
INFORMS BI Training Guide

Course Code: BI 021

Course: Reporting Capabilities (View Only)

Course Overview

Course Description	<p>This course provides a comprehensive review of the Super-User processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: INFORMS BI Processes• Module 3: Course Summary
---------------------------	---

Training Audiences	<p>The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related INFORMS access:</p> <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	<p>Participants are required to complete the following End-User Training courses prior to starting this course:</p> <ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help
----------------------	--

Delivery Method	<p>This course is intended to be delivered through Instructor-led Training.</p>
------------------------	---

Estimated Duration	<p>The total duration of this course, when delivered through Instructor-led Training, is 4 hours.</p>
---------------------------	---

Table of Contents

Content	Page
Module 1: Course Introduction	4
Module 2: INFORMS BI Process	14
Lesson 1: INFORMS Business Intelligence Basics.....	15
Lesson 2: Dashboards and Reports.....	25
Lesson 3: Personalization and Finding Help	53
Module 3: Course Summary	64

Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of Analytics
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted INFORMS access for performing related tasks in INFORMS Business Intelligence, participants must:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Course Learning Objectives

At the conclusion of this course, participants will be able to:

- 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

Module 1: Course Introduction

Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Roles and Responsibilities

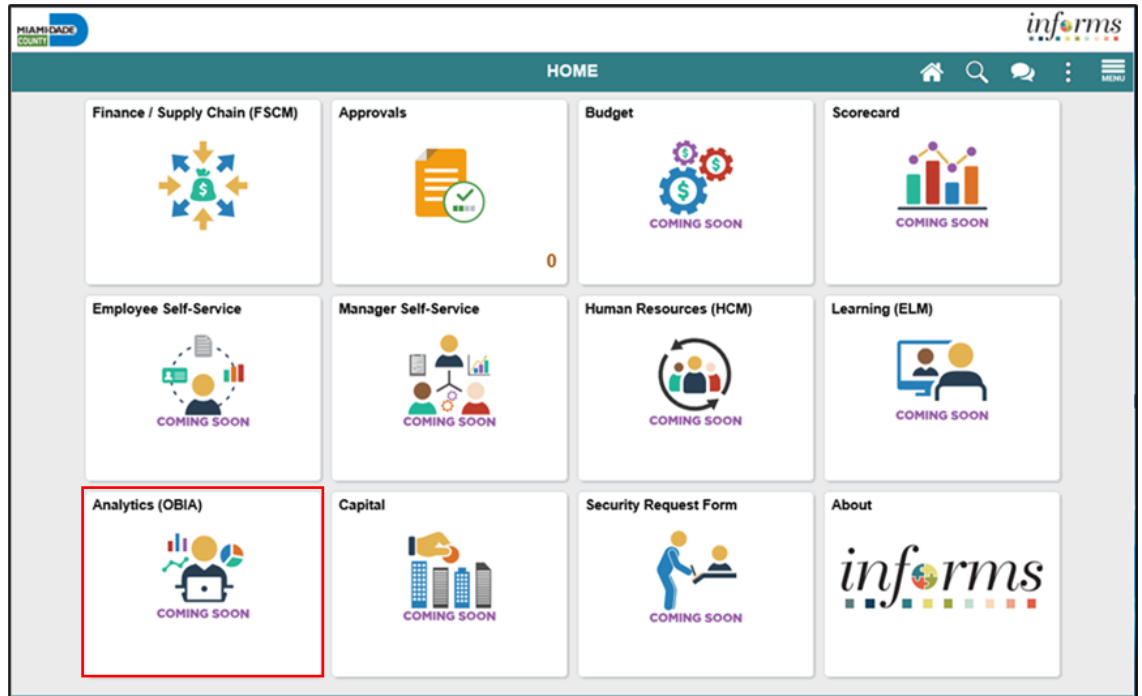
- **Executive User:** The Executive User is responsible for reviewing all dashboard reports for all BU's.
- **Central Procurement User:** The Central Procurement User is responsible for reviewing Procurement dashboard reports for all BU's.
- **Central Finance User:** The Central Finance User is responsible 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.

Module 1: Course Introduction

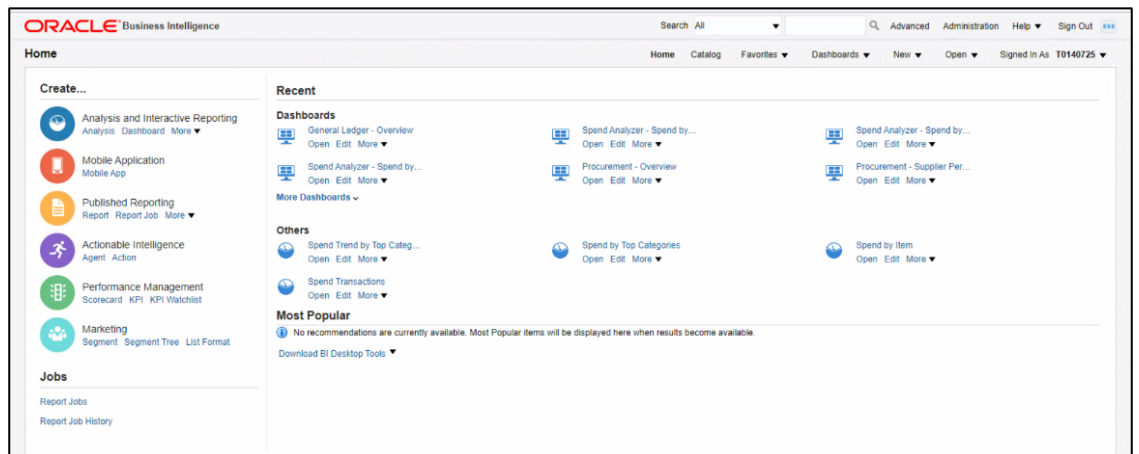
Navigation

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.

