

Course ID: BI 021
Course: Reporting Capabilities (View Only)

Ground Rules



Be on time



Attendance



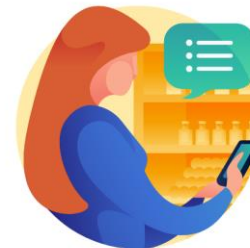
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

Course Overview

Course Description

This course provides a comprehensive review of INFORMS Business Intelligence.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: INFORMS BI Processes
 - INFORMS BI Basics
 - Dashboards and Reports
 - Personalization and Finding Help
- Module 3: Course Summary

Course Overview, Continued

Training Audiences	<ul style="list-style-type: none">• Executive User• Central Procurement User• Central Finance User• Procurement User• Payables User• Budgetary Control User• Fixed Assets User• General Ledger User• Projects User• Receivables User
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help
Other related Courses	<ul style="list-style-type: none">• N/A
Estimated Duration	<ul style="list-style-type: none">• 4 Hours

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

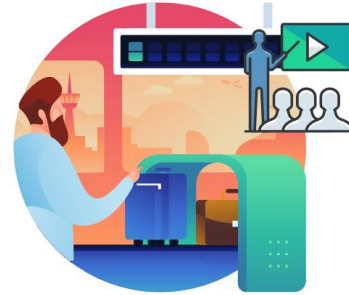
Purpose and Benefits of Analytics

Introduction to Demonstrations, Activities, and Exercises

Course Administration and Logistics



To receive credit for completing this course, Users must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

Learning Objectives

- Understand the purpose of INFORMS Business Intelligence
- Use the Global Header
- Understand the functionality of a dashboard and a report
- Understand prompts and use prompt capabilities to filter report data
- Understand hierarchy drilldowns and guided navigation between dashboard pages
- Understand available report features
- Understand the different report and graph types
- Manipulate report columns on a dashboard
- Use different print and export options
- Set default prompts on a dashboard page
- Set a landing page
- Clear personalization

Roles and Responsibilities

The roles and responsibilities associated with INFORMS BI:

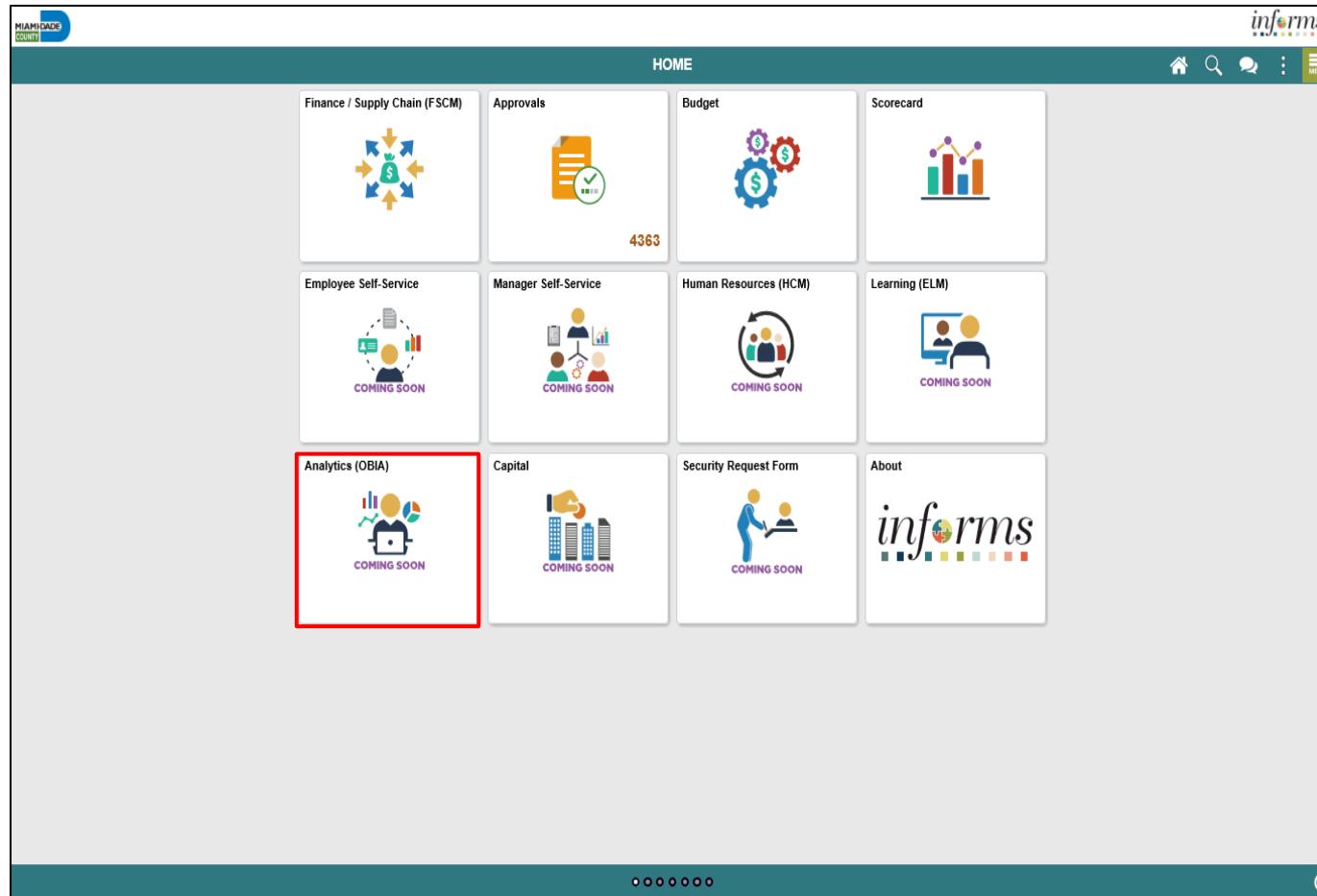
Role	Responsibilities
Executive User	The Executive User is responsible for reviewing all dashboard reports for all BU's.
Central Procurement User	The Central Procurement User is responsible for reviewing Procurement dashboard reports for all BU's.
Central Finance User	The Central Finance User is responsible for reviewing Finance dashboard reports for all BU's.
Procurement User	The Procurement User is responsible for reviewing Procurement dashboard reports.
Payables User	The Payables User is responsible for reviewing Payable's dashboard reports.
Budgetary Control User	The Budgetary Control User is responsible for reviewing Budgetary Control dashboard reports.
Fixed Assets User	The Fixed Assets User is responsible for reviewing Fixed Assets dashboard reports.
General Ledger User	The General Ledger User is responsible for reviewing General Ledger dashboard reports.
Projects User	The Projects User is responsible for reviewing Projects dashboard reports.
Receivables User	The Receivables User is responsible for reviewing receivables dashboard reports.

Navigation

Please note the dashboards and reports viewable in INFORMS Business Intelligence depend on the permissions assigned to the employee. The navigations in this training are examples; not all employees in INFORMS BI will have access to both Finance and Procurement subject areas.

Navigation Continued...

1. Login to the INFORMS and select **Analytics (OBIA)** from the home landing page.



Navigation Continued...

2. After selecting Analytics (OBIA), the INFORMS Business Intelligence home page will open. From the screen pictured below, navigate to dashboards and reports.

ORACLE Business Intelligence

Search All [] [] Advanced Administration Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As T0140725

Create...

- Analysis and Interactive Reporting
Analysis Dashboard More
- Mobile Application
Mobile App
- Published Reporting
Report Report Job More
- Actionable Intelligence
Agent Action
- Performance Management
Scorecard KPI KPI Watchlist
- Marketing
Segment Segment Tree List Format

Jobs

- Report Jobs
- Report Job History

Recent

Dashboards

- General Ledger - Overview
Open Edit More
- Spend Analyzer - Spend by...
Open Edit More
- Spend Analyzer - Spend by...
Open Edit More
- Procurement - Overview
Open Edit More
- Procurement - Supplier Per...
Open Edit More

More Dashboards

Others

- Spend Trend by Top Categ...
Open Edit More
- Spend by Top Categories
Open Edit More
- Spend by Item
Open Edit More
- Spend Transactions
Open Edit More

Most Popular

No recommendations are currently available. Most Popular items will be displayed here when results become available.

Download BI Desktop Tools

Navigation: Financials

The **General Ledger Dashboard** contains the following tabs:

- Overview
- Balance Sheet
- Budget vs. Actual
- GL Balance
- Trial Balance

The screenshot displays the Oracle Business Intelligence General Ledger dashboard. At the top, there are navigation tabs: Overview, Balance Sheet, Budget vs. Actual, GL Balance, and Trial Balance. The main area is divided into three sections:

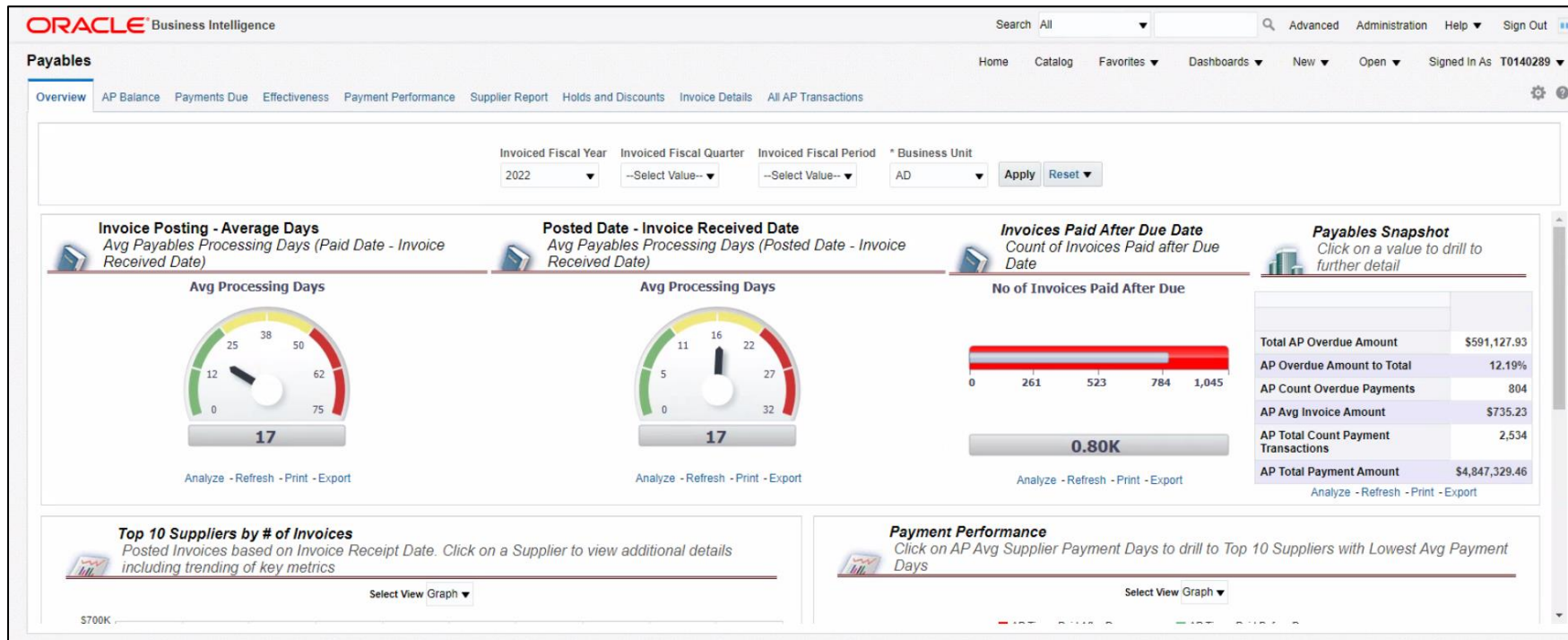
- Fund and Grant Balances by Account Type:** A table showing financial data for fiscal year 2022, quarter 3, period 08. It lists various account types like ASSETS, REVENUES, and EXPENDITURES with their respective amounts.
- Summary Balances by Account Type:** A pie chart showing the distribution of transaction amounts across ASSETS (45.44%), LIABILITIES (39.55%), EQUITY (4.56%), and REVENUES (10.45%).
- Department Balances by Account Structure:** A table listing transactions by department (e.g., AD01010000), fund code (G3002), and account type (ASSETS, LIABILITIES, EXPENDITURES).

Filters at the top include Fiscal Year (2022), Fiscal Quarter (2022 Q 3), Fiscal Period (2022 / 08), Ledger Group (ACTUALS), Fund Type, Fund Rollup, and Fund. There are also dropdowns for Department Number, Grant, Account Type, Account Character, and Account Object.

Navigation: Financials, Continued...

The **Payables** Dashboard contains the following tabs:

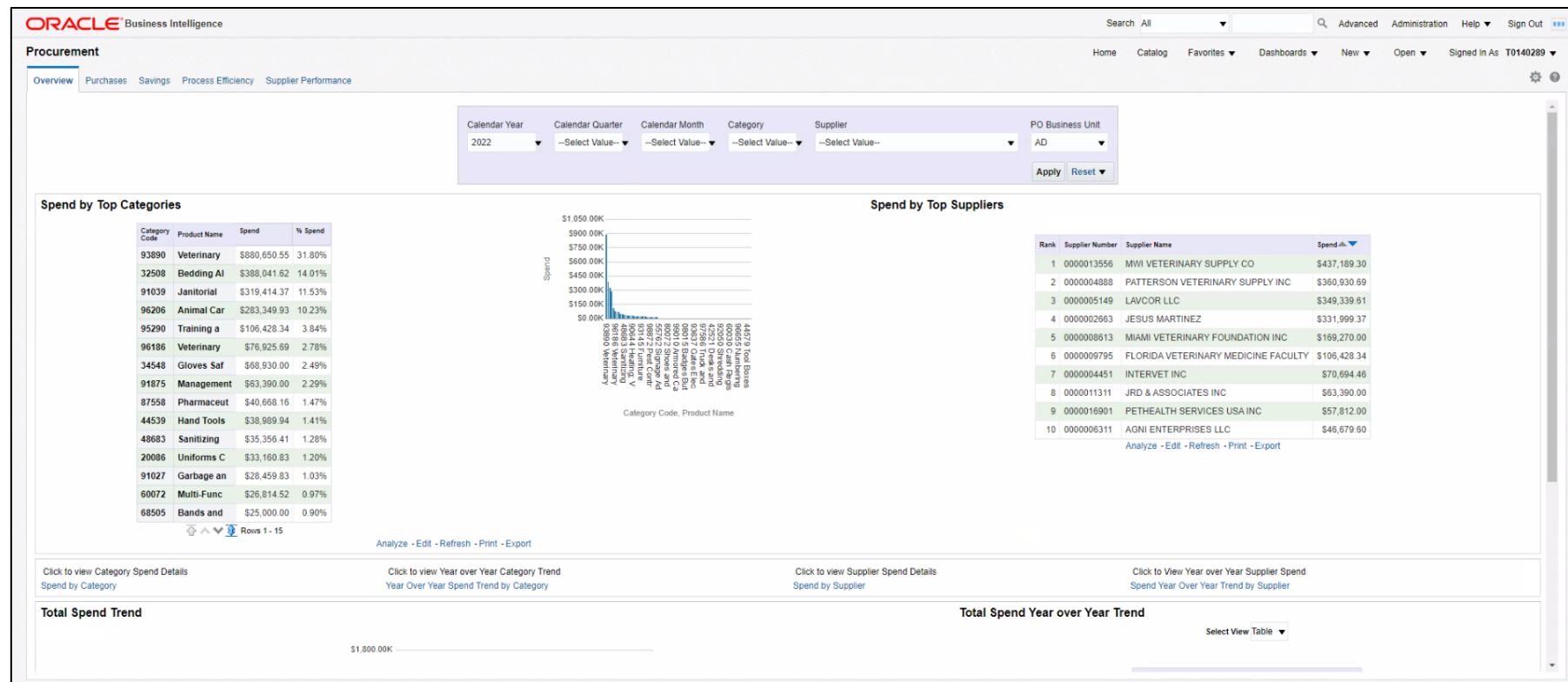
- Overview
- AP Balance
- Payments Due
- Effectiveness
- Payment Performance
- Supplier Report
- Holds and Discounts
- Invoice Details
- All AP Transactions



