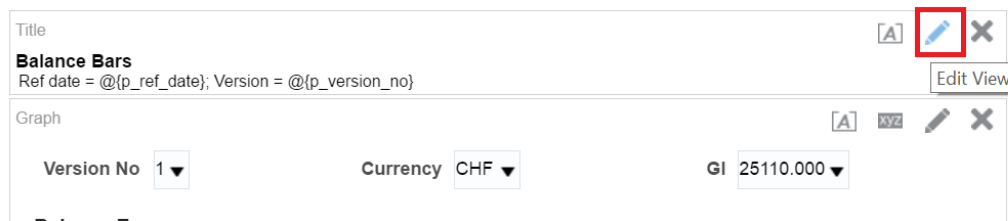


120. Add new Pie: New View → Graph → Pie



121. Rename Title to "Balance Pie"

**Compound Layout**



122. Edit View

Compound Layout

Title Balance Pie  
 Ref date = @[p\_ref\_date]; Version = @[p\_version\_no]

Graph Version No 1 Currency CHF GI 25110.000 Edit View

Balance Eq

- 123. Move "Ref Date" and "Version No" to Excluded area.
- 124. Move column "GI 5char" to "Sections", Balance eq to Slice Size and Currency to Slices:

Layout

Sections GI 5char  Display as Slider

Pie Graph

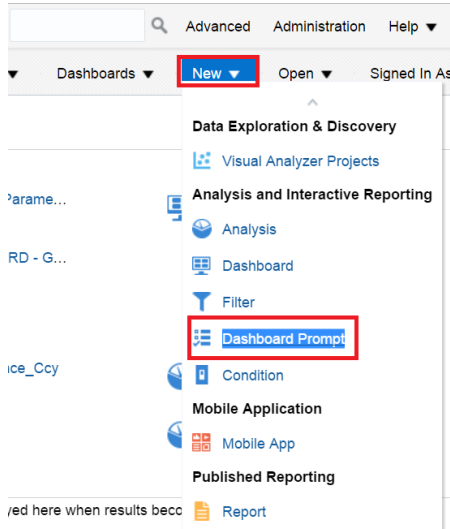
Measures	Pies and Slices
Slice Size <span>Balance Eq</span>	Pies Measure Labels
	Slices <input checked="" type="checkbox"/> Show In Legend Drop here for Slices <span>Currency</span>

Excluded  
Ref Date Version No

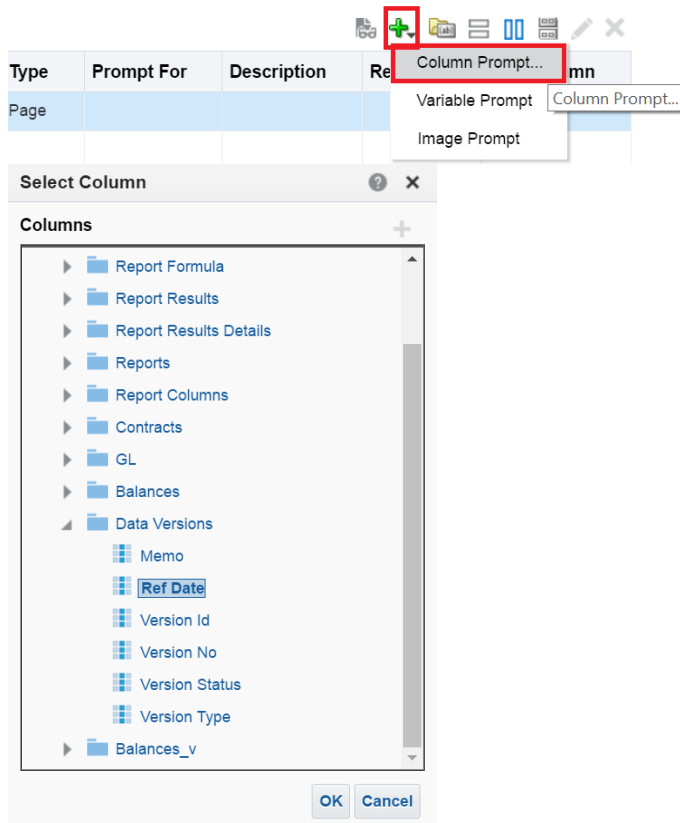
- 125. Click Done
- 126. Click Save Analysis