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



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

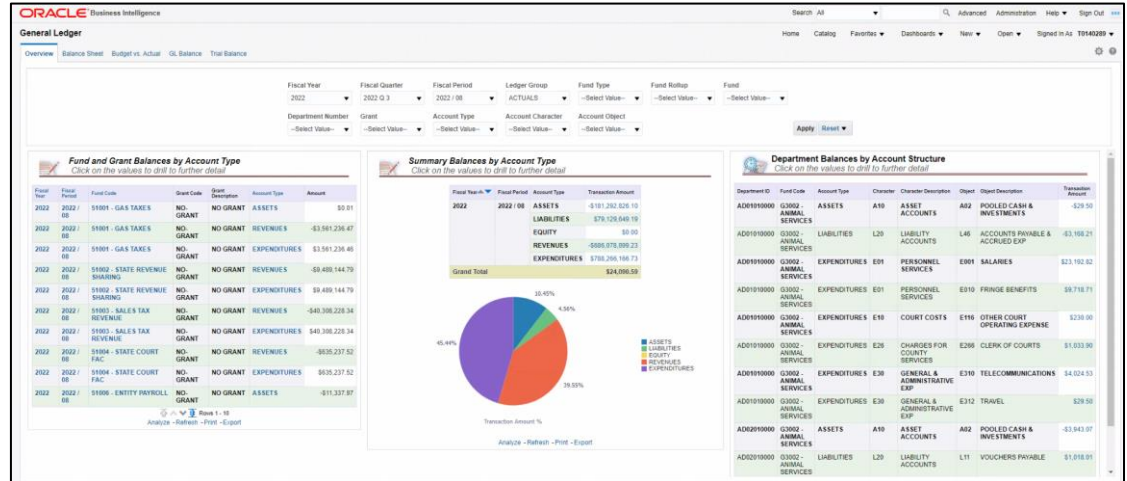


Module 1: Course Introduction

Navigation: Financials

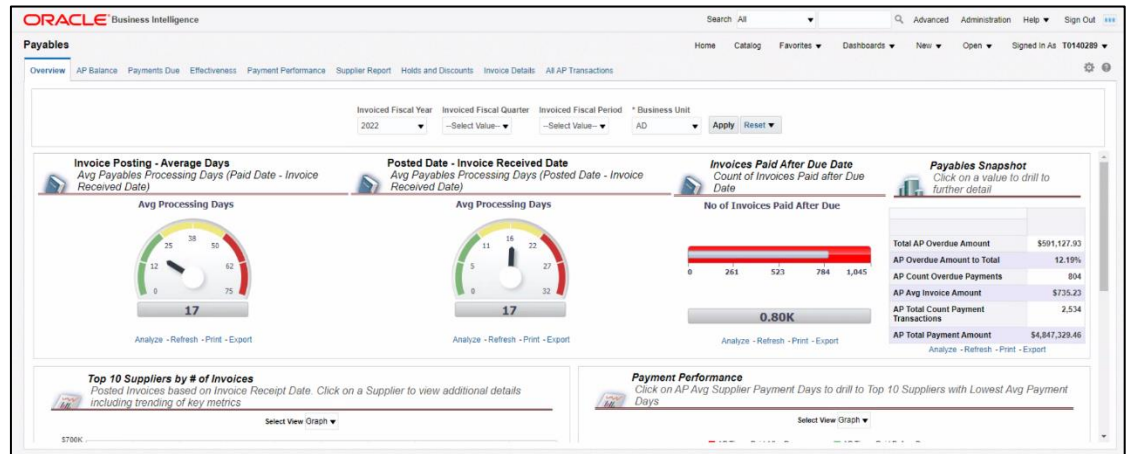
The **General Ledger** Dashboard contains the following tabs:

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



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

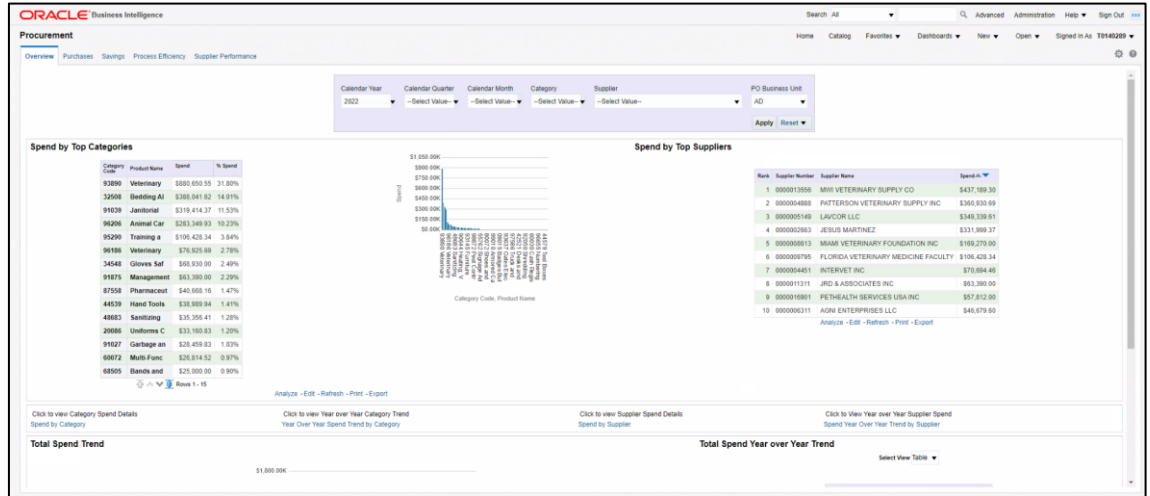


Module 1: Course Introduction

Navigation: Procurement

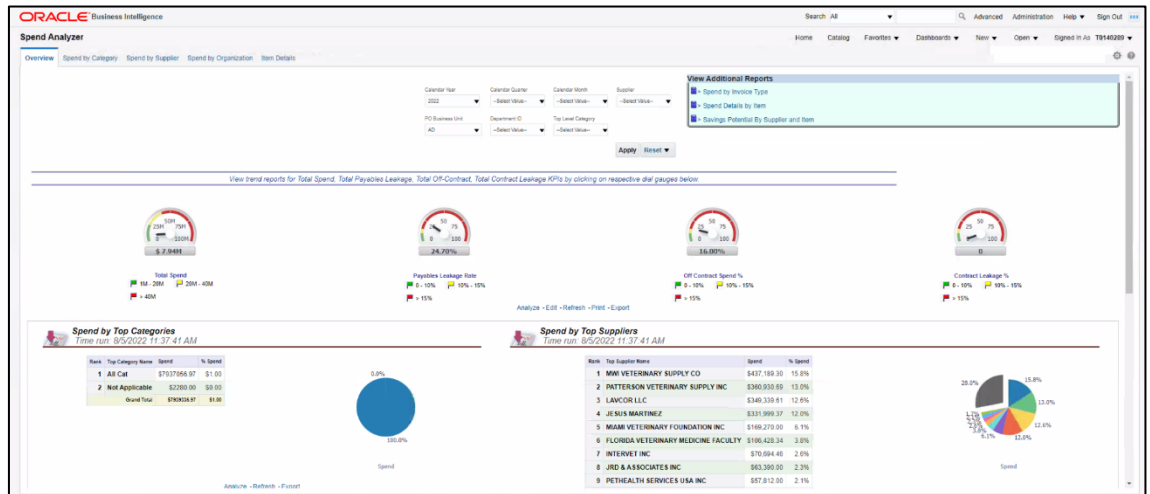
The **Procurement** Dashboard contains the following tabs:

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



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

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



Module 1: Course Introduction

Purpose and Benefits of the Analytics

OBIA (Oracle Business Intelligence Applications)

- INFORMS BI is a multi-purpose interactive dashboard and reporting tool that utilizes OBIA.
- 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.

Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demo



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.

Module 1: Course Introduction

Module 1:
Course
Introduction
Summary

The following key concepts were covered in this module:

- Course Introduction

Module 2: INFORMS BI Process

Module 2: INFORMS BI Process

This module includes the following lessons:

- INFORMS Business Intelligence Basics
- Dashboards and Report
- Personalization and Finding Help

Lesson 1: INFORMS Business Intelligence Basics

Lesson 1: Overview

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: INFORMS Business Intelligence Basics

Key Terms



The following key terms are used in this lesson:

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.

Lesson 1: INFORMS BI Basics

Lesson 1: Introduction

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.

This web-based training teaches the navigation and general use of the INFORMS BI Solution and is not specific to INFORMS. For more detailed information about INFORMS BI, see additional training materials (e.g., UPKs, Jobs Aids) 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. The BI data is refreshed from INFORMS nightly and does not reflect real time information.

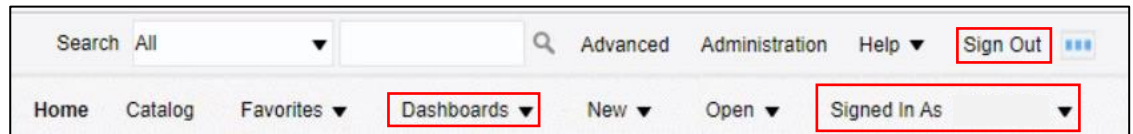
Note: INFORMS BI will grow and expand to include more reports and subject areas. Continue to look for communications about future expansions.

Lesson 1: INFORMS BI Basics

Lecture 1: Global Header

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

- **Dashboards:** Links to all Dashboards that are available to the user (this is the primary way to navigate through the INFORMS BI Solution).
- **Signed In As:** Displays the username and links to My Account, for specific preferences.
- **Sign Out:** Select this link to sign out of INFORMS BI.



Lesson 1: INFORMS BI Basics

Lecture 2: Dashboard and Report Overview

INFORMS is made up of many **Dashboards, Dashboard Pages, and Reports.**

A **Dashboard** is a structure that organizes analytical content (e.g., General Ledger, Accounts Payable, Accounts Receivable, and Employee Expenses). The content on a **Dashboard Page** (e.g., reports, links, visualizations) is usually displayed as one or more reports.

In the below example, the **General Ledger Dashboard** is displayed with the **Overview Dashboard Page** (tab) selected.

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

Total Expenses Trend

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

Expenses by Category

Fiscal Year	Fiscal Period	Account Type	Transaction Amount
2022	2022 / 07	ASSETS	-\$201,092,591.26
2022	2022 / 07	LIABILITIES	-\$144,185,098.76
2022	2022 / 07	EQUITY	\$0.00
2022	2022 / 07	REVENUES	-\$563,119,160.54
2022	2022 / 07	EXPENDITURES	\$1,008,396,850.56
Grand Total			\$0.00

Top 10 Department ID by Expense

Department ID	Fund Code	Account Type	Character	Chc
AD01010000	G3002 - ANIMAL SERVICES	ASSETS	A10	AS AC
AD01010000	G3002 - ANIMAL SERVICES	LIABILITIES	L20	L1F AC
AD01010000	G3002 - ANIMAL SERVICES	EXPENDITURES	E01	PE SE
AD01010000	G3002 - ANIMAL SERVICES	EXPENDITURES	E01	PE SE
AD01010000	G3002 - ANIMAL SERVICES	EXPENDITURES	E10	CC

Employees can utilize the Prompts at the top of each dashboard to filter through the required reports.

Note: Based on the dashboard selection, employees will have access to different Prompts.

In the example below, employees can select the different prompts using the dropdown arrow to narrow down the displayed reports. Once the required prompt is selected, employees can select the **Apply** button to display the results.

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

Lesson 1: INFORMS BI Basics

Lecture 2: Dashboard and Report Overview

In INFORMS BI, 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**.

In this example, the two **Reports** on the **Overview Dashboard Page** (tab) are:

- **Total Expenses Trend**
- **Expenses by Category**

ORACLE Business Intelligence Search All

General Ledger Home Catalog Favorites Dashboard

Overview Balance Sheet Trial Balance

Fiscal Year: 2022

Department Number: --Select Value--

Fiscal Quarter: 2022 Q 3

Grant: --Select Value--

Fiscal Period: 2022 / 07

Account Type: --Select Value--

Ledger Group: ACTUALS

Account Character: --Select Value--

Fund Type: --Select Value--

Account Object: --Select Value--

Fund Rollup: --Select Value--

Fund: --Select Value--

Total Expenses Trend
Click on a Cumulative Expense Amount to drill to further detail

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

Expenses by Category
Click on the values to drill to further detail

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

50.00% 9.97% 7.15%

■ ASSETS
■ LIABILITIES
■ EQUITY

Lesson 1: INFORMS BI Basics

Lecture 2: Dashboard and Report Overview

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 25 Code is "-" | Account Level 25 Description is equal to 01REIMB - PERSONNEL REIMB ACCOUNTS
 and Balancing Segment Level 30 Code is "-" | Balancing Segment Level 30 Name is equal to 51 - STATE REV SHARING/ ENTITY PWYR
 and Ledger Short Name is equal to ACTUALS

[Analyze](#) - [Refresh](#)

There are a few report values that may seem abnormal but are expected. These do not signify that the information is incorrect, rather they are a result of the relationships within the data.

The values are:

- **Blank spaces:** In this example, a cell contains a blank space. This signifies that no monetary transactions exist for that particular field. However, notice that other fields are populated with monetary amounts.

Account Object	Account	2022			
		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: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario

- **Procurement:** Employee will view year over year changes in Spend By Quarter for a specific business unit.
- **Financials:** Employee will view Accounts Payable invoices paid by due date for a specific business unit.

Instructions

This activity is will be performed individually; you must complete it using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors to assist if you have questions.