Navigation: Procurement

The **Procurement** Dashboard contains the following tabs:

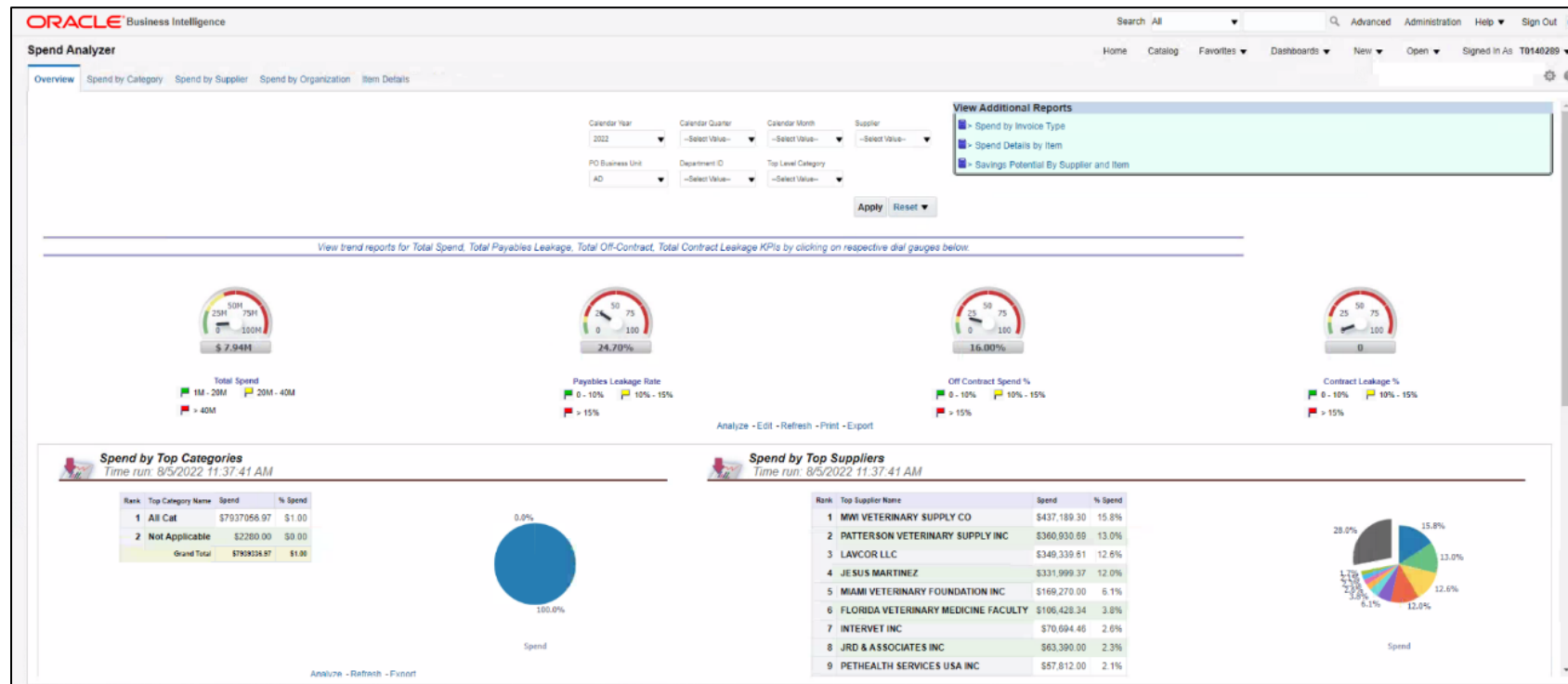
- Overview
- Purchases
- Savings
- Process Efficiency
- Supplier Performance



Navigation: Procurement, Continued...

The **Spend Analyzer** Dashboard contains the following tabs:

- Overview
- Spend by Category
- Spend by Supplier
- Spend by Organization
- Item Details



Purpose and Benefits to Analytics

OBIA (Oracle Business Intelligence Applications)

- INFORMS BI is a multi-purpose interactive dashboard and reporting tool that utilizes OBIA.
- It allows users to create reports by dragging and dropping columns from pre-defined subject areas.
- Report and Dashboard creation does not require coding and can be done using a web interface.
- OBIA is a package that is installed on top of the INFORMS BI solution to provide standardized ERP reporting.
- It provides a set of delivered Dashboards and Reports based on the functional areas an organization is implementing within their ERP system.
- Oracle provides the ETL and Metadata mapping logic to simplify the data transfer and reporting process. Similar reporting would take much longer if it were entirely custom from the ground up.

What Business Intelligence is NOT

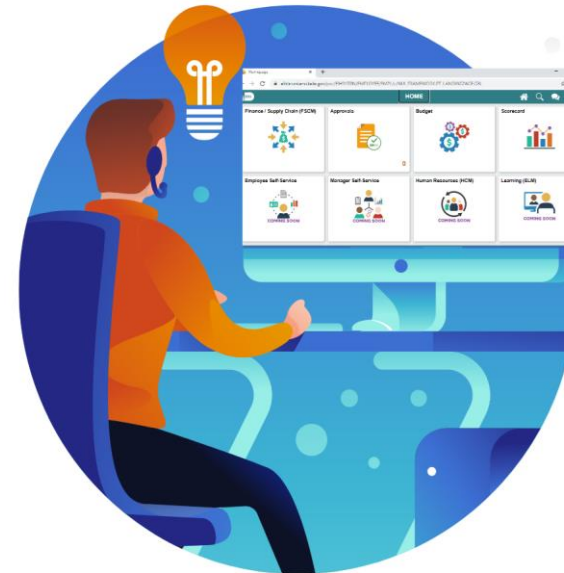
- Detail transactional reports. This type of reporting is found within INFORMS queries and reports.
- Real time reporting. OBIA is updated on a nightly basis any transactions created and posted during the day will not be available until the next day.

Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of Analytics

Introduction to Demonstrations, Activities, and Exercises

Module 2: INFORMS BI Process

Module Topics

Module Introduction

Lesson 1: INFORMS BI Basics

Lesson 2: Dashboards and Reports

Lesson 3: Personalization and Finding Help

Lesson 1: INFORMS Basics

At the conclusion of this lesson, you will be able to:

- Understand the purpose of INFORMS Business Intelligence
- Use the Global Header
- Understand the functionality of a dashboard and a report

Lesson 1: Key Terms

Term	Definition
Dashboard	A structure that organizes analytical content (e.g., reports, links, visualizations). The content on a Dashboard is usually displayed as a report targeted to users.
Global Header	A list of links at the top of INFORMS BI that is always available as you work. It allows easy access to INFORMS BI functionality. For example, Home page, access dashboards, open objects (such as analyses and dashboard prompts), and so on, are displayed.
INFORMS Business Intelligence (BI)	A tool created using OBIA (Oracle Business Intelligence Applications). It focuses on easy access to information to improve information sharing across a wide range of audiences through self-service reporting and analysis. It is made up of Dashboards and Reports with analytical content.
OBIA (Oracle Business Intelligence Applications)	The technology behind the INFORMS BI Solution.
Report	An analysis displayed as a table or graphic based on a data set.
Dashboard	A structure that organizes analytical content (e.g., reports, links, visualizations). The content on a Dashboard is usually displayed as a report targeted to users.

Lesson 1: INFORMS BI Basics

INFORMS Business Intelligence is a tool that:

- Provides easy access to information across a wide range of audiences through self-service reporting and analysis (Finance and Procurement).
- Empowers executive, managerial, and select Department operational staff to make data driven, fact-based decisions using Key Performance Indicators (KPIs) focused on outcomes.
- Provides transparent access to data.

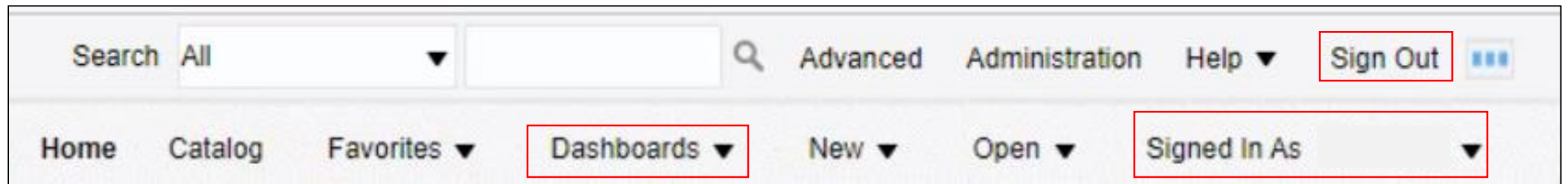
Lesson 1: INFORMS BI Basics, Continued...

- This training teaches the navigation and general use of the INFORMS BI Solution.
- For more information about INFORMS BI, see additional training materials on the INFORMS website.
- There is typically a one-day interval between the time the data is posted in INFORMS and the time the data is posted in INFORMS BI.
- INFORMS BI will grow and expand to include more reports and subject areas.

Lesson 1: INFORMS BI Basics, Continued...

Once logged in, the **Global Header** provides quick access to commonly used functions:

- **Dashboards**
- **Signed In As**
- **Sign Out**



Lesson 1: INFORMS BI Basics, Continued...

- A **Dashboard** is a structure that organizes analytical content.
- The content on a **Dashboard Page** is usually displayed as one or more reports.
- Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Financials > General Ledger**

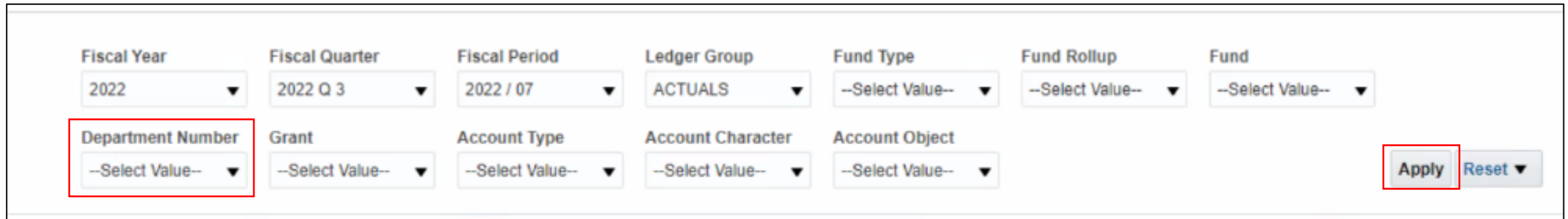
The screenshot displays the Oracle Business Intelligence General Ledger dashboard. At the top, there are navigation tabs for 'Overview', 'Balance Sheet', and 'Trial Balance'. Below this, a series of filters are provided for Fiscal Year (2022), Fiscal Quarter (2022 Q 3), Fiscal Period (2022 / 07), Ledger Group (ACTUALS), Fund Type, Fund Rollup, Fund, Department Number, Grant, Account Type, Account Character, and Account Object. The dashboard is divided into three main sections:

- Total Expenses Trend:** A table showing cumulative expense amounts over time, with columns for Fiscal Year, Fiscal Period, Fund Code, Grant Code, Grant Description, Account Type, and Amount.
- Expenses by Category:** A table showing the breakdown of expenses by account type (ASSETS, LIABILITIES, EQUITY, REVENUES, EXPENDITURES) for the fiscal year 2022 and period 2022 / 07. A pie chart below this table shows the distribution of these categories.
- Top 10 Department ID by Expenses:** A table listing the top 10 departments by expense amount, including Department ID, Fund Code, Account Type, Character, and Currency.

Lesson 1: INFORMS BI Basics, Continued...

The **Prompts** at the top of each dashboard can filter through the required reports.

Note: Prompts vary based on the dashboard selection.

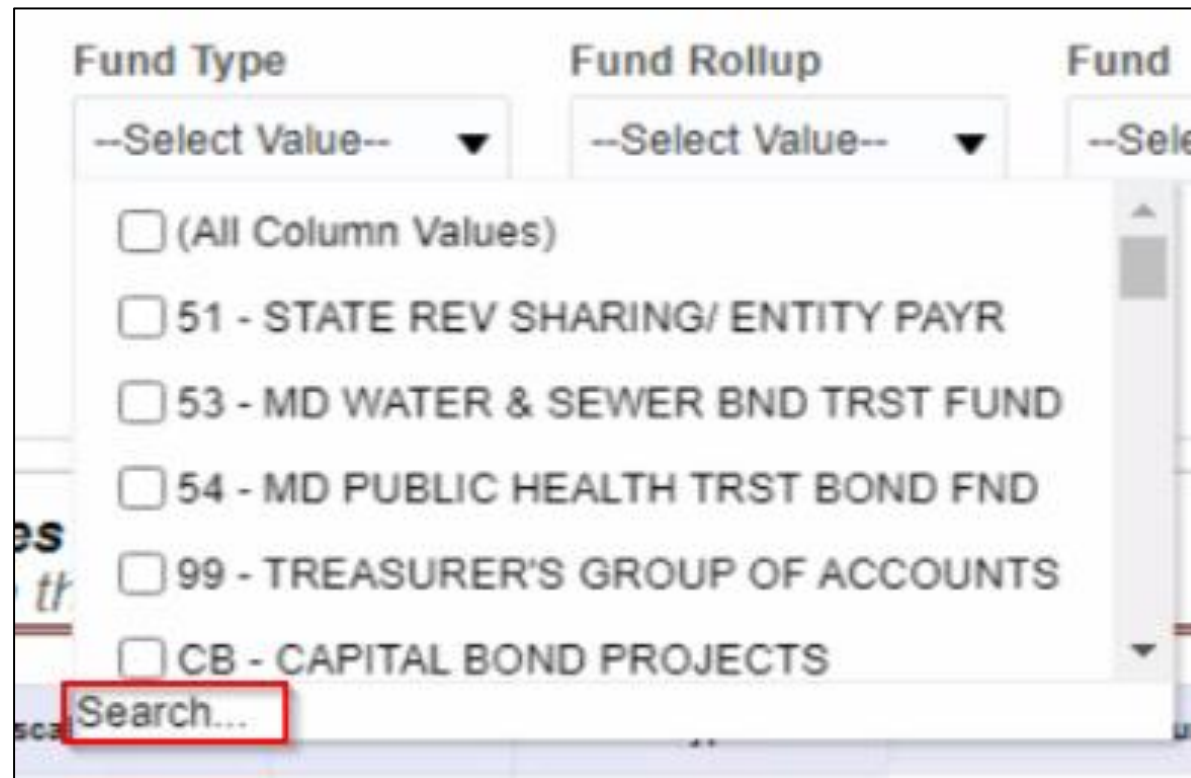


The screenshot displays a filter interface with the following elements:

- Fiscal Year:** 2022
- Fiscal Quarter:** 2022 Q 3
- Fiscal Period:** 2022 / 07
- Ledger Group:** ACTUALS
- Fund Type:** --Select Value--
- Fund Rollup:** --Select Value--
- Fund:** --Select Value--
- Department Number:** --Select Value-- (highlighted with a red box)
- Grant:** --Select Value--
- Account Type:** --Select Value--
- Account Character:** --Select Value--
- Account Object:** --Select Value--
- Buttons:** Apply (highlighted with a red box) and Reset

Lesson 1: INFORMS BI Basics, Continued...

Use the **Search** option within each prompt to drilldown further search results.



The screenshot shows a web application interface with three dropdown menus: "Fund Type", "Fund Rollup", and "Fund". Each dropdown menu currently displays "--Select Value--". The "Fund" dropdown menu is open, showing a list of fund categories with checkboxes:

- (All Column Values)
- 51 - STATE REV SHARING/ ENTITY PAYR
- 53 - MD WATER & SEWER BND TRST FUND
- 54 - MD PUBLIC HEALTH TRST BOND FND
- 99 - TREASURER'S GROUP OF ACCOUNTS
- CB - CAPITAL BOND PROJECTS

At the bottom of the dropdown menu, there is a search input field labeled "Search..." which is highlighted with a red box.