# Step 4: How to Create a Dashboard Prompt

127. Go to New → Dashboard Prompt → ELITE



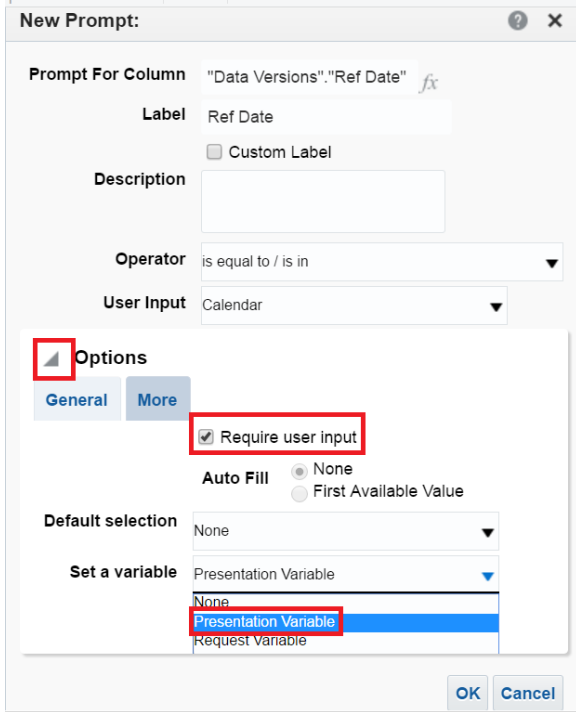
128. Click "+" button → Column Prompt → Data Versions → Ref Date



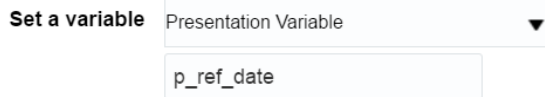
129. Click Ok



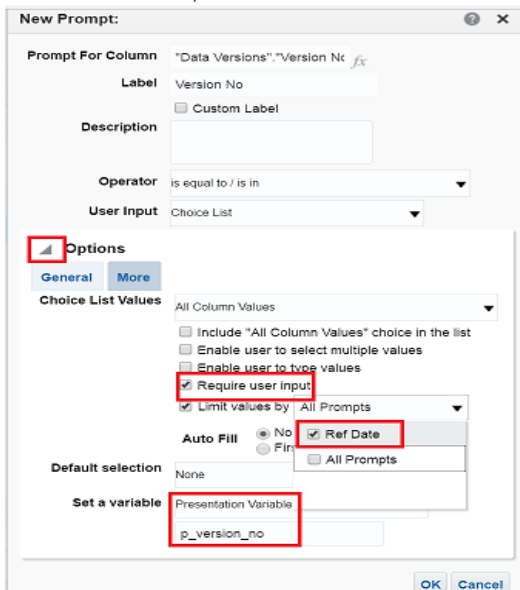
130. Expand Options section and check "Require user input".
131. From "Set a variable" menu, select "Presentation Variable"



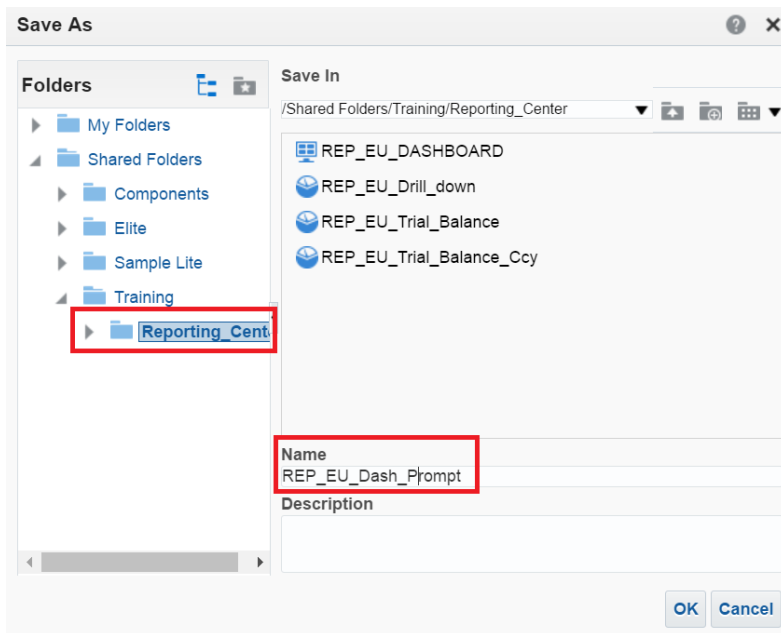
132. Set the Presentation Variable to p\_ref\_date