Lesson 1: Training Exercise

Debrief



1. In INFORMS Business Intelligence, a _____ displays analytical content in the form of multiple reports.
 - A. Web page
 - B. Dashboard Page
 - C. Analysis
 - D. Catalog

2. Which links are available in the Global Header?
 - A. Home, Dashboards, New, Signed In As
 - B. Dashboards, Signed In As
 - C. Open, Home, Dashboards
 - D. Home, Catalog, Favorites, Dashboards, New, Open, Signed In As

Lesson 1: Lesson Summary

Objectives Achieved



Now that you have completed the lesson, you should be able to:

- The INFORMS BI Solution is an 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

Lesson 2: Overview

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: Dashboards and Reports

Key Terms



The following key terms are used in this lesson:

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.
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.

Lesson 2: Dashboards and Reports

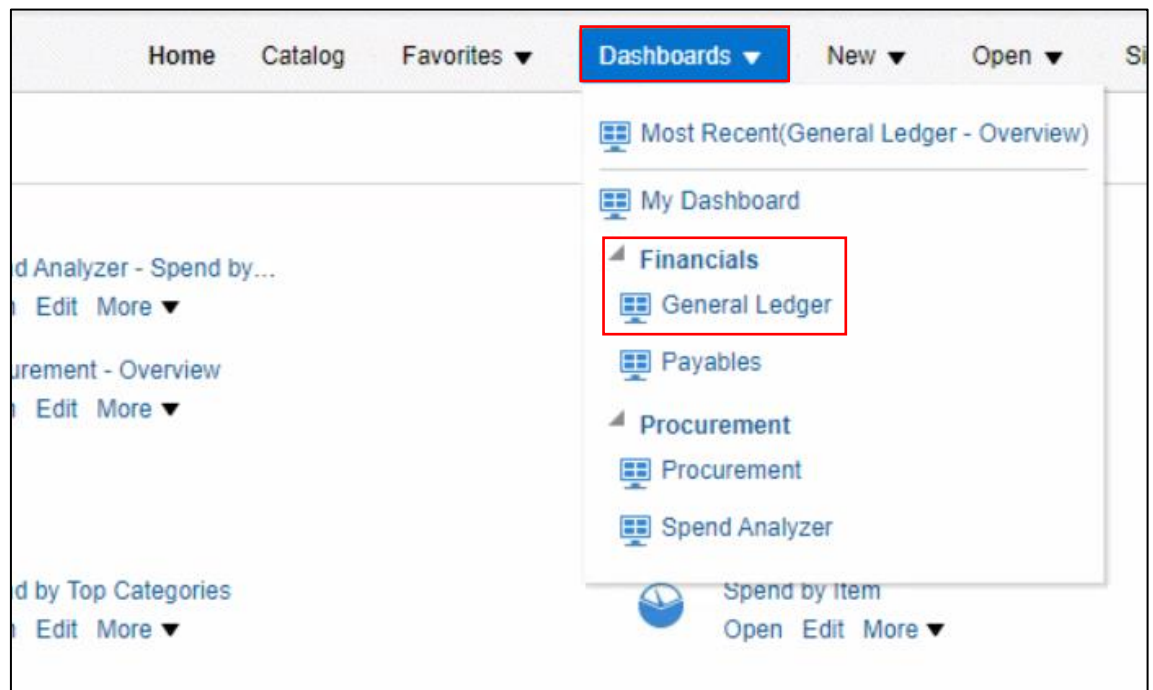
Lesson 2: Introduction

The **Dashboards** button is the key navigational link, allowing movement from one subject area to another in order to view different Reports.

Dashboards are organized by subject areas; a logical grouping of similar content and information (e.g., General Ledger, Payables, Procurement, and Spend Analyzer).

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

For example, to see **General Ledger Reports**, use the following path: **INFORMS > Analytics (OBIA) > Dashboards**



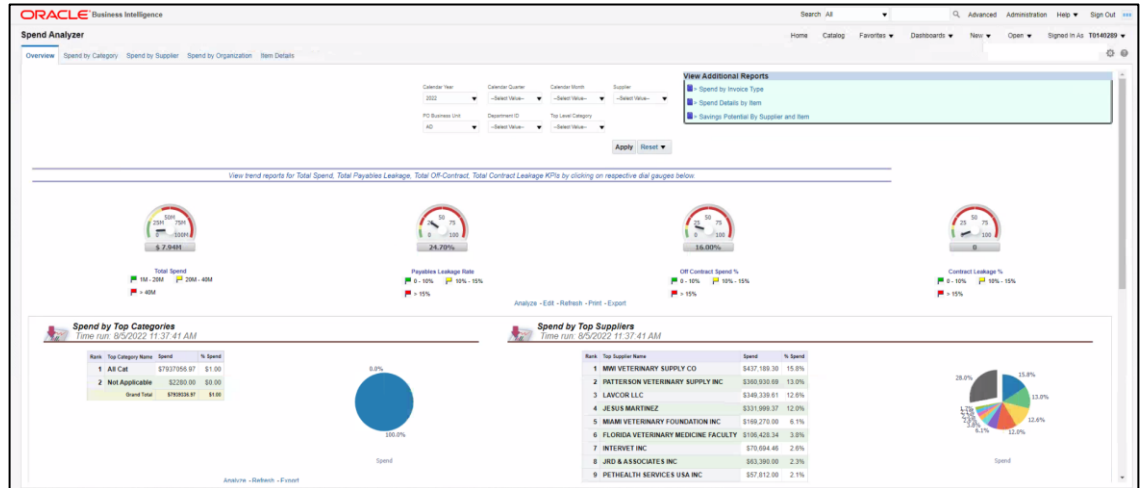
Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

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. In the example below, the **Spend Analyzer** subject area was selected.

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.

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



After a Dashboard is selected, the dashboard select automatically opens the Overview Tab. Employees can navigate to the other subject areas within the **Spend Analyzer** Dashboard. The other subject areas are: **Spend by Category**, **Spend by Supplier**, **Spend by Organization** and **Item Details**.

Most Reports can be accessed through a Dashboard page. This is the primary method of navigation in INFORMS BI.



Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

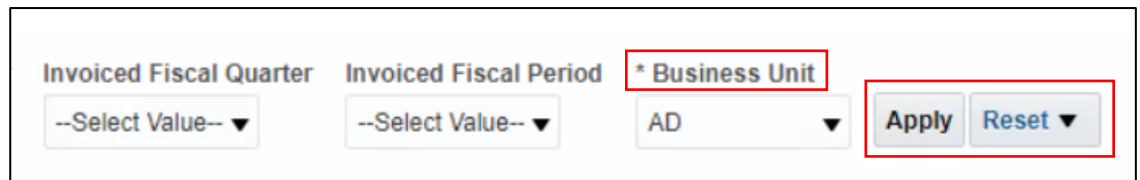
An asterisk (*) indicates that the prompt is a required field, and a selection must be made.