Lesson 1: INFORMS BI Basics, Continued...

A **Report** is an analysis displayed as a table or visualization based on a data set. There can be multiple reports placed on one **Dashboard Page**.

The screenshot displays the Oracle Business Intelligence interface for a General Ledger report. It includes a search bar, navigation links (Home, Catalog, Favorites, Dashboard), and a filter section with dropdown menus for Fiscal Year (2022), Fiscal Quarter (2022 Q 3), Fiscal Period (2022 / 07), Ledger Group (ACTUALS), Fund Type, Fund Rollup, Department Number, Grant, Account Type, Account Character, and Account Object.

Two report sections are highlighted with red boxes:

- Total Expenses Trend:** A table showing cumulative expense amounts for various categories.
- Expenses by Category:** A table showing transaction amounts for ASSETS, LIABILITIES, and EQUITY, accompanied by a pie chart.

Fiscal Year	Fiscal Period	Fund Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 / 07	51001 - GAS TAXES	NO-GRANT	NO GRANT	REVENUES	-\$6,666,822.85
2022	2022 / 07	51001 - GAS TAXES	NO-GRANT	NO GRANT	EXPENDITURES	\$6,666,822.85
2022	2022 / 07	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	REVENUES	-\$9,489,144.81
2022	2022 / 07	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	EXPENDITURES	\$9,489,144.81
2022	2022 / 07	51004 - STATE COURT	NO-GRANT	NO GRANT	REVENUES	-\$845,007.87

Fiscal Year	Fiscal Period	Account Type	Transaction Amount
2022	2022 / 07	ASSETS	-\$201,092,591.26
		LIABILITIES	-\$144,185,098.76
		EQUITY	\$0.00
		REVENUES	-\$663,119,160.54
		EXPENDITURES	\$1,008,396,850.56
Grand Total			\$0.00

The pie chart below the Expenses by Category table shows the distribution of the Grand Total (\$0.00) across the categories: ASSETS (50.00%), LIABILITIES (9.97%), and EQUITY (7.15%).

Lesson 1: INFORMS BI Basics, Continued...

If a Report returns **No Results**, this means there is no data that matches the prompt criteria.

Try expanding the prompt values to include a bigger dataset in order to see results within the Report.



No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again. The filters or selection steps currently being applied are shown below.

Filters

- Fiscal Year is equal to 2022
- and Fiscal Quarter is equal to 2022 Q 3
- and Fiscal Month is equal to 2022 / 07
- and Account Level 28 Code || ' - ' || Account Level 28 Description is equal to 01REIMB - PERSONNEL REIMB ACCOUNTS
- and Balancing Segment Level 30 Code || ' - ' || Balancing Segment Level 30 Name is equal to 51 - STATE REV SHARING/ ENTITY PAYR
- and Ledger Short Name is equal to ACTUALS

Analyze - Refresh

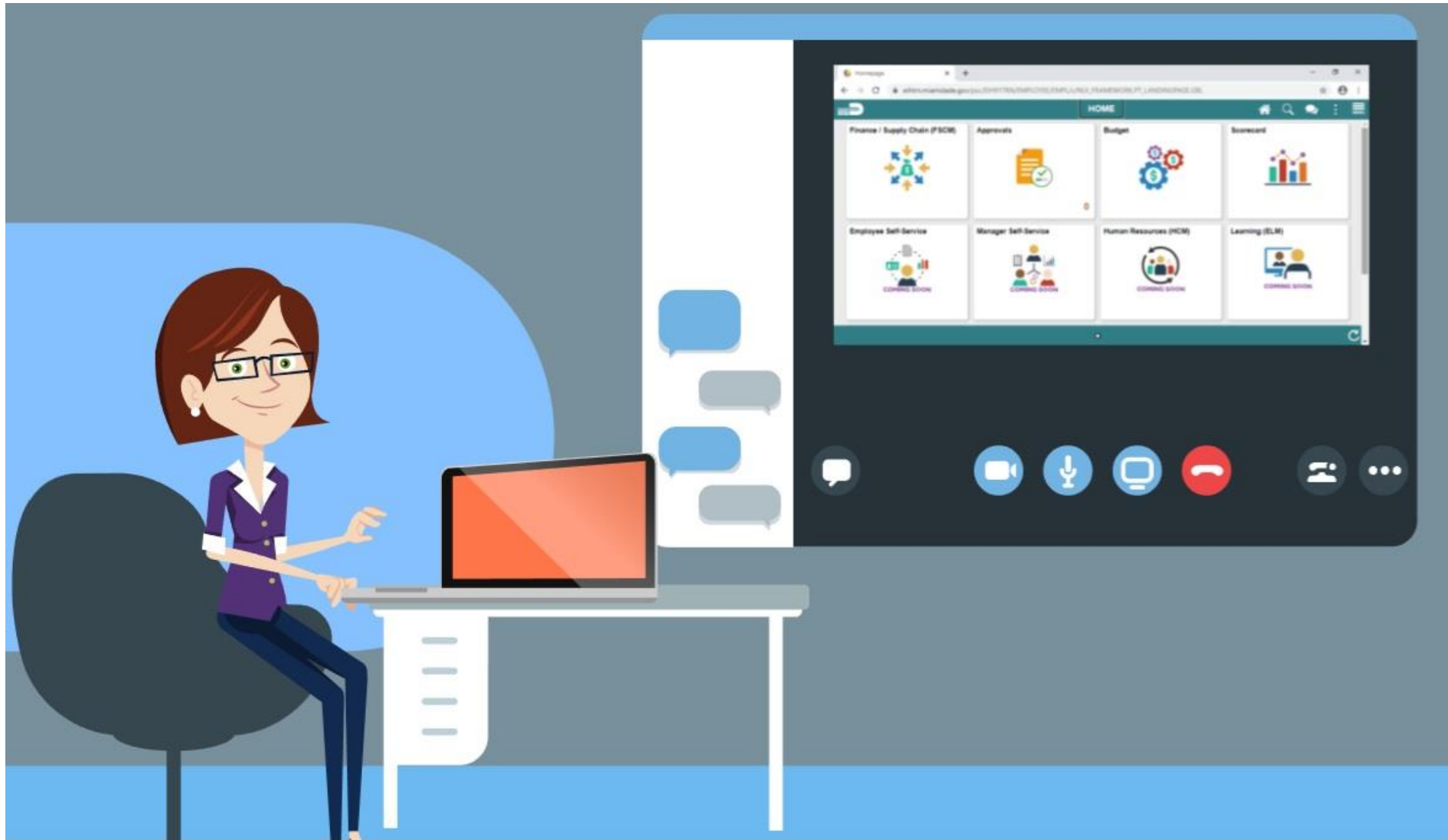
Lesson 1: INFORMS BI Basics, Continued...

Abnormal report values may not signify the information is incorrect. They are a result of the relationships within the data.

- **Blank spaces:** This signifies that no monetary transactions exist.

		2022			
Account Object	Account	Opening Amount	Debit Amount	Credit Amount	Closing Amount
A02 - POOLED CASH & INVESTMENTS	1101000000 - EQUITY IN POOLED CASH	-\$10,019.20	\$6,666,822.85	\$6,666,822.85	-\$10,019.20
E470 - OFFICE SUPPLIES & MINOR EQUIP	5470100000 - OFF. SUPPLIES/OUTSIDE VENDORS	\$10,019.20	\$0.00		\$10,019.20
E611 - TRUST FUND REIMB	5611110000 - DISTRIB OF FUNDS IN TRUST	\$54,005,385.36	\$6,666,822.85		\$60,672,208.21
R312 - SALES, USE & FUEL TAXES	4123000001 - LCL OPT TX-9TH VOTED FUEL TX	-\$5,801,015.42		\$857,876.66	-\$6,658,892.08
R312 - SALES, USE & FUEL TAXES	4124100001 - FIRST LCL OPT GAS TX(1-6CENT)	-\$22,809,018.09		\$3,534,270.79	-\$26,343,288.88
R312 - SALES, USE & FUEL TAXES	4124200002 - SECOND LCL OPT GAS TX(1-5CENT)	-\$10,412,712.07		\$1,561,828.43	-\$11,974,540.50
R335 - STATE SHARED REVENUES	4354900001 - OTHER TRANSPRTN ST SHARE REV	-\$14,982,639.78		\$712,846.97	-\$15,695,486.75
A02 - POOLED CASH & INVESTMENTS	1101000000 - EQUITY IN POOLED CASH	-\$0.01	\$9,489,144.81	\$9,489,144.81	-\$0.01
Q90 - UNRESERVED FUND BALANCE	3301000000 - FUND BALANCE	\$0.01	\$0.00		\$0.01

Lesson 1: Demonstrations and Activities



Lesson 1: Lesson Summary

Having completed the Create Job Opening lesson, you now know:

- The INFORMS BI Solution is a tool used to provide transparent and easy access to INFORMS information across a wide range of audiences through self-service reporting and analysis.
- The Global Header allows easy access to important links.
- INFORMS BI is made up of Dashboards and Reports. Each Dashboard will have at least one Report.

Lesson 2: Dashboards and Reports

At the conclusion of this lesson, you will be able to:

- Understand prompts and use prompt capabilities to filter report data
- Understand hierarchy drilldowns and guided navigation between dashboard pages
- Understand available report features
- Understand the different report and graph types
- Manipulate report columns on a dashboard
- Use different print and export options

Lesson 2: Key Terms

Term	Definition
Column Selector	A set of drop-down lists that contain pre-selected columns. Dynamically select columns and change the data that is displayed in the views of the analysis.
Graph	A type of visualization that displays numeric information visually, making it easier to understand large quantities of data. There are different kinds of graphs, such as: Bar (Vertical, Horizontal, Stacked), Line, Area, Pie , Line-Bar, Time Series Line, Scatter, Bubble, Radar.
Guided Navigation	A feature that allows navigating to another report with prompt values automatically enabled that correspond to the original report navigation hyperlink.
Hierarchal column	A column that can expand (or drill down) into more specific information for a certain number of pre-established levels.
Pie Chart	A type of visualization that shows data sets as dollar amounts or percentages of a whole. Pie charts are useful for comparing parts of a whole, such as expenditures by fund, program, or account.
Pivot Table	A visual representation of data similar to a standard table. It can display multiple levels of both row and column headings, allowing you to view data in many different ways.

Lesson 2: Key Terms, Continued...

Term	Definition
Prompt	A tool that allows you to filter the dashboard to smaller increments of data. Once a prompt is applied, the report for that dashboard will reflect the newly queried selections.
Subject Area	A logical grouping of similar content and information.
Table	A visual representation of data organized by rows and columns.
View Selector	A drop-down list used to select a specific view of the results from among the saved views.
Visualization	A graph or chart on a report. They include graphs, pie charts, gauges, funnels, performance tiles, and map views.
Column Selector	A set of drop-down lists that contain pre-selected columns. Dynamically select columns and change the data that is displayed in the views of the analysis.
Graph	A type of visualization that displays numeric information visually, making it easier to understand large quantities of data. There are different kinds of graphs, such as: Bar (Vertical, Horizontal, Stacked), Line, Area, Pie , Line-Bar, Time Series Line, Scatter, Bubble, Radar.

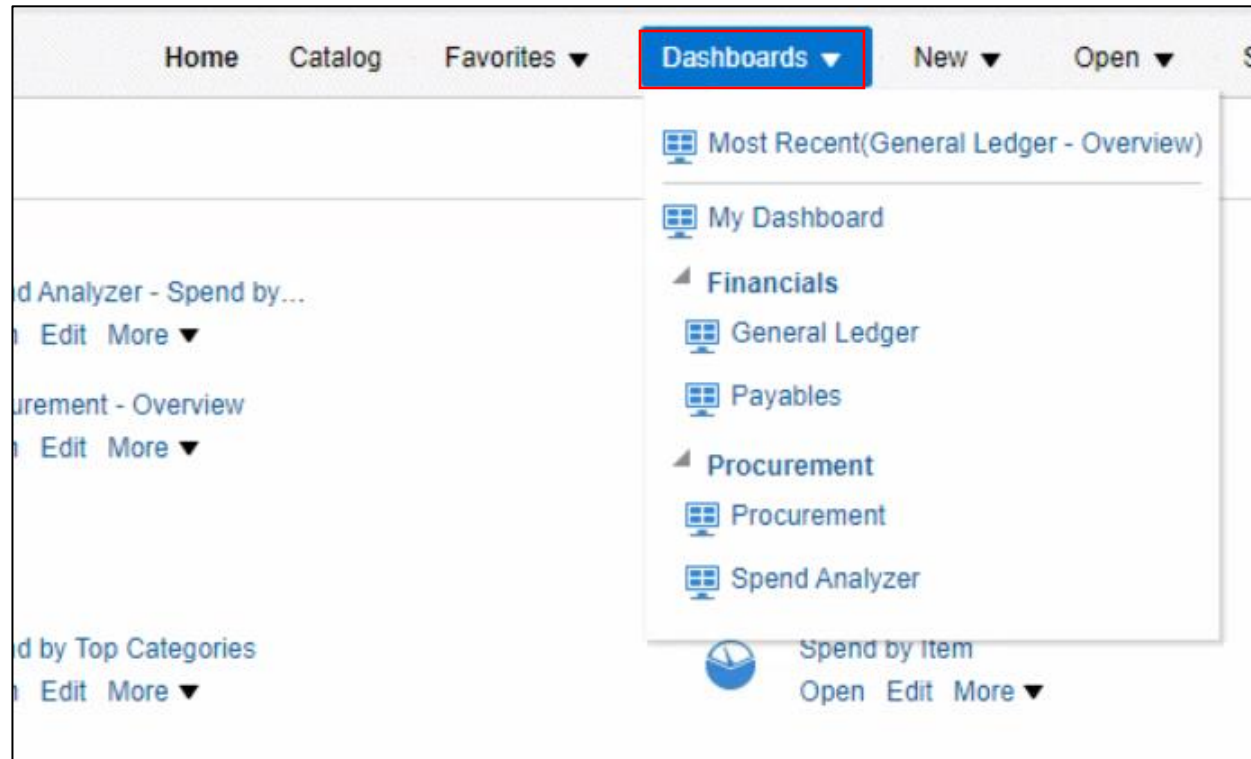
Lesson 2: Dashboards and Reports

- The **Dashboards** button allows movement from one subject area to another to view different Reports.
- Dashboards are organized by subject areas; a logical grouping of similar content and information.

Lesson 2: Dashboards and Reports, Cont'd...

A list of all the available subject area Dashboards can be found under the **Dashboards** link on the Global Header.

Navigate to **INFORMS > Analytics (OBIA) > Dashboards**



Lesson 2: Dashboards and Reports, Cont'd...

- Once a subject area is selected from the drop-down list, the Report(s) on the first Dashboard of that subject area will run based upon predefined prompt values.
- Navigate between the Dashboard pages within the subject area by selecting on the individual tabs. Each Dashboard page (tab) will then display the corresponding Reports.

Lesson 2: Dashboards and Reports, Cont'd...

Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Procurement > Spend Analyzer**

ORACLE Business Intelligence Spend Analyzer

Calendar Year: 2022, Calendar Quarter: --Select Value--, Calendar Month: --Select Value--, Supplier: --Select Value--
PO Business Unit: AD, Department ID: --Select Value--, Top Level Category: --Select Value--

Apply Reset

View trend reports for Total Spend, Total Payables Leakage, Total Off-Contract, Total Contract Leakage KPIs by clicking on respective dial gauges below.