133. Click Ok
134. Repeat steps 128-131 for Data Versions → Version No column.
135. In addition, select "Ref Date" from "Limit values by" menu

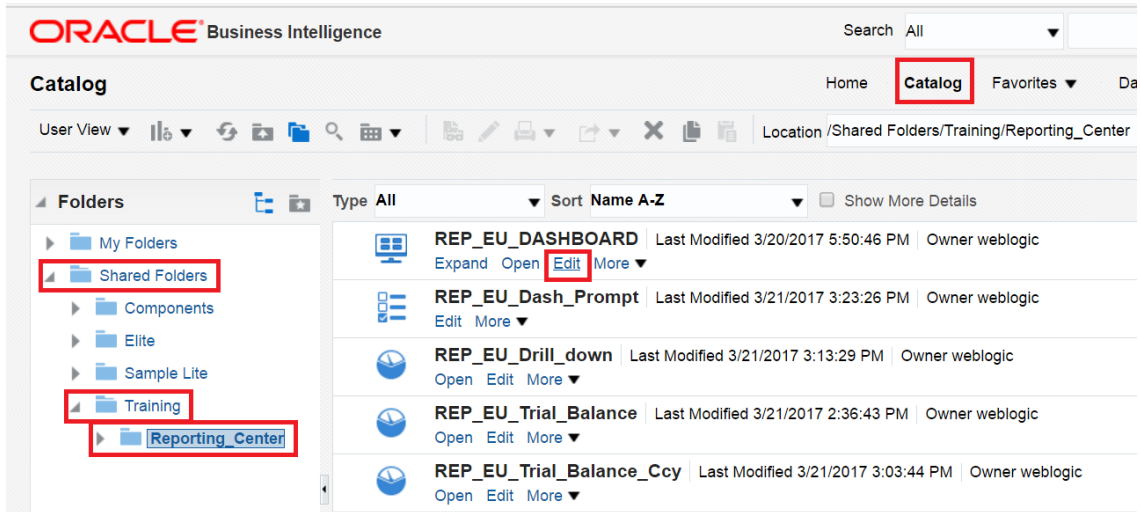


136. Click Save

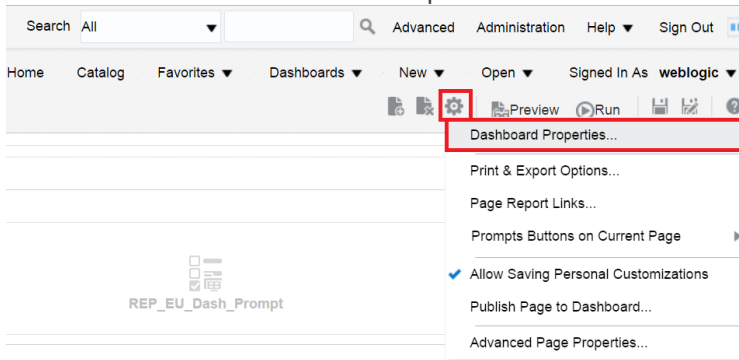


# Step 5: How to add items to a Dashboard

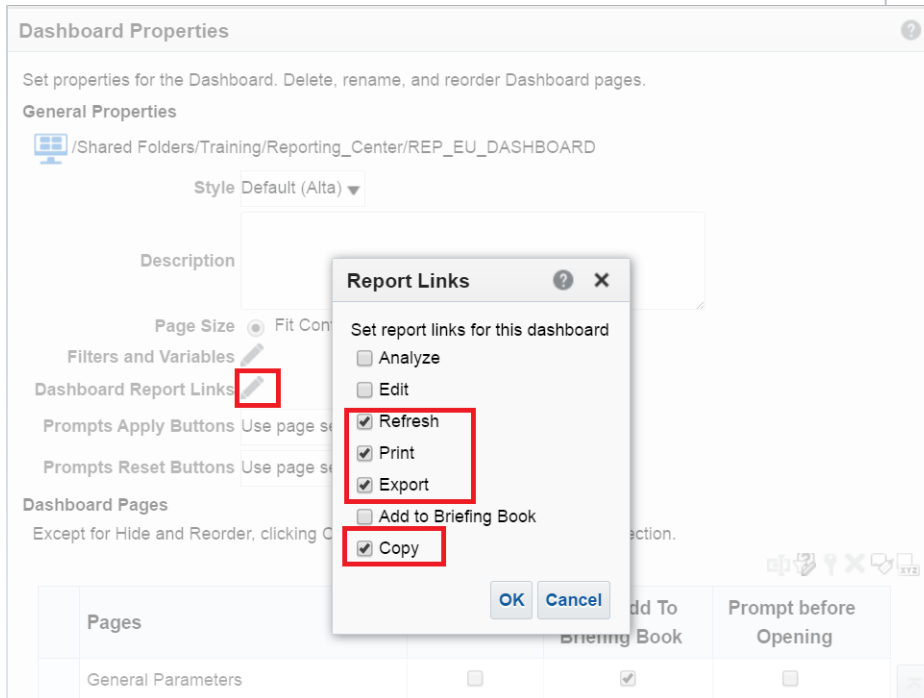
137. Go to Catalog → Shared Folders → Training → your folder
138. Click Edit on the Dashboard