After selecting prompt values, Select the **Apply** button to run the report.

Note: Pressing Enter does not apply prompt values to the Dashboard.

The **Reset** button provides three options:

- **Reset to last applied values** reset all prompt values to the most recently run values
- **Reset to default values:** resets to default prompt values for that Dashboard page
- **Clear All:** clears all prompt values



A screenshot of a dashboard filter section. It contains three dropdown menus: 'Invoiced Fiscal Quarter' (value: --Select Value--), 'Invoiced Fiscal Period' (value: --Select Value--), and '* Business Unit' (value: AD). The '* Business Unit' label and its dropdown are highlighted with a red box. To the right of the dropdowns are two buttons: 'Apply' and 'Reset'. The 'Reset' button has a dropdown arrow and is also highlighted with a red box.



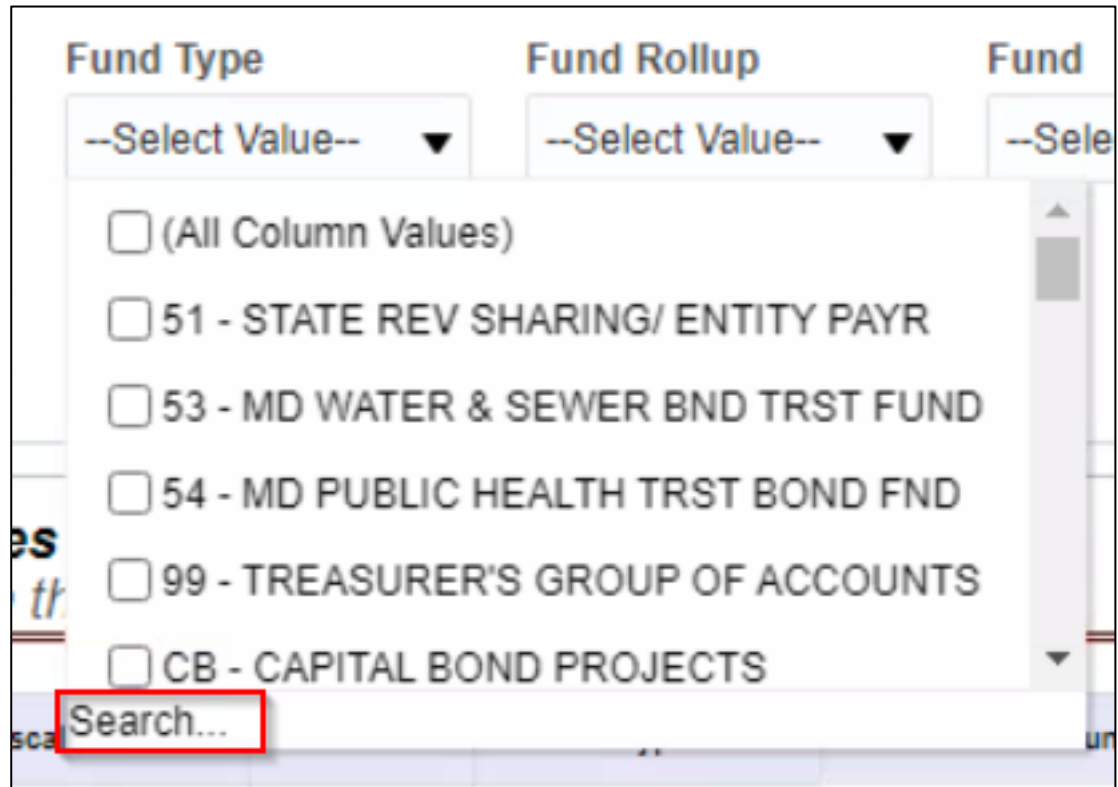
A screenshot showing the 'Reset' dropdown menu. The menu is open, displaying three options: 'Reset to last applied values', 'Reset to default values', and 'Clear All'. The entire menu area is highlighted with a red box. Above the menu, the 'Apply' and 'Reset' buttons are visible. Below the menu, the text 'n this rep' is partially visible on the left, and '2022 Q 4' is displayed in a grey box on the right.

Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

Often the list of values within a prompt is very extensive. 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. A search bar at the bottom of the dropdown is highlighted with a red box. The search bar contains the text 'Search...'. The list of options includes:

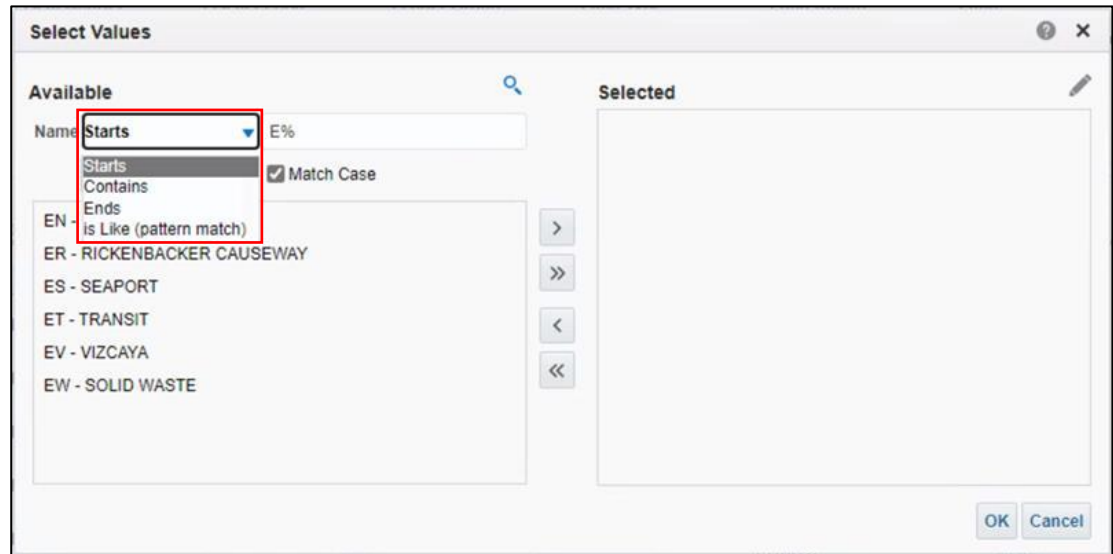
- (All Column Values)
- 51 - STATE REV SHARING/ ENTITY PAYR
- 53 - MD WATER & SEWER BND TRST FUND
- 54 - MD PUBLIC HEALTH TRST BOND FND
- 99 - TREASURER'S GROUP OF ACCOUNTS
- CB - CAPITAL BOND PROJECTS

Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

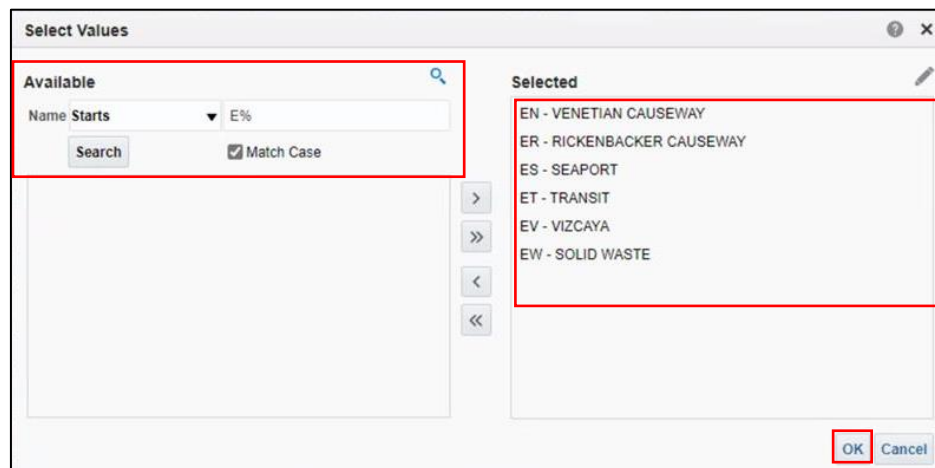
Once the **Search** button has been selected, the **Select Values** window shown below displays.

Select the type of search: **Starts, Contains, Ends, is Like (pattern match)**.



After a search type is chosen, enter the search criteria (in this example “E%”). Move the selected items to the **Selected** box via the **Move** or **Move All** arrows.

Select **OK** to finish, the selected item appears in the prompt field.



Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

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.

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.

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.

The example below displays the following prompts for Financials and Procurement:

- Financials Example:
 - **Fiscal Year**
 - **Fiscal Quarter**
 - **Fiscal Period**
 - **Ledger Group**
 - **Fund Type**
 - **Etc.**

A screenshot of a web interface for Financials prompts. It features two rows of dropdown menus. The first row includes: Fiscal Year (2022), Fiscal Quarter (2022 Q 3), Fiscal Period (2022 / 07), Ledger Group (ACTUALS), Fund Type (--Select Value--), Fund Rollup (--Select Value--), and Fund (--Select Value--). The second row includes: Department Number (--Select Value--), Grant (--Select Value--), Account Type (--Select Value--), Account Character (--Select Value--), and Account Object (--Select Value--). At the bottom right, there are 'Apply' and 'Reset' buttons.

- Procurement Example:
 - **Calendar Year**
 - **Calendar Quarter**
 - **Calendar Month**
 - **Supplier**
 - **Etc.**

A screenshot of a web interface for Procurement prompts. It features two rows of dropdown menus. The first row includes: Calendar Year (2022), Calendar Quarter (--Select Value--), Calendar Month (--Select Value--), and Supplier (--Select Value--). The second row includes: PO Business Unit (AD), Department ID (--Select Value--), and Top Level Category (--Select Value--). At the bottom right, there are 'Apply' and 'Reset' buttons.

Lesson 2: Dashboards and Reports

Lecture 2: Reports

INFORMS BI Reports can be displayed as tables, visualizations, or a combination of the two. **Visualizations** are graphs or charts on a Report.

Examples of types of tables:

- **Table**

Displays results in a visual representation of data organized by rows and columns

- **Pivot table**

Displays data similarly to a standard table but can display multiple levels of both row and column headings.

Table

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 DRAWDN 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

Pivot Table

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

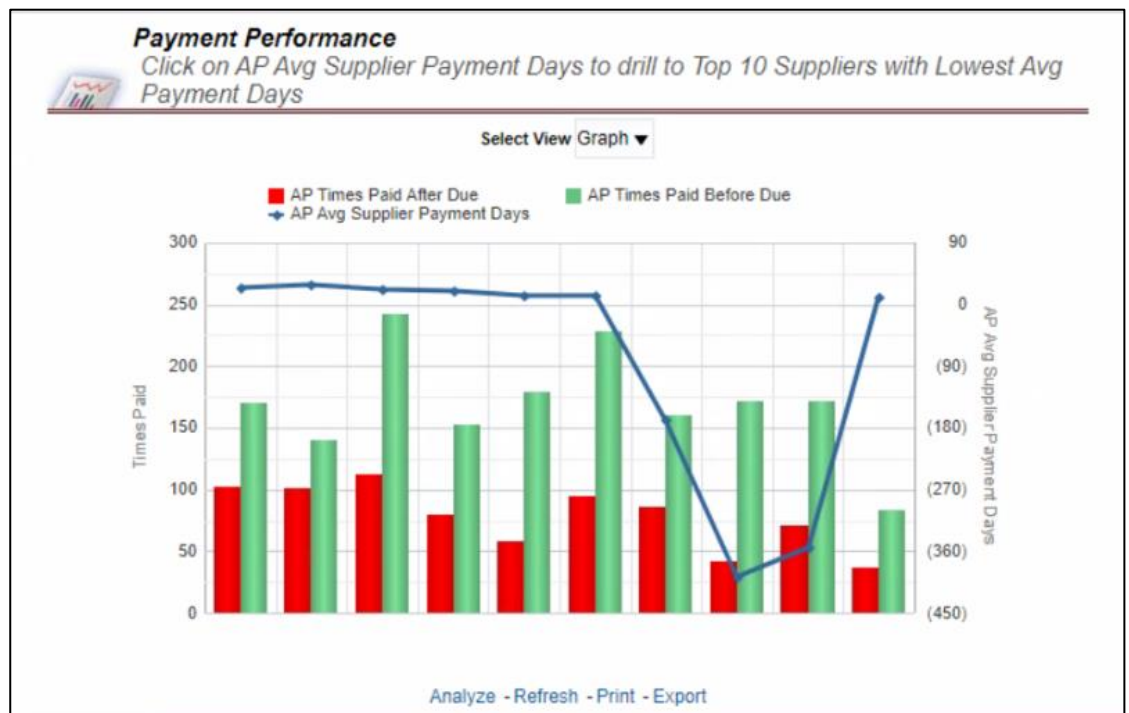
Lecture 2:
Reports

Visualizations available in INFORMS BI include:

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).