Total Spend: \$ 7.94M
Legend: 1M - 20M (Green), 20M - 40M (Yellow), > 40M (Red)

Payables Leakage Rate: 24.70%
Legend: 0 - 10% (Green), 10% - 15% (Yellow), > 15% (Red)

Off Contract Spend %: 16.00%
Legend: 0 - 10% (Green), 10% - 15% (Yellow), > 15% (Red)

Contract Leakage %: 0
Legend: 0 - 10% (Green), 10% - 15% (Yellow), > 15% (Red)

Analyze - Edit - Refresh - Print - Export

Spend by Top Categories

Time run: 8/5/2022 11:37:41 AM

Rank	Top Category Name	Spend	% Spend
1	All Cat	\$7937056.97	\$1.00
2	Not Applicable	\$2280.00	\$0.00
Grand Total		\$7939336.97	\$1.00

0.0%
100.0%
Spend

Spend by Top Suppliers

Time run: 8/5/2022 11:37:41 AM

Rank	Top Supplier Name	Spend	% Spend
1	MWI VETERINARY SUPPLY CO	\$437,189.30	15.8%
2	PATTERSON VETERINARY SUPPLY INC	\$360,930.69	13.0%
3	LAVCOR LLC	\$349,339.61	12.6%
4	JESUS MARTINEZ	\$331,999.37	12.0%
5	MIAMI VETERINARY FOUNDATION INC	\$169,270.00	6.1%
6	FLORIDA VETERINARY MEDICINE FACULTY	\$106,428.34	3.8%
7	INTERVET INC	\$70,694.46	2.6%
8	JRD & ASSOCIATES INC	\$63,390.00	2.3%
9	PETHEALTH SERVICES USA INC	\$57,812.00	2.1%

28.0%
15.8%
13.0%
12.6%
12.0%
6.1%
3.8%
2.6%
2.3%
2.1%

Spend

Analyze - Refresh - Export

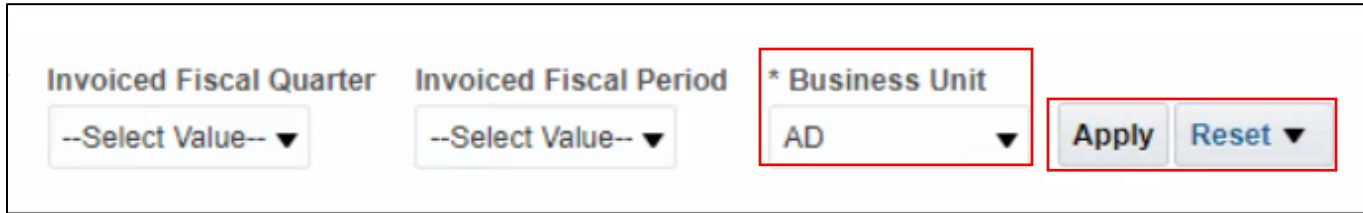
Lesson 2: Dashboards and Reports, Cont'd...

- Dashboards automatically open on the Overview Tab.
- Tabs navigate to the other subject areas within the Dashboard.
- Most Reports can be accessed through a Dashboard page, which is the primary navigation method in INFORMS BI.



Lesson 2: Dashboards and Reports, Cont'd...

An asterisk (*) indicates that the prompt is a required field. After selecting prompt values, click the **Apply** button to run the report.



A screenshot of a report filter interface. It contains three dropdown menus: 'Invoiced Fiscal Quarter' with '--Select Value--', 'Invoiced Fiscal Period' with '--Select Value--', and '* Business Unit' with 'AD'. To the right are two buttons: 'Apply' and 'Reset' with a downward arrow. Red boxes highlight the '* Business Unit' dropdown and the 'Apply' and 'Reset' buttons.

The **Reset** button provides three options:

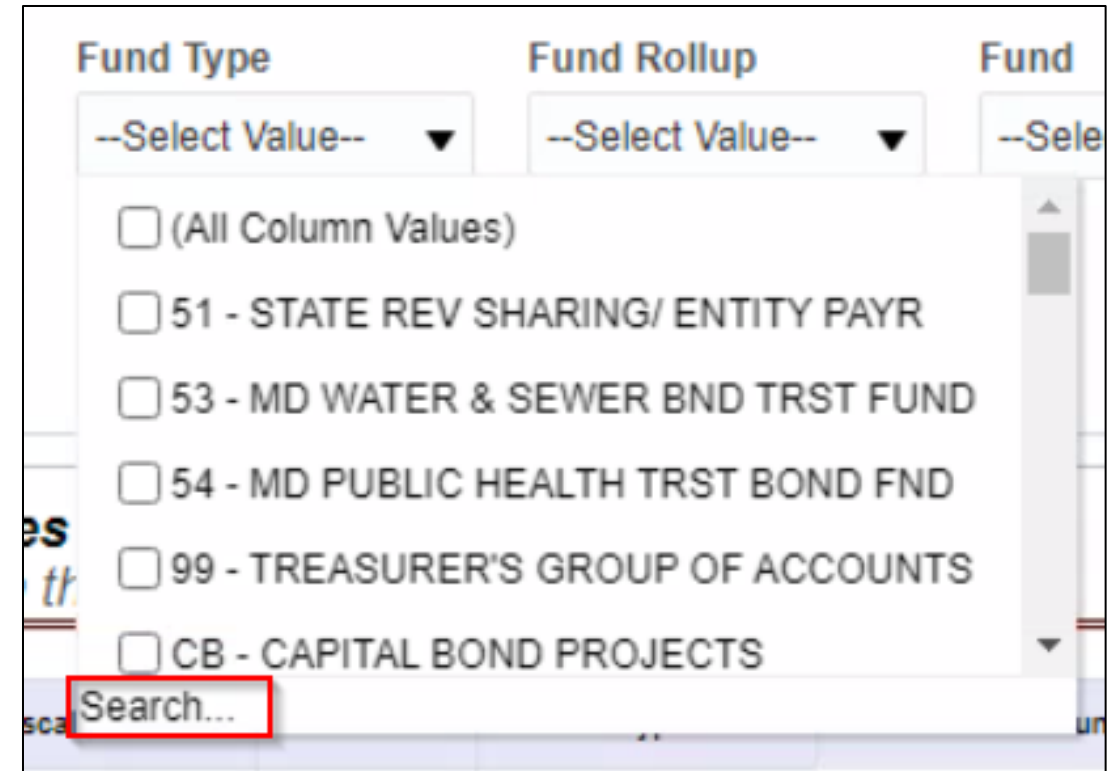
- **Reset to last applied values**
- **Reset to default values**
- **Clear All**



A screenshot of the 'Reset' dropdown menu. The menu is open, showing three options: 'Reset to last applied values', 'Reset to default values', and 'Clear All'. A red box highlights the entire dropdown menu. The 'Apply' button is visible to the left of the dropdown.

Lesson 2: Dashboards and Reports, Cont'd...

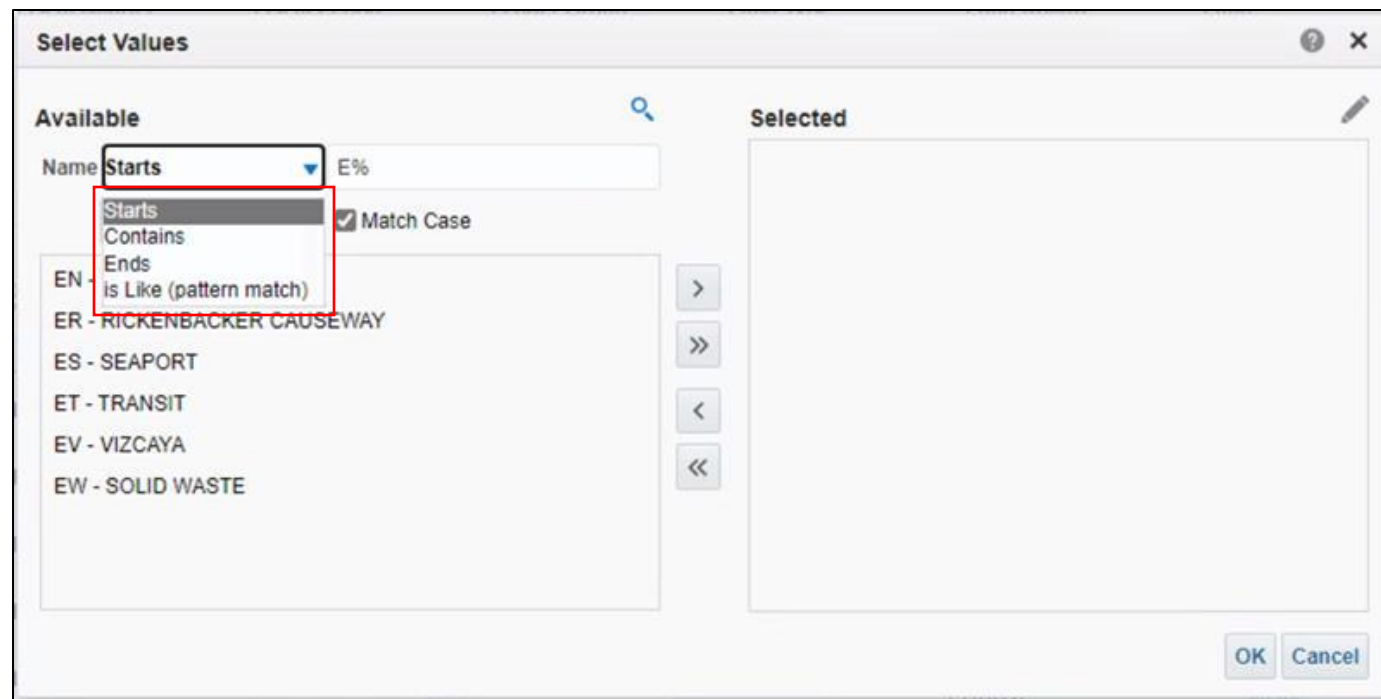
- INFORMS BI has an automatic search feature that reduces the number of prompt values as a value is typed.
- Use the **More/Search** feature if the exact value is not known or to choose more than one value.



The screenshot shows a web interface with three dropdown menus: 'Fund Type', 'Fund Rollup', and 'Fund'. The 'Fund Type' dropdown is open, displaying a list of options with checkboxes: '(All Column Values)', '51 - STATE REV SHARING/ ENTITY PAYR', '53 - MD WATER & SEWER BND TRST FUND', '54 - MD PUBLIC HEALTH TRST BOND FND', '99 - TREASURER'S GROUP OF ACCOUNTS', and 'CB - CAPITAL BOND PROJECTS'. A search bar at the bottom of the dropdown is highlighted with a red box and contains the text 'Search...'. The search bar is located at the bottom left of the dropdown menu.

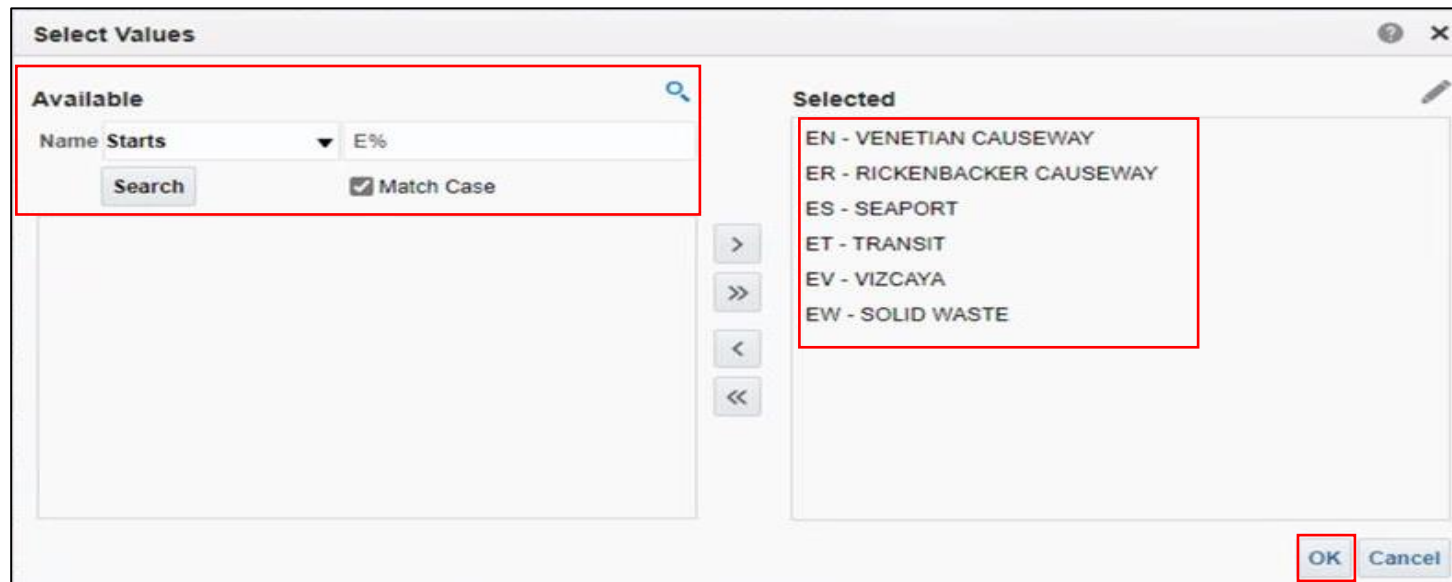
Lesson 2: Dashboards and Reports, Cont'd...

- Once the **Search** button has been selected, the **Select Values** window shown below displays.
- Select the type of search: **Starts, Contains, Ends, is Like (pattern match)**.



Lesson 2: Dashboards and Reports, Cont'd...

- After a search type is chosen, enter the search criteria.
- Move the selected items to the **Selected** box via the **Move** or **Move All** arrows.
- Select **OK** to finish, the selected items appears in the prompt field.



The screenshot shows a 'Select Values' dialog box with the following components:

- Available:** A search field with 'Name Starts' selected and 'E%' entered. A 'Search' button and a 'Match Case' checkbox are also present.
- Selected:** A list of items: EN - VENETIAN CAUSEWAY, ER - RICKENBACKER CAUSEWAY, ES - SEAPORT, ET - TRANSIT, EV - VIZCAYA, and EW - SOLID WASTE.
- Navigation:** Four arrows (>, >>, <, <<) are located between the Available and Selected boxes.
- Buttons:** 'OK' and 'Cancel' buttons are at the bottom right.

Lesson 2: Dashboards and Reports, Cont'd...

Reports are run with default criteria. Prompt criteria can be changed.

For example, most Dashboard pages are defaulted to show Reports from a statewide perspective. Use prompts to narrow the reporting results to a specific Department.

Below is a Financials Example:

Fiscal Year	Fiscal Quarter	Fiscal Period	Ledger Group	Fund Type	Fund Rollup	Fund
2022 ▼	2022 Q 3 ▼	2022 / 07 ▼	ACTUALS ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼
Department Number	Grant	Account Type	Account Character	Account Object		
--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	Apply Reset ▼	

Lesson 2: Dashboards and Reports, Cont'd...

Prompts

- Available at the top of each Dashboard page.
- Allow to filter the Dashboard to smaller increments of data.
- Once applied, the Report for that Dashboard will reflect the newly queried selections.
- Many Dashboard pages default prompt values. However, these defaults can be changed.

Fiscal Year	Fiscal Quarter	Fiscal Period	Ledger Group	Fund Type	Fund Rollup	Fund
2022 ▼	2022 Q 3 ▼	2022 / 07 ▼	ACTUALS ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼
Department Number	Grant	Account Type	Account Character	Account Object		
--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	Apply Reset ▼	

Lesson 2: Dashboards and Reports, Cont'd...

- **Constrained Prompts** limit all other prompt values. For example, if a **Fund Type** is used as a constrained prompt, the **Fund Rollup** prompt only shows Fund Rollup for that fund type. A prompt selection may not display because a previously constrained prompt value eliminated it as a choice.

Fiscal Year	Fiscal Quarter	Fiscal Period	Ledger Group	Fund Type	Fund Rollup	Fund	
2022 ▼	2022 Q 3 ▼	2022 / 07 ▼	ACTUALS ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	
Department Number	Grant	Account Type	Account Character	Account Object			
--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼			
						Apply	Reset ▼

Lesson 2: Dashboards and Reports, Cont'd...