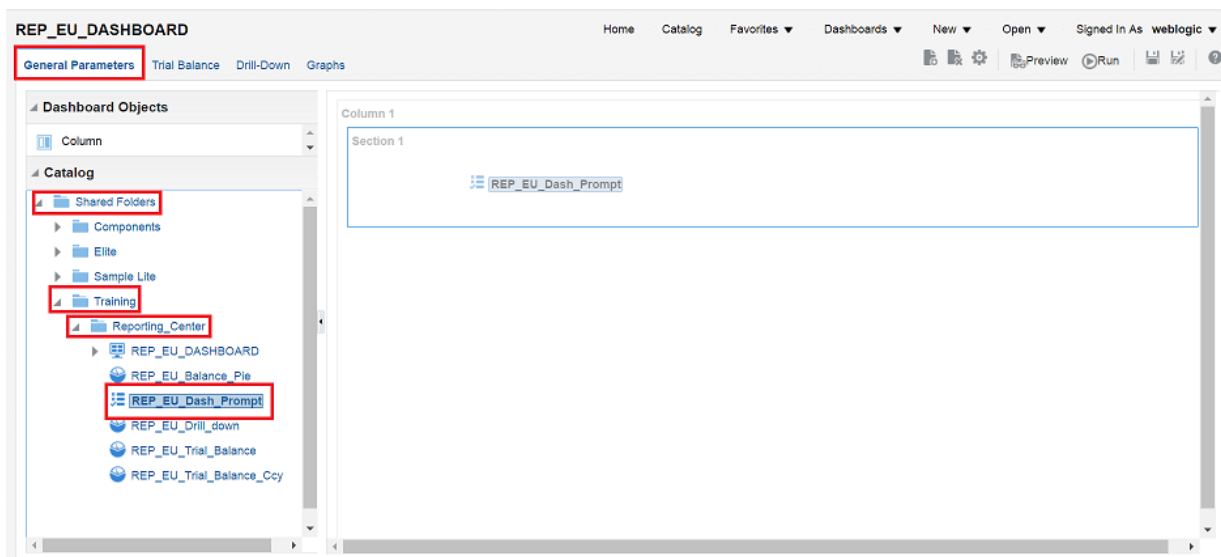
139. Click Tools → Dashboard Properties



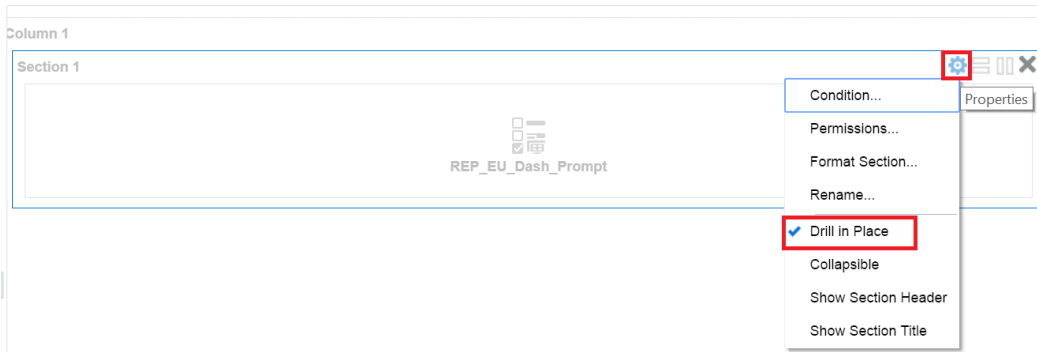
140. Click on Edit button near field "Dashboard Report Links"
141. Check Export, Copy, Refresh, Print



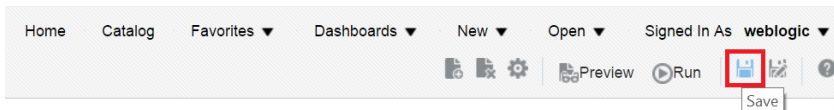
142. Click Ok
143. Click Save
144. Drag the Dashboard Parameter (\_Dash\_Prompt) in Section 1 from General Parameters tab