Graph



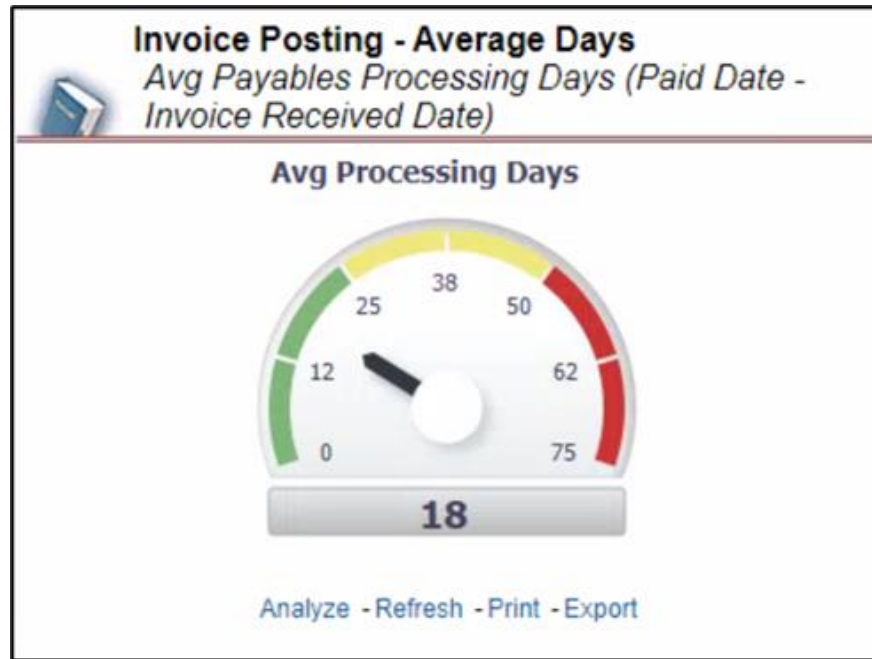
Lesson 2: Dashboards and Reports

Lecture 2: Reports

Gauge

Plots 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).

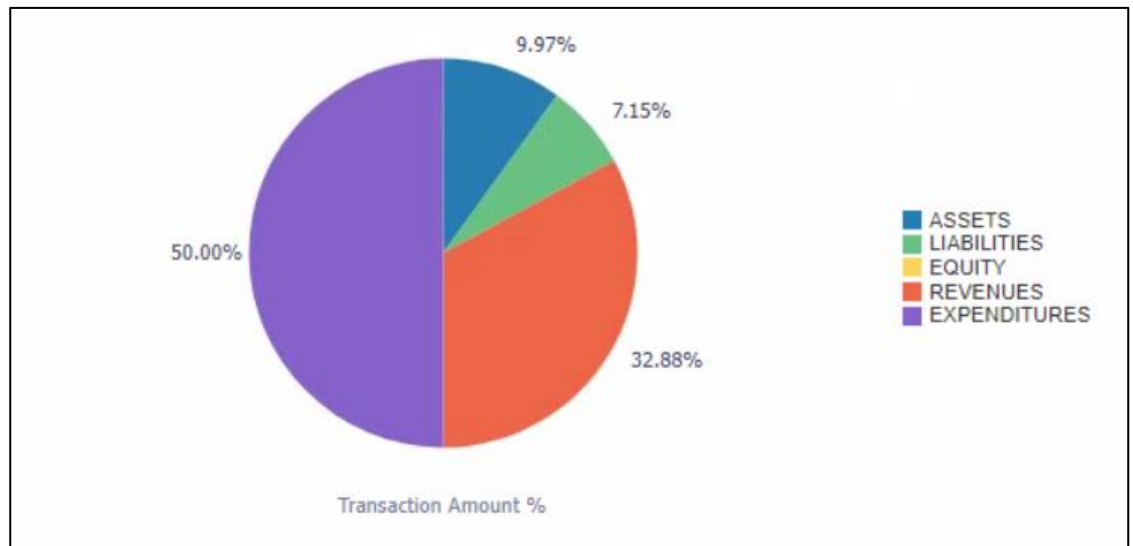
Gauge



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.

Pie Chart



Lesson 2: Dashboards and Reports

Lecture 2: Reports

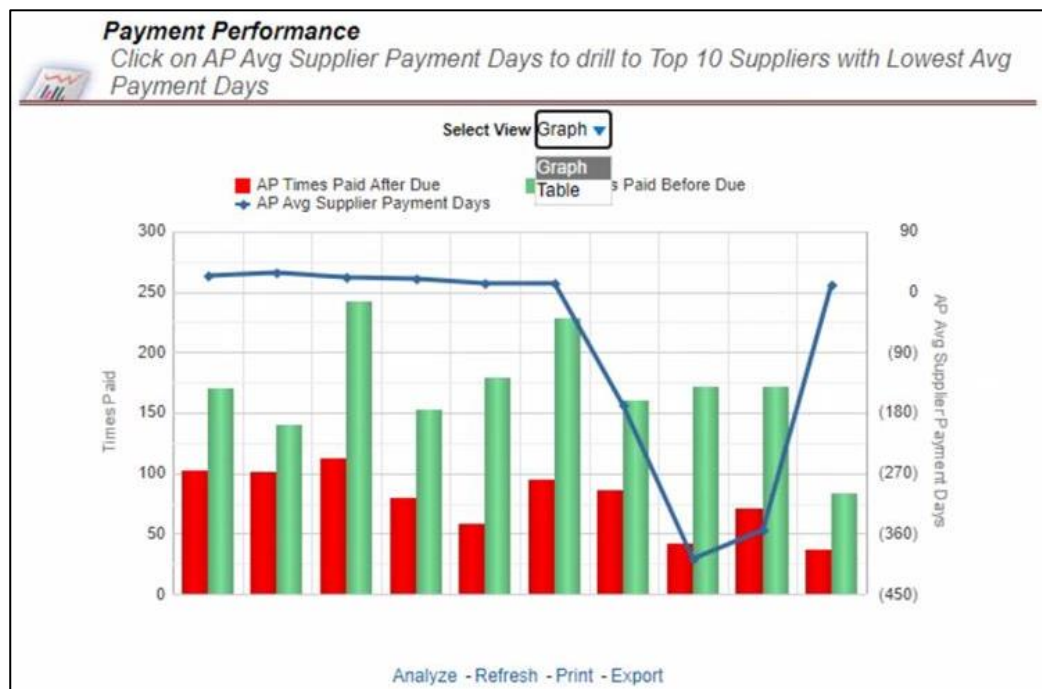
INFORMS BI have different types of view when analyzing a report. In the next report visualizations, we will see the different views available employees can select from to narrow down their results.