- INFORMS BI Reports can be displayed as tables, visualizations, or a combination of the two.
- Visualizations available in INFORMS BI include:
 - **Table**
 - **Pivot Table**
 - **Graph**
 - **Gauge**
 - **Pie Chart**

Lesson 2: Dashboards and Reports, Cont'd...

- **Table** displays results in a visual representation of data organized by rows and columns.

GL Overview - Expenses by Category
Click on the values to drill to further detail

Fiscal Year	Fiscal Period	Balancing Segment Code	Balancing Segment Description	Account Type	Account Level 29 Code	Account Level 29 Description	Transaction Amount
2022	2022 / 08	SP001	PEOPLE'S TRANSPORTATION	ASSETS	A10	ASSET ACCOUNTS	\$31,752,514.58
		SD001	COUNTY HEALTH CARE SALES SURTX	ASSETS	A10	ASSET ACCOUNTS	\$20,109,971.33
		CBK12	GOB SR21A DRAWN PROCEEDS/FEE	ASSETS	A10	ASSET ACCOUNTS	\$19,946,476.71
		ET007	RESTRICTED - NON-CAPITAL PROJE	ASSETS	A10	ASSET ACCOUNTS	\$16,280,777.26
		SR011	COVID-19-NOT OBLIGATED	ASSETS	A10	ASSET ACCOUNTS	\$12,677,755.95
		ES001	SEAPORT GENERAL OPERATING FUND	ASSETS	A10	ASSET ACCOUNTS	\$10,365,333.89
		TA024	DEFERRED COMPENSATION	ASSETS	A10	ASSET ACCOUNTS	\$7,946,148.07
		IS014	MDC HEALTH INSURANCE	ASSETS	A10	ASSET ACCOUNTS	\$6,835,108.77
		CI007	CI-RIF DISTRICT 7	ASSETS	A10	ASSET ACCOUNTS	\$5,362,178.83
		53010	DEBT SERVICE 2008A&B BONDS	ASSETS	A10	ASSET ACCOUNTS	\$4,862,965.54
		TA010	TAX COLL - TAX ESCROW ACCOUNT	ASSETS	A10	ASSET ACCOUNTS	\$4,760,976.61
		D3023	SOB JUNIOR LIEN SERIES 2016	ASSETS	A10	ASSET ACCOUNTS	\$4,399,807.48
		EW007	DISPOSAL OPERATIONS	ASSETS	A10	ASSET ACCOUNTS	\$4,250,000.56
		ST007	2/3 CONVENTION DEVELOP. TX CDT	ASSETS	A10	ASSET ACCOUNTS	\$4,187,615.35
		SU001	STORMWATER UTILITY FUND	ASSETS	A10	ASSET ACCOUNTS	\$3,547,377.15
		TA011	TAX COLL - AUTO TAG ACCOUNT	ASSETS	A10	ASSET ACCOUNTS	\$3,491,695.70
		G3074	TRANSPORTATION PW	ASSETS	A10	ASSET ACCOUNTS	\$3,185,027.16
		S2001	OTHER OPERATING AGENCIES-GRANT	ASSETS	A10	ASSET ACCOUNTS	\$3,150,810.00
		G3019	PD OFF-DUTY PERMANENT PTS	ASSETS	A10	ASSET ACCOUNTS	\$2,835,152.32
		G5009	FIMD ADMINISTRATION	ASSETS	A10	ASSET ACCOUNTS	\$2,659,951.30
		SR004	HURRICANE IRMA	ASSETS	A10	ASSET ACCOUNTS	\$2,263,404.68
		D5018	MASTER LEASE 2020 \$26.971M T3A	ASSETS	A10	ASSET ACCOUNTS	\$2,249,358.36
		D5017	MASTER LEASE 2020 \$47.663M	ASSETS	A10	ASSET ACCOUNTS	\$2,070,799.21
		53025	W&S DEBT SERVICE 2021 BONDS	ASSETS	A10	ASSET ACCOUNTS	\$1,970,177.74
		D5015	MASTER LEASE 2019 \$27.218M	ASSETS	A10	ASSET ACCOUNTS	\$1,957,510.62

Rows 1 - 25

Lesson 2: Dashboards and Reports, Cont'd...

- **Pivot table** displays data similarly to a standard table but can display multiple levels of both row and column headings.

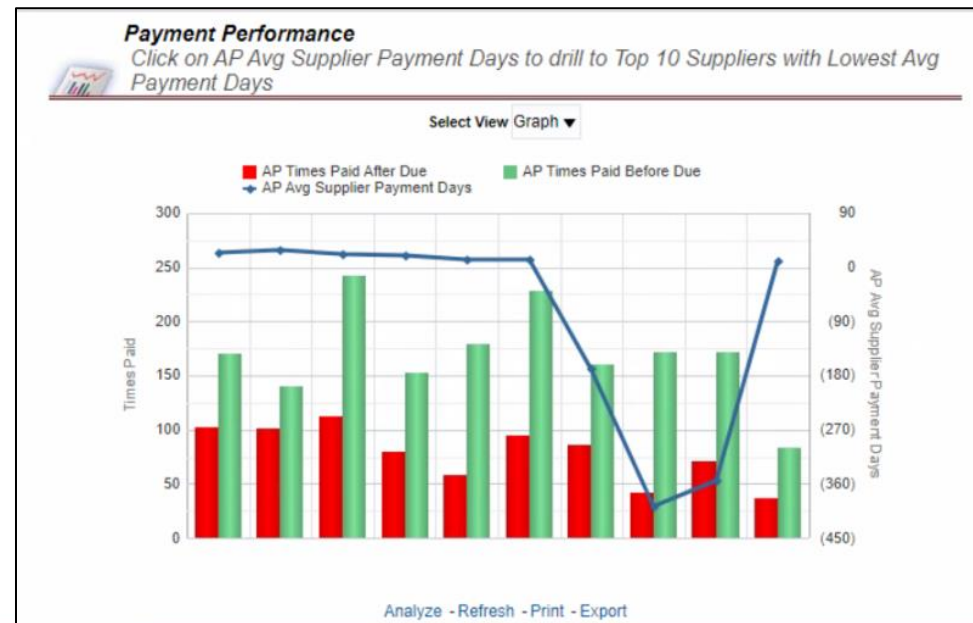
 **Monthly GL Account Balance**

The Equity Balance is only updated

Natural Account	2022 Q 1			2022 Q 2
	2022 / 01	2022 / 02	2022 / 03	2022 / 04
▶ ASSETS	\$5,430,370,534.27	\$9,441,730,906.45	\$6,791,643,285.36	\$6,719,481,087.63
▶ LIABILITIES	-\$6,443,530,045.66	-\$7,031,147,243.01	-\$6,358,116,614.99	-\$6,514,130,771.51
▶ EQUITY	\$889,124,982.01	\$889,124,982.01	\$889,124,982.01	\$889,124,982.01
▶ REVENUES	-\$286,755,221.96	-\$5,431,247,365.07	-\$8,995,642,794.87	-\$9,951,231,813.50
▶ EXPENDITURES	\$410,789,751.34	\$2,131,538,719.62	\$7,672,991,142.49	\$8,856,756,515.37

Lesson 2: Dashboards and Reports, Cont'd

- **Graph** displays numeric information visually, which makes it easier to understand large quantities of data.
 - Graphs are used most often and usually reveal trends or show quantities associated with categories (e.g., Budget Amount by Year, Actual Expenses by Department).

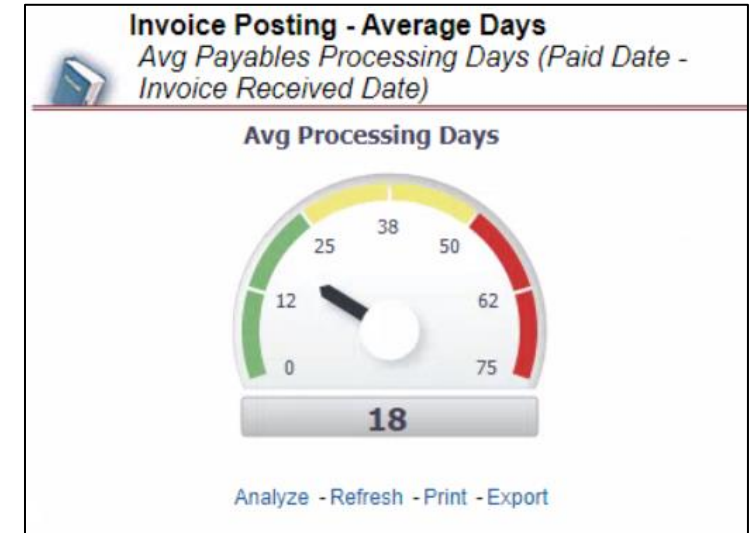


Lesson 2: Dashboards and Reports, Cont'd

- **Gauge** is a plot's one data point, indicating whether that point falls in an acceptable or unacceptable range.

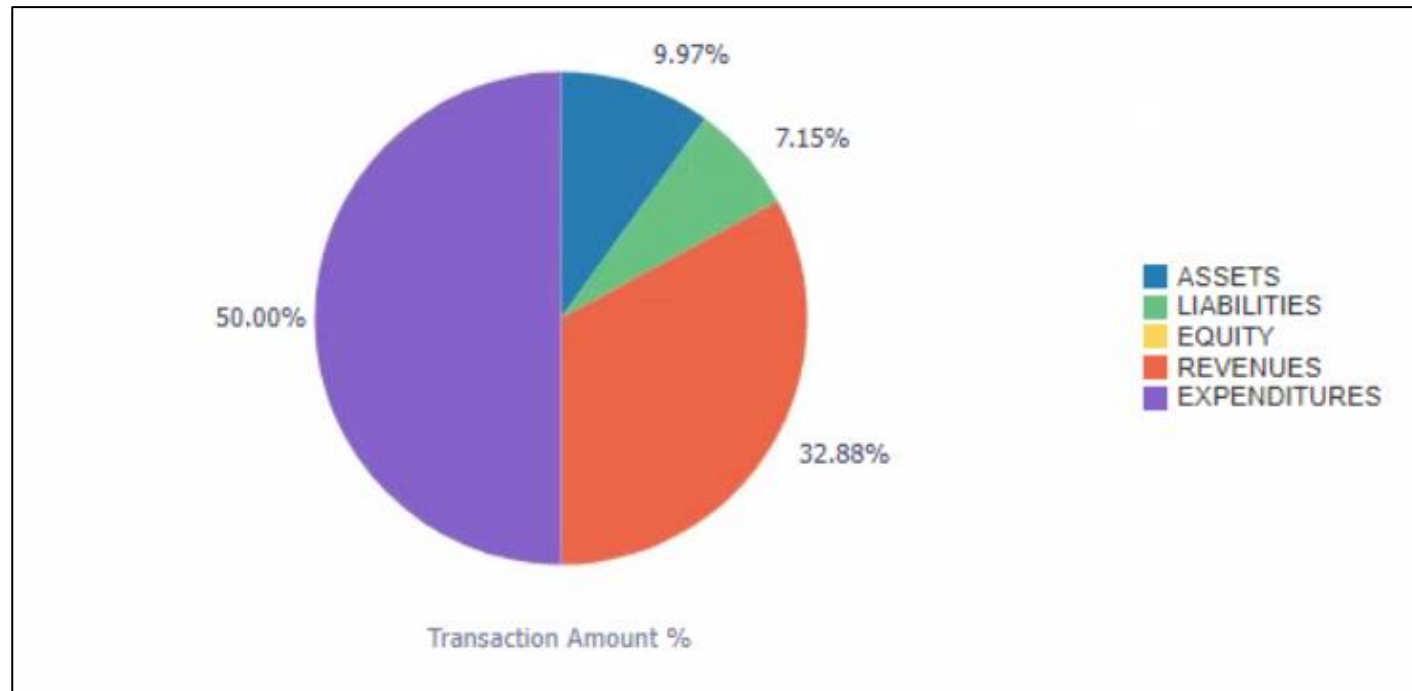
- There are different kinds of gauges (e.g., Dial, Horizontal bar, Vertical bar, Bulb)

- Gauges identify problems in data, making them very useful for showing performance against goals (e.g., Budget Expense Remaining for a Department).



Lesson 2: Dashboards and Reports, Cont'd

- **Pie Chart** shows data sets as dollar amounts or percentages of a whole. Pie charts are useful for comparing parts of a whole, such as expenditures by fund, program, or account.



Lesson 2: Dashboards and Reports, Cont'd...

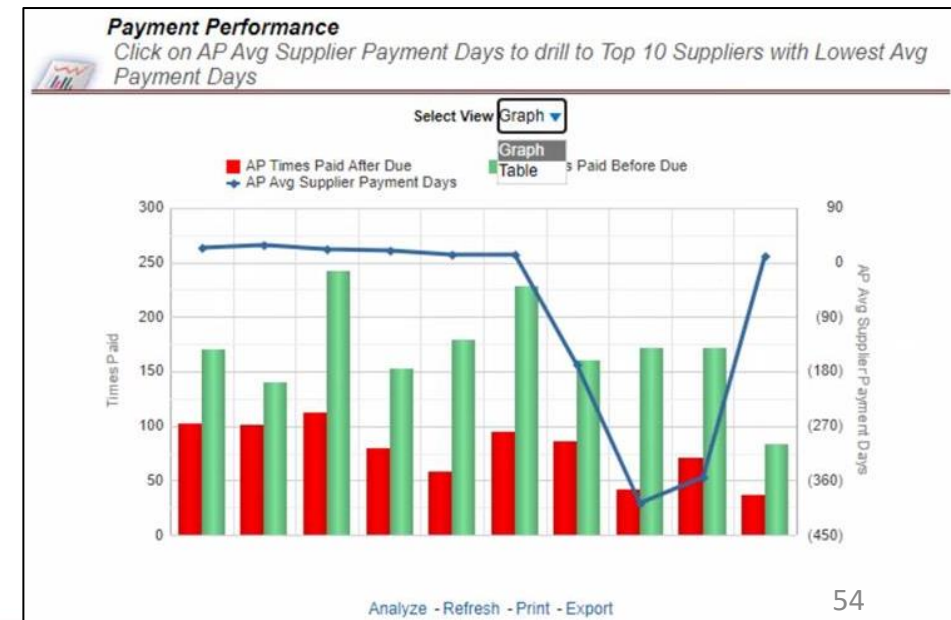
INFORMS BI has different types of views when analyzing a report.

In this report visualizations, we will see the different views available employees can select from to narrow down their results.

Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Financials >**

Payables > Payment Performance

- **View Selector** is a drop-down list to select a specific view of the results.



Lesson 2: Dashboards and Reports, Cont'd...

Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Procurement**

> Spend Analyzer > Overview

- **Column selector:** a set of drop-down lists that contain pre-selected columns. Select columns and change the data that is displayed in the views of the analysis as needed.

Lesson 2: Dashboards and Reports, Cont'd...

- The **Display** list provides the option to select and view:
 - **Summary by Quarter**
 - **Details by Category**



Lesson 2: Dashboards and Reports, Cont'd...

- INFORMS BI allows drilling down on a column for more detailed information. The most common drilldown is a **hierarchical column** (or **hierarchy**).
- A **hierarchy** is a column that drills down into more specific information for a certain number of pre-established levels.

Lesson 2: Dashboards and Reports, Cont'd...

Navigate to **Analytics (OBIA) > Dashboards > Financials > General**

Ledger > Overview > Fund and Grant Balances by Account Type

- The number of drilldown levels varies for each Report and each blue text indicates that a drill down is available.

Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Period	Fund Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46
2022	2022 / 08	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	REVENUES	-\$9,489,144.79
2022	2022 / 08	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	EXPENDITURES	\$9,489,144.79
2022	2022 / 08	51003 - SALES TAX REVENUE	NO-GRANT	NO GRANT	REVENUES	-\$40,308,228.34
2022	2022 / 08	51003 - SALES TAX REVENUE	NO-GRANT	NO GRANT	EXPENDITURES	\$40,308,228.34
2022	2022 / 08	51004 - STATE COURT FAC	NO-GRANT	NO GRANT	REVENUES	-\$635,237.52
2022	2022 / 08	51004 - STATE COURT FAC	NO-GRANT	NO GRANT	EXPENDITURES	\$635,237.52
2022	2022 / 08	51006 - ENTITY PAYROLL	NO-GRANT	NO GRANT	ASSETS	-\$11,337.97

Rows 1 - 10
Analyze - Refresh - Print - Export

Lesson 2: Dashboards and Reports, Cont'd...

- The images below will show an example of using this drill down option.

Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Period	Fund Code	Balancing Segment Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46

Return - Analyze - Refresh - Print - Export - Create Bookmark Link

Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Quarter	Fiscal Period	Fund Code	Balancing Segment Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46

Return - Back - Analyze - Refresh - Print - Export - Create Bookmark Link

Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Period	Fiscal Quarter	Fiscal Date	Fiscal Period	Fund Code	Balancing Segment Code	Grant Code	Grant Description	Account Type	Amount
2022	May	2022 Q 3	5/31/2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	May	2022 Q 3	5/31/2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	May	2022 Q 3	5/31/2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46

Return - Back - Analyze - Refresh - Print - Export - Create Bookmark Link

Lesson 2: Dashboards and Reports, Cont'd...

- **Guided Navigation** allows movement from one Report to another.
- A hyperlink signifies that it is possible to use this data to navigate to another Dashboard or Report.

General Ledger

Overview **Balance Sheet** Budget vs. Actual GL Balance Trial Balance

Fiscal Year: 2022 Ledge: ACT

Monthly GL Account Balance The Equity Balance

Natural Account	2022 Q 1	2022 / 02	2022 / 03
▶ ASSETS	5,430,370.53	791,643.28	358,116.61
▶ LIABILITIES	-6,443,530.045	Account Object	889,124.98
▶ EQUITY	889,124.982	Account	395,642.79
▶ REVENUES	-286,755.221		410,789,751.34
▶ EXPENDITURES		2,131,538,719.62	7,672,991.14

Monthly GL Account Balance - Type to Character

Fiscal Quarter	Fiscal Month	Account Level 30 Code	Account Level 29 Code	Balance Amount
2022 Q 1	2022 / 01	ASSETS	A10	5,430,370,534.27
Grand Total				5,430,370,534.27

[Return](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

Lesson 2: Dashboards and Reports, Cont'd...

- Selecting the report name opens another Report that has additional information.
- For example, Selecting **Account Character** from the \$5,403,370,534 cell displays the **Type of Character** Report with Fiscal Quarter, Fiscal Month, Account Level 30 Code, Account Level 29 Code, and Balance Amount passing through from the **Monthly GL Account Balance Report**.

 **Monthly GL Account Balance**

The Equity Balance

Natural Account	2022 Q 1		
	2022 / 01	2022 / 02	2022 / 03
▶ ASSETS	5,430,370,534	 Account Character	791,643,28
▶ LIABILITIES	-6,443,530,045	 Account Object	358,116,61
▶ EQUITY	889,124,982	 Account	389,124,98
▶ REVENUES	-286,755,221		395,642,79
▶ EXPENDITURES	410,789,751.34	2,131,538,719.62	7,672,991,14


Monthly GL Account Balance - Type to Character

Fiscal Quarter	Fiscal Month	Account Level 30 Code	Account Level 29 Code	Balance Amount
2022 Q 1	2022 / 01	ASSETS	A10	5,430,370,534.27
Grand Total				5,430,370,534.27

[Return](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

Lesson 2: Dashboards and Reports, Cont'd...

- Employees can use the arrow in the **Natural Account** column to view the additional details without selecting the numbers in hyperlinks.

 **Monthly GL Account Balance**

The Equity Balance is

Natural Account	2022 Q 1		
	2022 / 01	2022 / 02	2022 / 03
▲ ASSETS	\$5,430,370,534.27	\$9,441,730,906.45	\$6,791,6
▲ A10 - ASSET ACCOUNTS	\$5,430,370,534.27	\$9,441,730,906.45	\$6,791,6
▶ A02 - POOLED CASH & INVESTMENTS	\$3,370.40	\$3,370.40	
▶ A04 - NON-POOLED CASH & INVESTMENTS	\$4,010,162,416.65	\$8,173,209,158.22	\$5,401,5
▶ A05 - INVESTMENTS	\$96,478,414.97	\$108,948,628.60	\$105,2

Lesson 2: Dashboards and Reports, Cont'd...

- The columns in tables and pivot tables can be rearranged.
- Modify a table by right-clicking on a column header
- The following options display, depending on the column properties:
 - Sort Column
 - Exclude Column
 - Include Column
 - Move Column

Lesson 2: Dashboards and Reports, Cont'd...

- **Sort Column:** Provides options for sorting the selected column.
- **Exclude column:** Excludes the column from the table completely. The data will no longer be broken out by this column header.

Invoice Transactions Efficiency
Click on AP Avg Invoice Amount to drill to Top 10 Suppliers by lowest AP Avg Invoice Amount

Select View Table ▼

Fiscal Period	AP Invoice Amount	AP Invoice Count
October	↑↓ Sort Column ▶	522
November	Exclude column	455
December	Include column ▶	Business Unit
January	Move Column ▶	...
February		477
March	\$619,590.25	645
April	\$430,464.22	451
May	\$399,842.38	522
June	\$353,222.85	557
July	\$430,017.71	413

Rows 1 - 10
Analyze - Refresh - Print - Export

Lesson 2: Dashboards and Reports, Cont'd

- **Include column:** Lists the columns available to add into the table.
- **Move Column:** Allows to manipulate the data and move a particular column to see the data in a different way.
 - A column may be moved in the following ways: Left, Right, To Prompts, and To Sections. Employees can drag the columns to the desire location.

Invoice Transactions Efficiency
Click on AP Avg Invoice Amount to drill to Top 10 Suppliers by lowest AP Avg Invoice Amount

Select View Table ▼

Fiscal Period	AP Invoice Amount	AP Invoice Count
October		522
November		455
December		...
January		Business Unit
February		477
March	\$619,590.25	645
April	\$430,464.22	451
May	\$399,842.38	522
June	\$353,222.85	557
July	\$430,017.71	413

Rows 1 - 10
Analyze - Refresh - Print - Export

Lesson 2: Dashboards and Reports, Cont'd...

There are multiple ways to reset tables after the columns have been rearranged.

1. Selecting **Refresh** under the table will reset the columns
2. Selecting **Clear My Customization** menu item, which we will discuss further in the next lesson.

ORACLE Business Intelligence

Payables

Overview AP Balance Payments Due Effectiveness Payment Performance Holds and Discounts

Invoiced Fiscal Year: 2022 Invoiced Fiscal Quarter: --Select Value-- Invoice: --Sele

Invoice Transactions Efficiency
Click on AP Avg Invoice Amount to drill to Top 10 Suppliers by lowest AP Avg Invoice Amount

Select View Table

Business Unit	Fiscal Period	AP Invoice Amount	AP Invoice Count
AD	October	\$474,400.81	522
	November	\$655,278.03	455
	December	\$740,733.46	720
	January	\$443,515.26	400
	February	\$524,249.89	477
	March	\$619,590.25	645
	April	\$430,464.22	451
	May	\$399,842.38	522
	June	\$353,222.85	557
	July	\$430,017.71	413

Analyze Refresh Print -Export

Dashboards New Open Signed In As T0140725

Edit Dashboard

PO Business Unit Print

AD Export to Excel

Apply Reset Refresh

Create Bookmark Link

Create Prompted Link

Apply Saved Customization

Save Current Customization...

Edit Saved Customizations...

Clear My Customization

January 2022(default)

Supplier Name

VETERINARY SUPPLY CO

TERSON VETERINARY SUPP

OR LLC

SUS MARTINEZ \$286,777.58

MI VETERINARY FOUNDATION INC \$169,270.00

BRIDA VETERINARY MEDICINE FACILITY \$106,428.34

Lesson 2: Dashboards and Reports, Cont'd...

- Breadcrumbs identify the employee's current location in INFORMS BI.
- Breadcrumbs are active links that can be used to navigate back through to the original starting point.

General Ledger

Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Quarter	Fiscal Period	Fund Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	2022 Q 3	2022 / 08	51001 - GAS TAXES	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46
2022	2022 Q 3	2022 / 08	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	REVENUES	-\$9,489,144.79
2022	2022 Q 3	2022 / 08	51002 - STATE REVENUE SHARING	NO-GRANT	NO GRANT	EXPENDITURES	\$9,489,144.79
2022	2022 Q 3	2022 / 08	51003 - SALES TAX REVENUE	NO-GRANT	NO GRANT	REVENUES	-\$40,308,228.34
2022	2022 Q 3	2022 / 08	51003 - SALES TAX REVENUE	NO-GRANT	NO GRANT	EXPENDITURES	\$40,308,228.34
2022	2022 Q 3	2022 / 08	51004 - STATE COURT FAC	NO-GRANT	NO GRANT	REVENUES	-\$635,237.52
2022	2022 Q 3	2022 / 08	51004 - STATE COURT FAC	NO-GRANT	NO GRANT	EXPENDITURES	\$635,237.52
2022	2022 Q 3	2022 / 08	51006 - ENTITY PAYROLL	NO-GRANT	NO GRANT	ASSETS	-\$11,337.97

Return - Analyze - Refresh - Print - Export - Create Bookmark Link

General Ledger: Overview > Fund and Grant Balances by Account Type

Lesson 2: Dashboards and Reports, Cont'd...

- Use the **Return** button on a report page to display the original Report or the previous page of the report.
- Select on the **Return** button at the bottom of the page to view the previous page of the **Fund and Grant Balances by Account Type** report.



Fund and Grant Balances by Account Type
Click on the values to drill to further detail

Fiscal Year	Fiscal Period	Fund Code	Balancing Segment Code	Grant Code	Grant Description	Account Type	Amount
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	ASSETS	\$0.01
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	REVENUES	-\$3,561,236.47
2022	2022 / 08	51001 - GAS TAXES	51001	NO-GRANT	NO GRANT	EXPENDITURES	\$3,561,236.46

[Return](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

Lesson 2: Dashboards and Reports, Cont'd...

In INFORMS BI, the defaulted rows of data depend on the table or pivot table. Employees can page through the table by using the arrow icons

at the bottom of each report:

- **Returns** to the beginning of the table
- **Up** a page
- **Down** a page
- Displays maximum (500) rows per page

Payment Performance
Click on AP Avg Supplier Payment Days to drill to Top 10 Suppliers with Lowest Avg Payment Days

Select View Table ▾

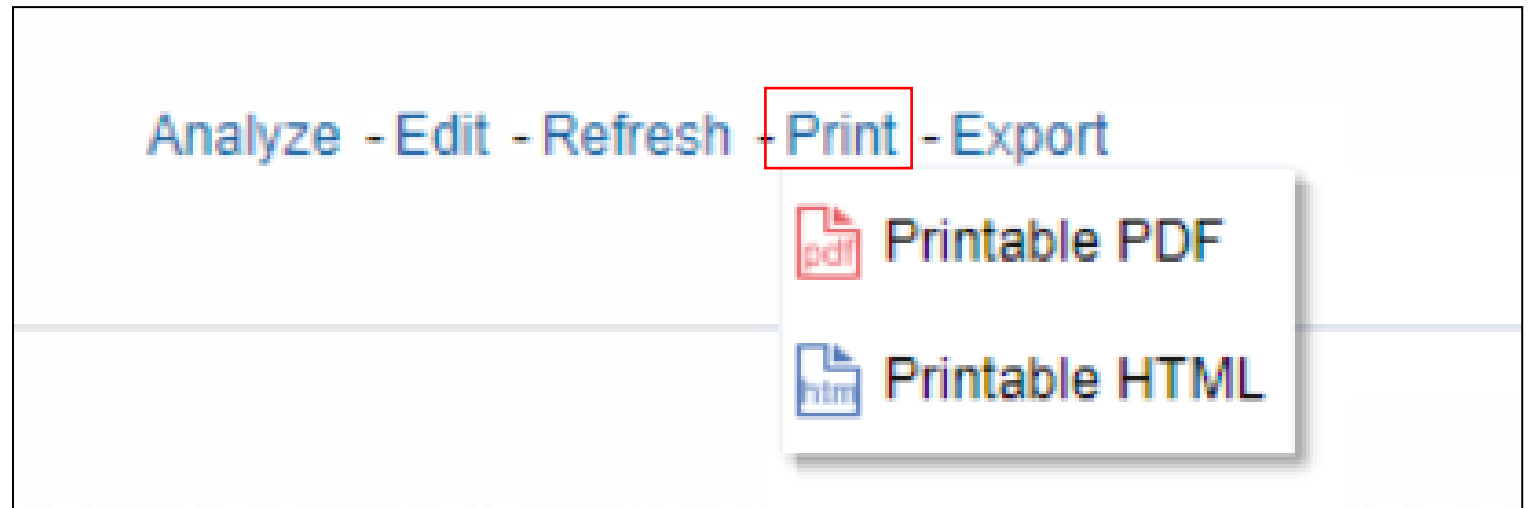
Invoiced Fiscal Year	AP Avg Supplier Payment Days	AP Times Paid After Due	AP Times Paid Before Due	Fiscal Period
2022	0	0	0	February
	0	0	0	March
	0	0	0	April
	0	0	0	June
	22	112	241	December
	0	0	0	January
	0	0	0	February
	0	0	0	March
	0	0	0	June
	19	79	152	January

Rows 11 - 20
Analyze - Refresh - Print - Export

Lesson 2: Dashboards and Reports, Cont'd

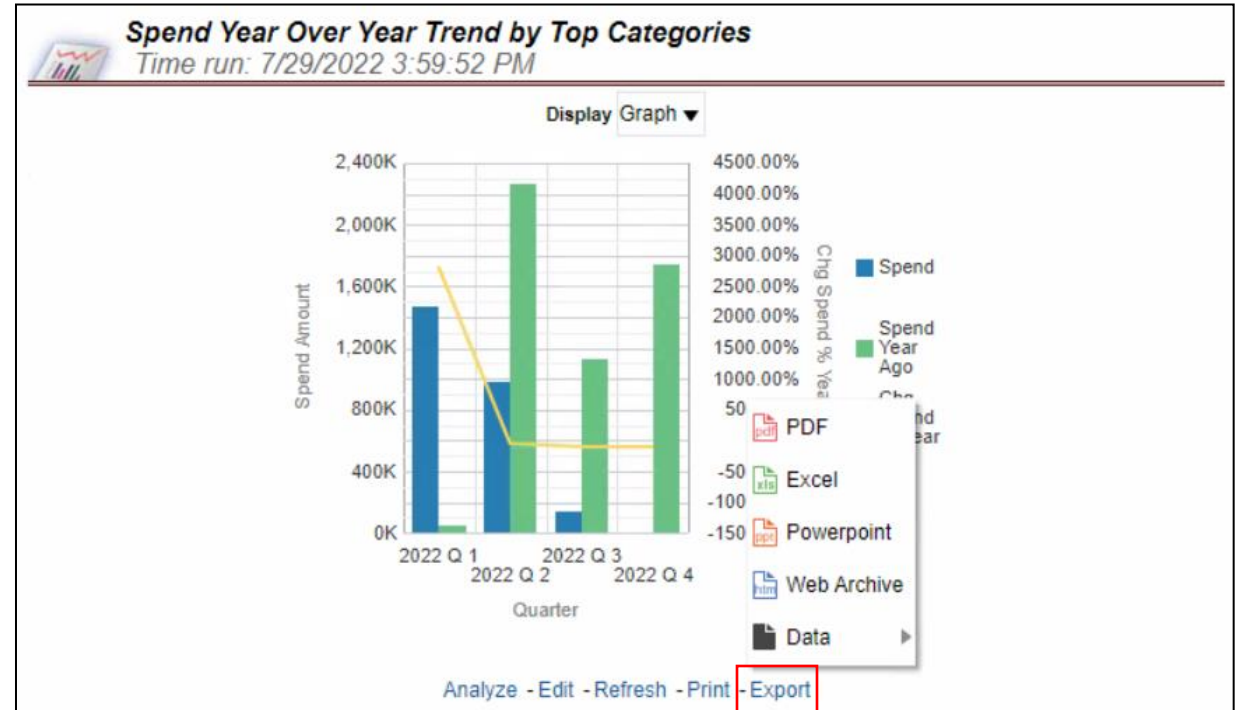
At the bottom of each Report, **Print** and **Export** data from that specific Report.