145. Click Section Properties → Drill in Place

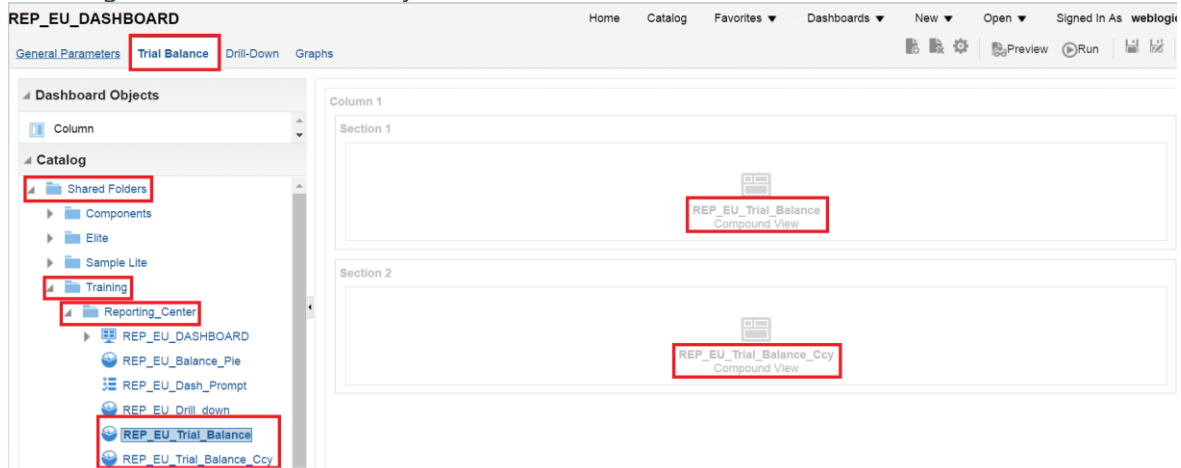


146. Click Save



147. Go to Trial Balance tab

148. Drag the Trial Balance Analyses, each in a Section



149. Check Drill in place for each section

150. Click Save

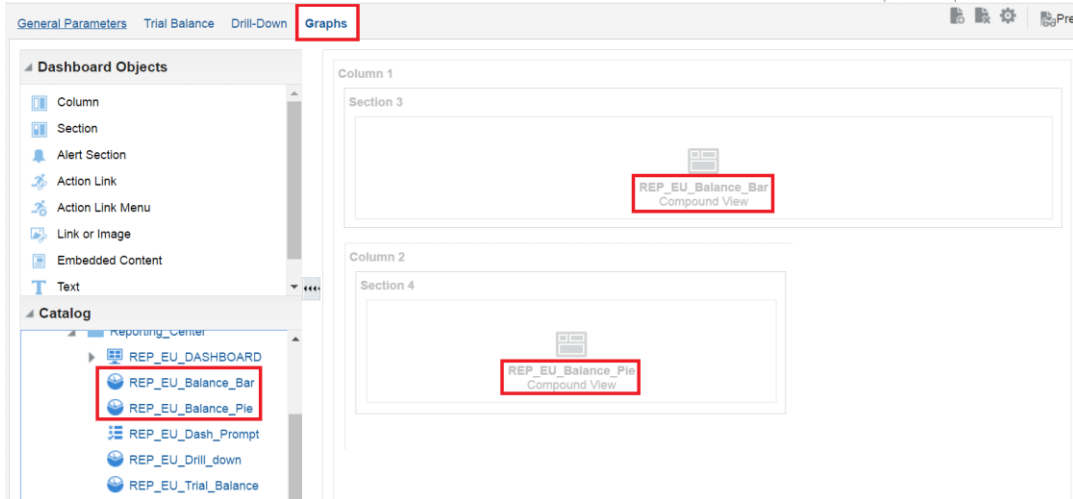
151. Go to Drill-Down tab

152. Drag the Drill-Down Analysis

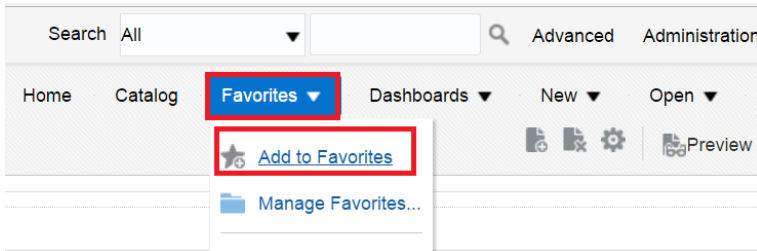
153. Check Drill in Place

154. Click Save

155. Go to Graphs tab and drag the \_Balance\_Bar and \_Balance\_Pie Analyses, each in a Section

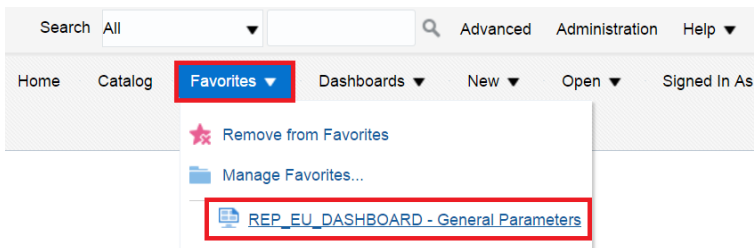


156. Click Save
157. Go to First tab
158. Click Favorites → Add to Favorites



## Review the results

159. Click on the Link to see the Results!



160. Go to "General Parameters" tab and select value "02/28/2017" for Ref Date and "1" for Version No
161. Click Apply button

**REP\_EU\_DASHBOARD**

**General Parameters** Trial Balance Drill-Down Graphs

\* Ref Date

\* Version No  ▼

**Apply** **Reset** ▼

162. Go to "Trial Balance" tab and check the Presentation Variables (Ref date and Version No):

**REP\_EU\_DASHBOARD**

General Parameters **Trial Balance** Drill-Down Graphs

**Trial Balance**  
Ref date = 02/28/2017, Version = 1

GI	GI Contract	GI Init	GI Contract Init	Balance (RON equivalent)
10100.000	10100.000	10100.000	10100.000	-21,093,692.19
10100.100	10100.100	10100.100	10100.100	-0.10
10100.300	10100.300	10100.300	10100.300	-288,290.00
10100.400	10100.400	10100.400	10100.400	-6,452.00

163. Export Results from "Trail Balance" tab to Excel

**REP\_EU\_DASHBOARD**

General Parameters **Trial Balance** Drill-Down Graphs

20219.000	20219.000	20219.000	20219.000	-89,561,954.23
20219.030	20219.030	20219.030	20219.030	-14,273,774.62
20219.050	20219.050	20219.050	20219.050	-301,571.56
20271.211	20211.000	20271.211	20211.000	-819,974.09
20271.211	20211.720	20271.211	20211.720	-110.04
20271.211	20211.750	20271.211	20211.750	-73.70
20271.211	20211.800	20271.211	20211.800	-443.36
20271.219	20219.000	20271.219	20219.000	-211,277.72
20271.219	20219.030	20271.219	20219.030	-41,485.54
20271.219	20219.050	20271.219	20219.050	-2,876.04
20272.211	20211.000	20272.211	20211.000	936,053.52
20272.219	20219.000	20272.219	20219.000	534,576.55
20272.219	20219.030	20272.219	20219.030	49,476.46
20272.219	20219.050	20272.219	20219.050	3,852.96
20272.219E	20219.000	20272.219E	20219.000	-184,396.89
20272.219E	20219.030	20272.219E	20219.030	-48,470.62

Refresh - Print **Export** Copy

164. Drill-Down the hierarchy in the third tab

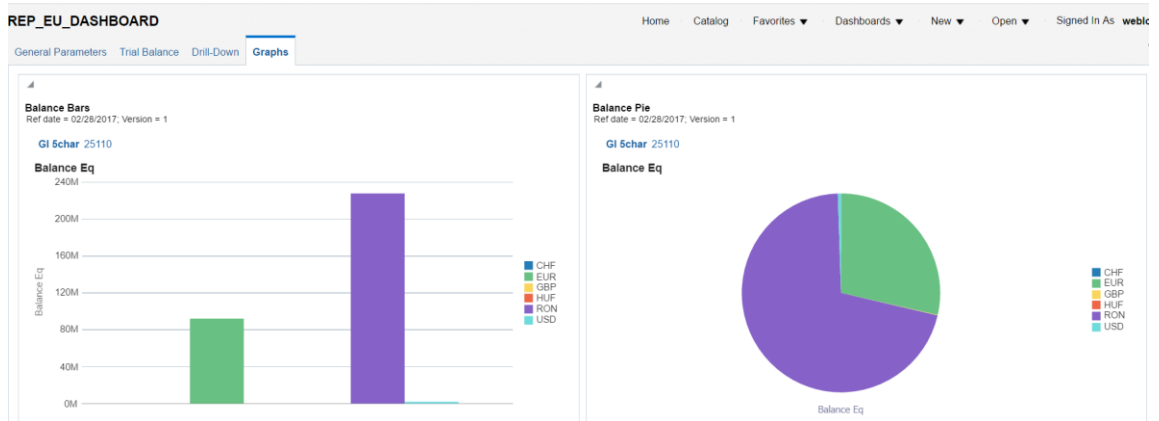
**REP\_EU\_DASHBOARD**

General Parameters Trial Balance **Drill-Down**

**Drill-Down**  
Ref date = 02/28/2017; Version = 1

GL Hierarchy	Balance
▲ Total	0
▲ 101	-15,140,939
▲ 10100	-15,140,939
10100.000	-14,846,197
10100.100	-0
10100.300	-288,290
10100.400	-6,452
▲ 102	-1,592,720
▲ 10200	-1,592,720
10200.000	-1,592,720
▲ 111	-96,383,656
▲ 11110	-96,383,656
11110.000	-93,831,435
11110.000	-2,552,221

165. Analyse graphs from last tab





## Ready to get started?

We hope you enjoy working with OBIEE Platform!

Sincerely,

**Elena Unciuleanu & Reporting Center Team**

Contact me at: [elena.unciuleanu@reportingcenter.ro](mailto:elena.unciuleanu@reportingcenter.ro)

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## Learn More

Keep going. There are lots more new features and ways to work in OBIEEs. Check out our training materials & manuals to dive right in.

[http://reportingcenter.ro/docs/OBIEE\\_Training\\_Material\\_5thApril2017.pdf](http://reportingcenter.ro/docs/OBIEE_Training_Material_5thApril2017.pdf)