- Print
 - Printable PDF
 - Printable HTML



Lesson 2: Dashboards and Reports, Cont'd

- Export
 - PDF
 - Excel
 - PowerPoint
 - Web Archive
 - Data (CSV, Tab Delimited, or XML)

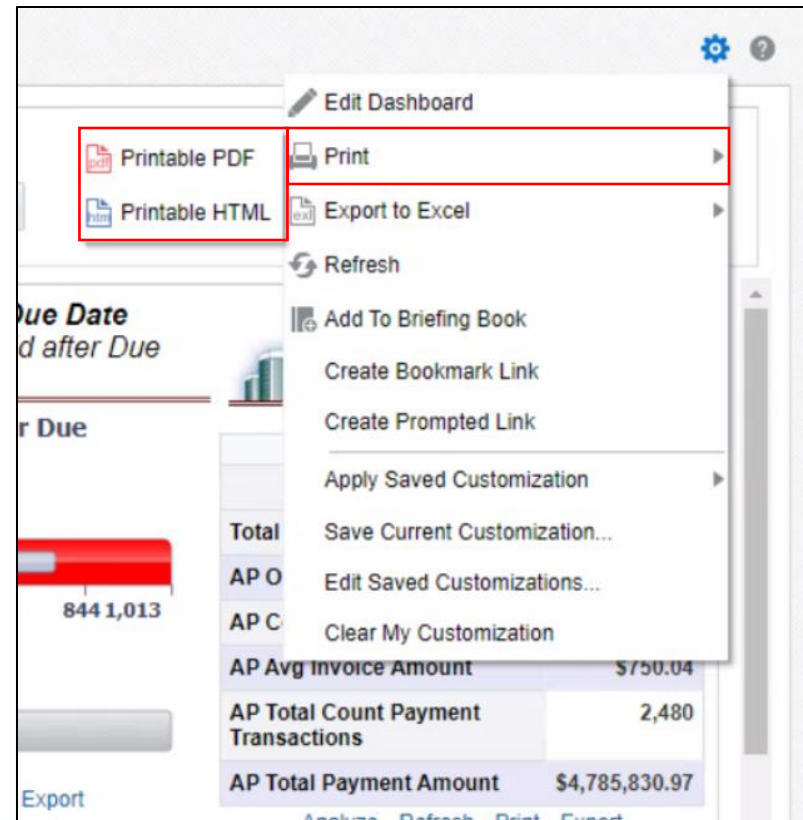


Note: Exporting data to a CSV file opens the file in Excel, which can then save as an Excel file. Printing more than ten (10) rows of data at a time when selecting PDF will result in only the rows that are presently showing on the dashboard.

Lesson 2: Dashboards and Reports, Cont'd

Employees have the ability to print all the Reports on a Dashboard page level.

1. Select on the **Page Options** button in the upper right corner of the Dashboard.
2. Select **Print** and then select either **Printable PDF** or **Printable HTML**.

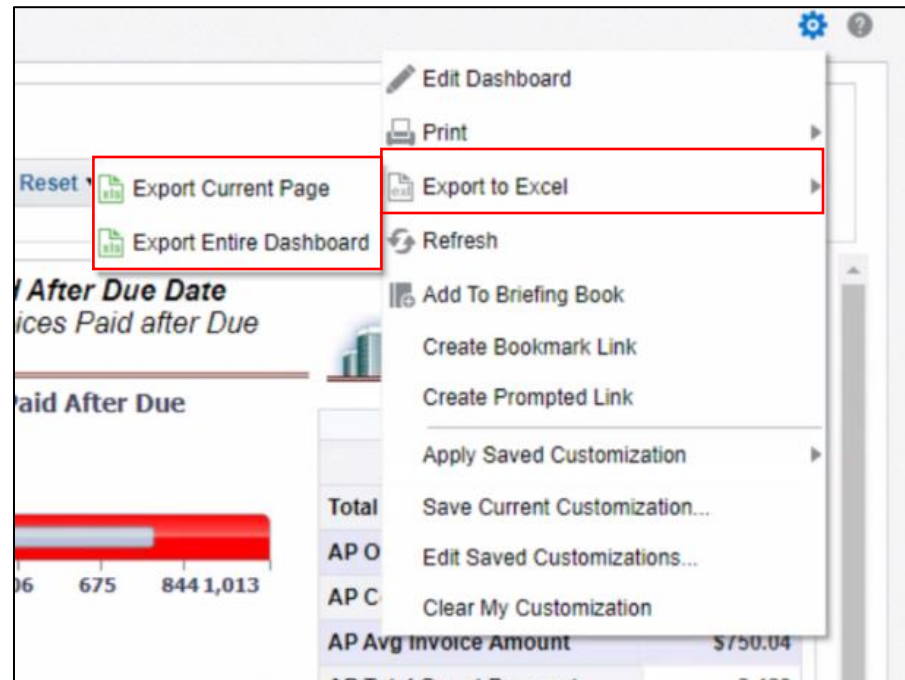


Lesson 2: Dashboards and Reports, Cont'd

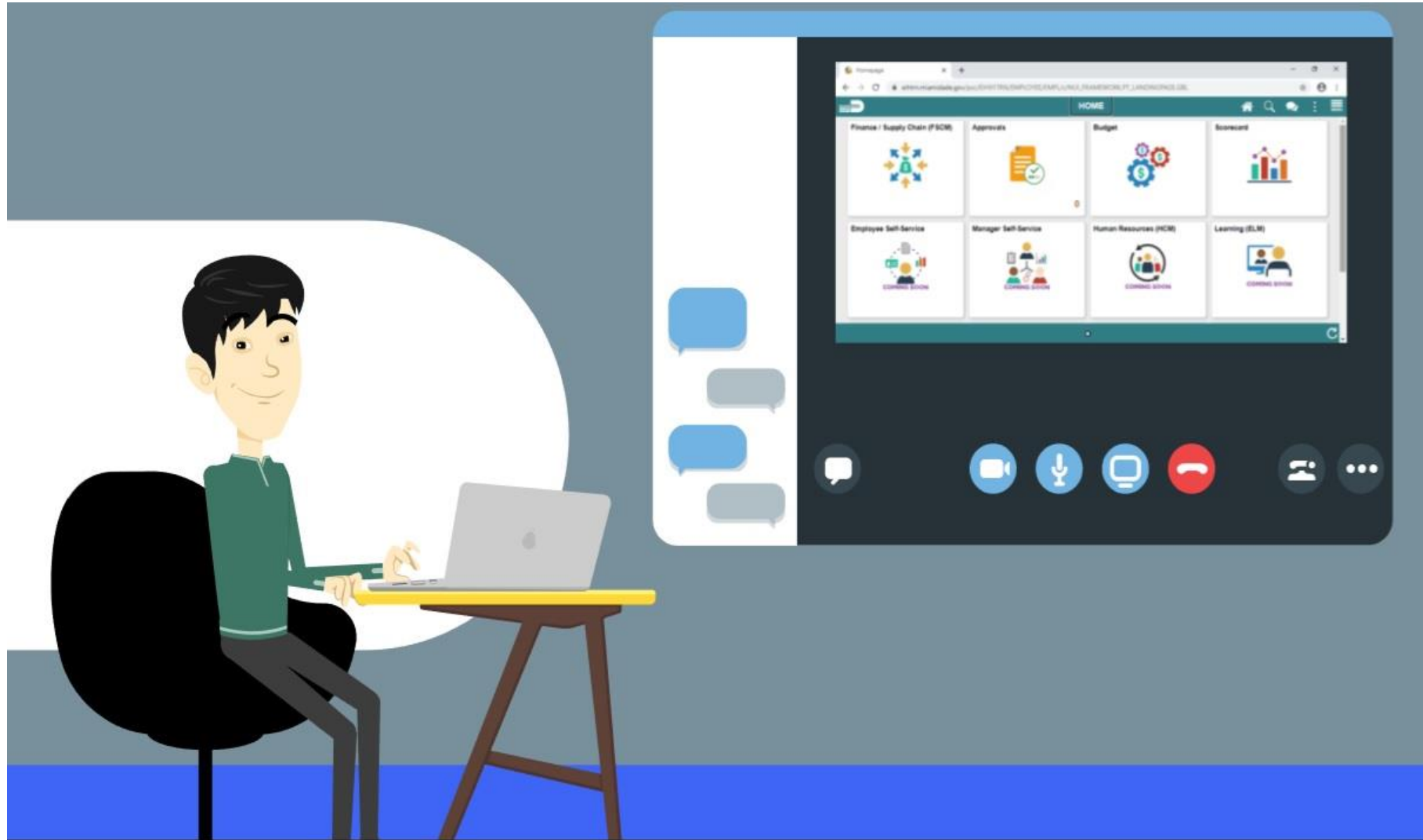
To export a current Dashboard page or all Dashboard pages to Excel.

1. Select on the **Page Options** button in the upper right corner of the Dashboard
2. Select **Export to Excel**
3. Select either **Export Current Page** or **Export Entire Dashboard**

Note: The maximum export file size is 100,000 rows of data. Export to Excel will only print what is displayed on the Dashboard at that moment.



Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Having completed the Create Job Opening lesson, you now know:

- To navigate through INFORMS BI, use the Dashboards link on the Global Header. Use the tabs within each Dashboard to navigate from one Dashboard page to another.
- Prompts are used on each Dashboard page to filter the data into smaller increments.
- Report tables and pivot tables have many features that allow sorting, rearranging columns, and modifying the way the table displays the data.
- There are many different types of report graphics that are used to display data.
- There are different ways to print and export individual reports within INFORMS BI. It is possible to print a whole Dashboard page with multiple Reports.

Lesson 3: Personalization and Finding Help

At the conclusion of this lesson, you will have learned about:

- Saved Customization
- Setting Landing Page
- Understanding Report Results

Lesson 3: Personalization and Finding Help

Personalize a Dashboard page to have certain prompt values automatically populated with a saved customization.

The screenshot displays the Oracle Business Intelligence Procurement dashboard. At the top, there is a search bar and navigation links for Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As T0140725. The main content area is titled 'Procurement' and includes a sub-tab for 'Supplier Performance'. A filter bar is highlighted with a red box, containing dropdown menus for Calendar Year (2022), Calendar Quarter (2022 Q 1), Calendar Month (2022 / 01), Category (--Select Value--), Supplier (--Select Value--), and PO Business Unit (AD). Below the filters, there are two data visualizations: 'Spend by Top Categories' and 'Spend by Top Suppliers'.

Spend by Top Categories

Category Code	Product Name	Spend	% Spend
93890	Veterinary	\$848,622.48	32.22%
32508	Bedding AI	\$360,510.87	13.69%
91039	Janitorial	\$279,748.78	10.62%
96206	Animal Car	\$270,549.93	10.27%
95290	Training a	\$106,428.34	4.04%
96186	Veterinary	\$76,925.69	2.92%
34548	Gloves Saf	\$68,930.00	2.62%
91875	Management	\$63,390.00	2.41%
87558	Pharmaceut	\$38,722.66	1.47%
44539	Hand Tools	\$37,884.59	1.44%
48683	Sanitizing	\$35,356.41	1.34%
20086	Uniforms C	\$32,819.75	1.25%
68505	Bands and	\$25,000.00	0.95%
60072	Multi-Func	\$24,990.09	0.95%
90644	Heating; V	\$24,983.16	0.95%

Spend by Top Suppliers

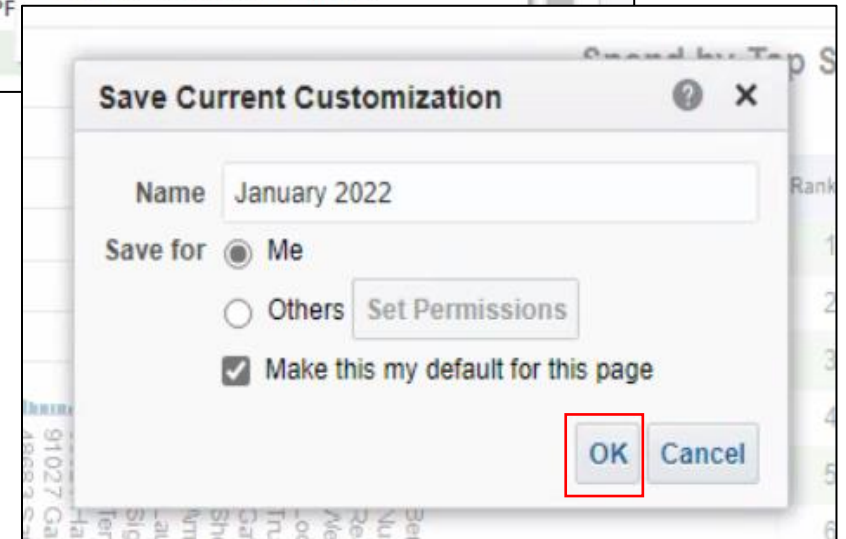
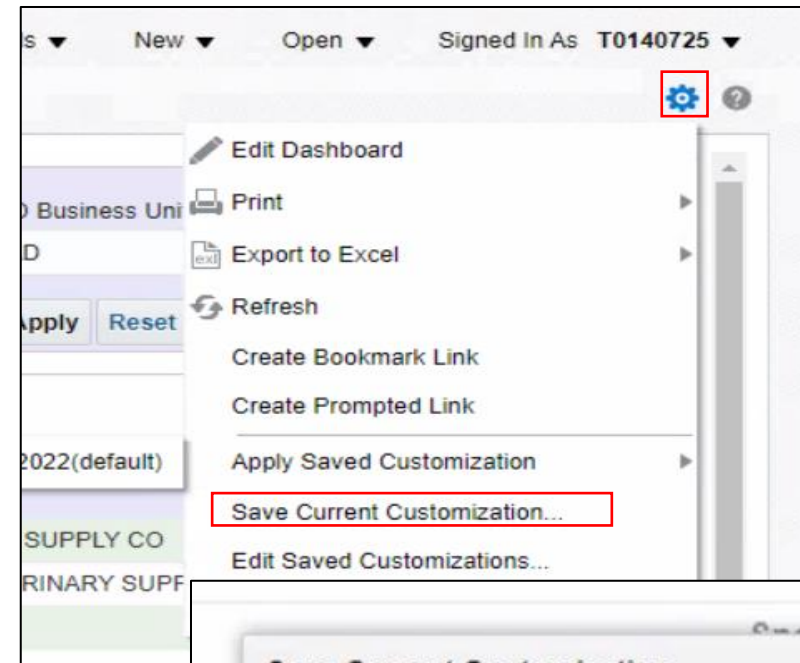
Rank	Supplier Number	Supplier Name	Spend
1	0000013556	MWI VETERINARY SUPPLY CO	\$405,191.99
2	0000004888	PATTERSON VETERINARY SUPPLY INC	\$360,899.93
3	0000005149	LAVCOR LLC	\$319,887.71
4	0000002663	JESUS MARTINEZ	\$291,408.78
5	00000008613	MIAMI VETERINARY FOUNDATION INC	\$169,270.00
6	0000009795	FLORIDA VETERINARY MEDICINE FACULTY	\$106,428.34
7	0000004451	INTERVET INC	\$70,694.46
8	0000011311	JRD & ASSOCIATES INC	\$63,390.00
9	0000016901	PETHEALTH SERVICES USA INC	\$57,812.00
10	0000006311	AGNI ENTERPRISES LLC	\$46,679.60

Lesson 3: Personalization and Finding Help

To personalize a Dashboard page:

1. Navigate to the Dashboard page
2. Select the **Page Options** icon
3. Select the **Save Current Customization**
4. Name the page

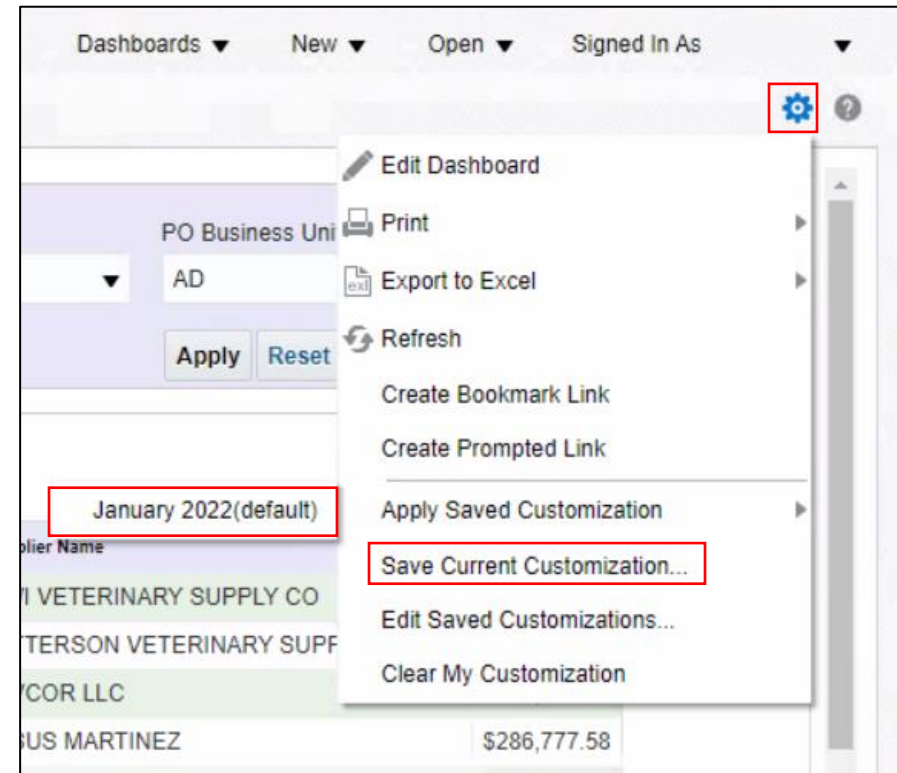
Note: Employees can check the **Make this my default for this page** checkbox option to make the updates default when logging into INFORMS BI.



Lesson 3: Personalization and Finding Help

Employees can create multiple Saved Customizations with different prompt values. To apply another saved Dashboard, take the following steps:

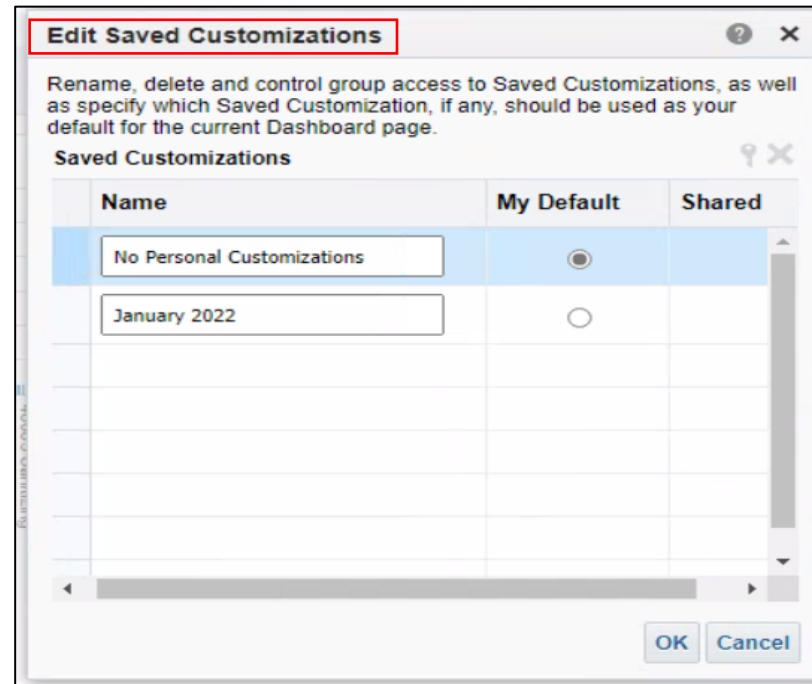
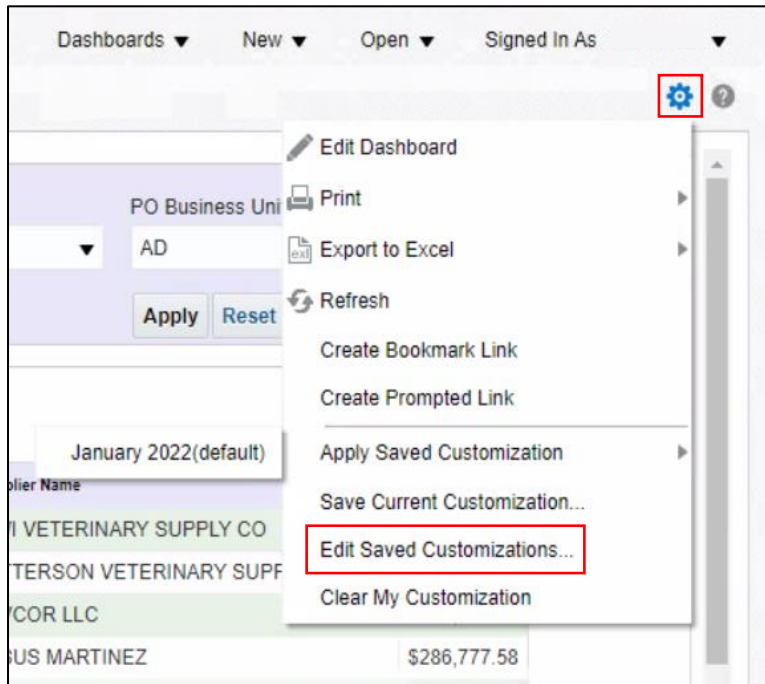
1. Update one of the prompt values
2. Select the Page Options icon
3. Select **Apply Saved Customization**



Lesson 3: Personalization and Finding Help

Modify saved Dashboards by using the **Edit Saved Customization** menu.

1. Select the **Page Options** icon
2. Select **Edit Saved Customizations**

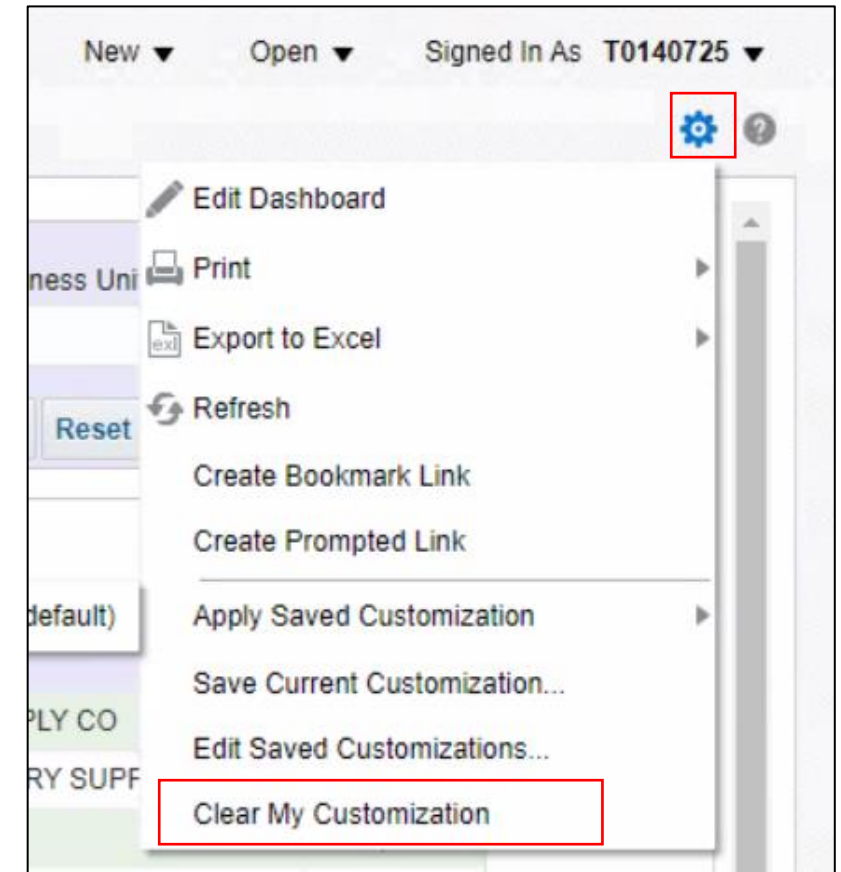


Note: Employees can rename and edit Saved Customizations. It also allows a Page Default selection.

Lesson 3: Personalization and Finding Help

To clear customization and view the INFORMS BI default Dashboard page, take the following steps:

1. Select the **Page Options** icon
2. Select the **Clear My Customization**



Lesson 3: Personalization and Finding Help

It is possible to change the default landing page within INFORMS BI in order to see your most important Dashboard page upon logging in.

1. Select on the arrow next to **Signed In As**
2. Select **My Account**
3. Select the preferred Dashboard Page from the **Starting Page** drop-down.
4. Select **OK**

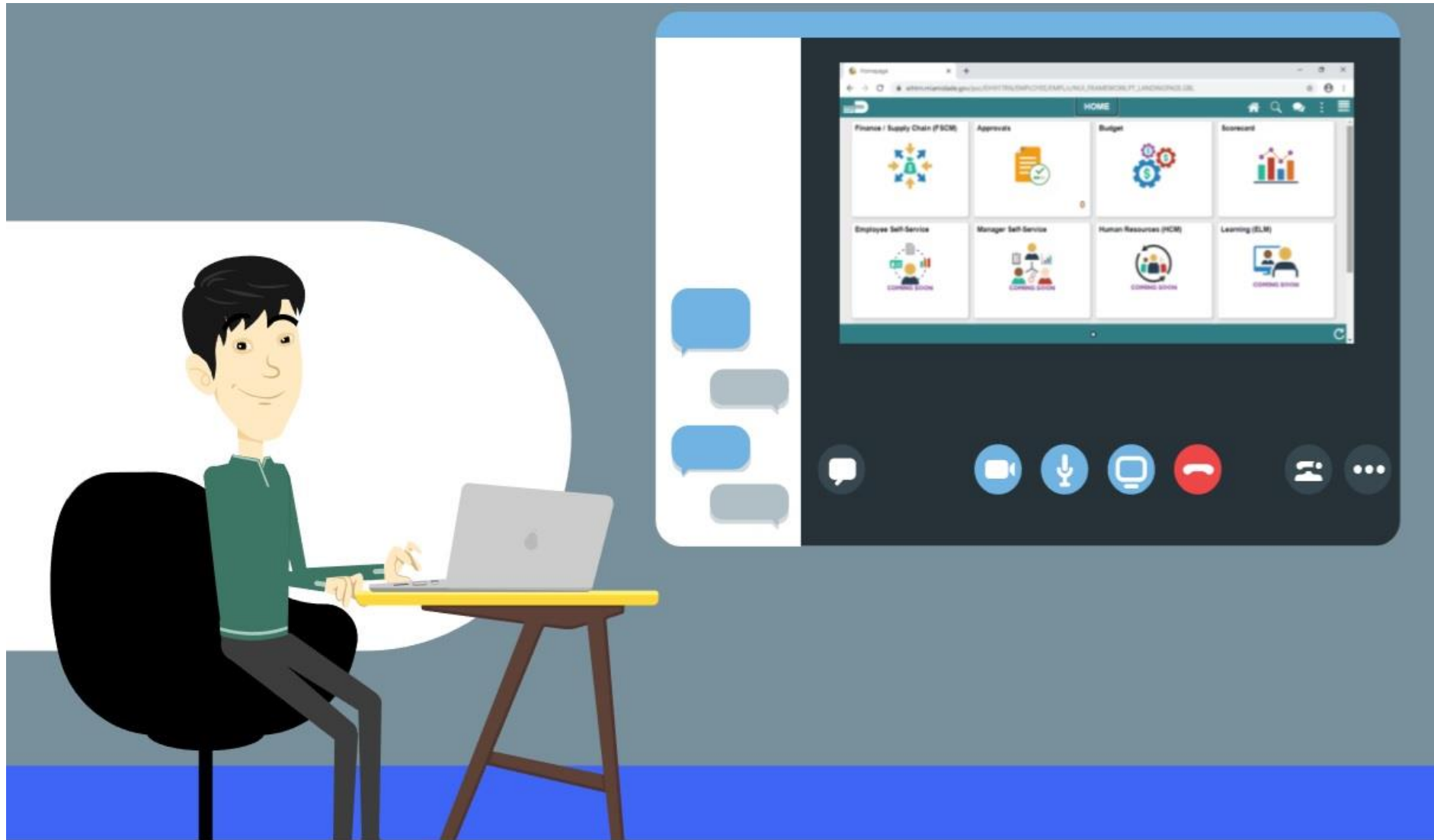
The image shows two overlapping screenshots from the INFORMS BI application. The top screenshot displays the user interface with a search bar and navigation tabs: 'Advanced', 'Administration', 'Help', and 'Sign Out'. Below these, there are 'New' and 'Open' buttons, and a 'Signed In As' dropdown menu showing the user ID 'T0140725'. A red box highlights the 'Signed In As' dropdown and the 'My Account' link below it. The bottom screenshot shows the 'My Account' preferences window. The 'Preferences' tab is selected and highlighted with a red box. The window displays various settings for the user 'T0140725', including 'Starting Page' (set to 'Default'), 'Locale (location)', 'User Interface Language', 'Time Zone', 'Currency', 'Subject Area Sort Order', 'Analysis Editor', and 'Accessibility Mode'. The 'OK' and 'Cancel' buttons are visible at the bottom right of the window.

Lesson 3: Personalization and Finding Help

INFORMS BI Solution technology (OBIA) is best optimized when used with:

- Microsoft Edge 40*
- Microsoft Internet Explorer 11*
- Google Chrome 84+
- Mozilla Firefox 79+
- Apple Safari 9*
- Apple Safari 10*

Lesson 3: Activities and Exercises



Lesson 3: Lesson Summary

Having completed the Create Job Opening lesson, you now know:

- Users can personalize individual Dashboard pages.
- Users can make any available dashboard page a personalized landing page.
- Personalization on a dashboard can be cleared by using the Page Options button.
- When working within the INFORMS BI Solution, it is helpful to use certain browsers, clear the cache, and refresh the page if having issues.
- Report results sometimes are Not Applicable, blank, or show no results.

Course Content Summary

Congratulations on completing the Reporting Capabilities (View Only) Course. You now understand:

- The purpose of INFORMS BI
- How to use the Global Header
- How to access and use dashboards and reports
- Prompts and how to use prompt capabilities to filter report data
- Hierarchy drilldowns and guided navigation between dashboard pages
- Available report features
- Various report and graph types
- How to manipulate report columns
- How to use different print and export options
- How to set default prompts on a dashboard page
- How to set a landing page
- How to clear personalization

For more information on INFORMS, please visit www.miamidade.gov/informs

Additional Training and Job Aids

- For additional information, be sure to visit: www.miamidade.gov/informs
- User Productivity Kits (Available on the INFORMS Training Webpage):
 - Navigate to the General Dashboard
 - Navigate to the Payables Dashboard
 - Navigate to the Procurement Dashboard
 - Navigate to the Spend Analyzer Dashboard
 - Use Search within Prompts
 - Export a Report



CONGRATULATIONS

Congratulations on successfully completing the Reporting Capabilities
(View Only) Course!

BI 021 – Reporting Capabilities (View Only) Course