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.

In this example, the **Select View** list provides the following options:

- **Graph**
- **Table**



Lesson 2: Dashboards and Reports

Lecture 2: Reports

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.

In the example below, the **Display** list provides the option to select and view **Summary by Quarter** or **Details by Category** in the analysis.

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



Lesson 2: Dashboards and Reports

Lecture 2: Reports

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.

For example, the Fund and Grant Balances by Account Type displays information starting at the Fiscal Period. Select on column header **Fiscal Period** to drill down to **Fiscal Date**.

Note: blue text indicates that a drill down is available.

The number of drilldown levels varies for each Report. Some Reports may only have two levels to drilldown and others may have three, four, or five levels. Drilldowns are based on pre-established levels.

Navigate to **Analytics (OBIA) > Dashboards > Financials > General Ledger > Overview > Fund and Grant Balances by Account Type**

 <i>Click on the values to drill to further detail</i>						
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

Lecture 2: Reports

Employees can drill down on a specific code or description. The images below will show an example of using this drill down option.

To drill down on the **Fiscal Period** until **Fiscal Date** is displayed. For more detailed information about drilldowns see the **Job Aid** section located on the INFORMS website.

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

Lecture 2: Reports

Guided Navigation allows movement from one Report to another Report with selected information from the first Report passed through to the second Report.

Numbers that appear as a hyperlink signifies that it is possible to use this data to navigate to another Dashboard or Report.

When selecting on the hyperlinked data, a button appears with the report name on it (e.g., Expenditure by Account and Program). Selecting this button allows the information from that cell to be passed to the next Dashboard or Report.

General Ledger

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

Fiscal Year: 2022 Ledge: ACTI

Monthly GL Account Balance The Equity Balance

Natural Account	2022 Q 1		
	2022 / 01	2022 / 02	2022 / 03
▶ ASSETS	5,430,370,534.27		91,643,280.00
▶ LIABILITIES	-6,443,530,045.00		358,116,610.00
▶ EQUITY	889,124,982.00		889,124,982.00
▶ REVENUES	-286,755,221.00		995,642,790.00
▶ EXPENDITURES	410,789,751.34	2,131,538,719.62	7,672,991,140.00

Account Character

Account Object

Account

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

Lecture 2: Reports

Selecting on the report name opens another Report that has the information that was passed on. For example, Selecting the **Account Character** button 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.

Guided Navigation allows movement between Dashboards or Reports easily without having to input specific prompt criteria to find specific information.

Monthly GL Account Balance

Natural Account	2022 Q 1		
	2022 / 01	2022 / 02	2022 / 03
▶ ASSETS	5,430,370,534.27		91,64
▶ LIABILITIES	-6,443,530,045.00		558,11
▶ EQUITY	889,124,982.00		889,12
▶ REVENUES	-286,755,221.00		995,64
▶ EXPENDITURES	410,789,751.34	2,131,538,719.62	7,672,99

Dropdown menu options:

- Account Character
- Account Object
- Account

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](#)

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

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	\$5,401,3
▶ A05 - INVESTMENTS	\$96,478,414.97	\$108,948,628.60	\$105,3

Lesson 2: Dashboards and Reports

Lecture 2: Reports

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

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.

Include column

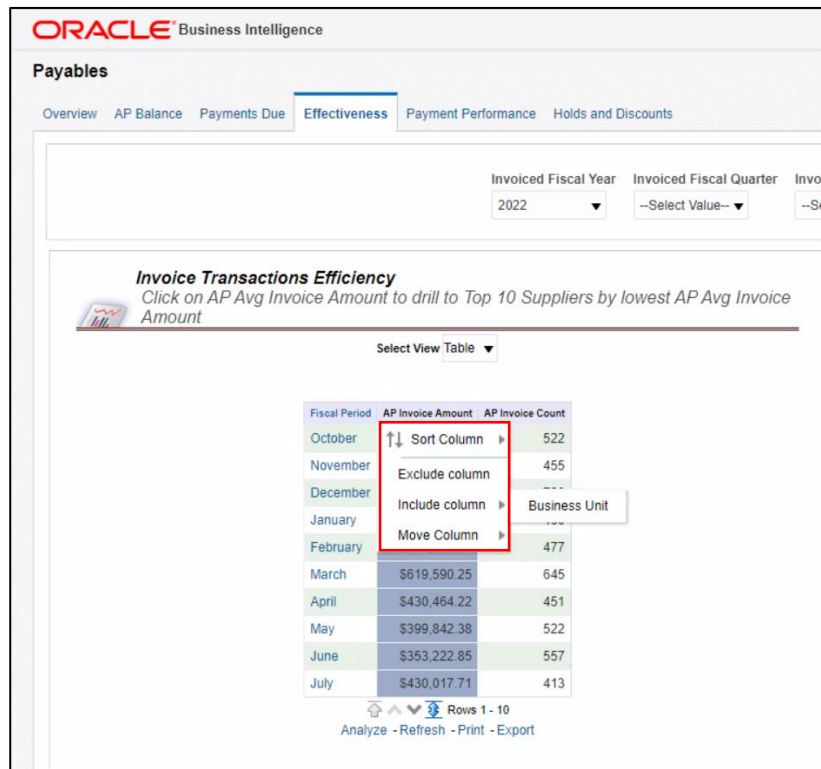
Lists the columns available to add into the table. Including a column will break out the table values based on this column.

Move Column

Allows to manipulate the data and move a particular column to see the data in a different way. Move the column within the table, make the column a prompt for the Report, and create multiple table sections based on the column values.

A column may be moved in the following ways: Left, Right, To Prompts, and To Sections. Dragging the columns to the desire location is available.

Note: The updates made by each employee does not impact others view. Once an employee selects another report or exist the report, the view is updated to its default.



Lesson 2: Dashboards and Reports

Lecture 2: Reports

There are multiple ways to reset tables after the columns have been rearranged. Selecting **Refresh** under the table will reset the columns, or use the **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 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

Rows 1 - 10 | Analyze | **Refresh** | Print - Export

alog | Favorites | Dashboards | New | Open | Signed In As T0140725

PO Business Unit: AD | Apply | Reset

Suppliers

January 2022(default)

Supplier Number	Supplier Name	
0000013556	MWI VETERINARY SUPPLY CO	
0000004888	PATTERSON VETERINARY SUPP	
0000005149	LAVCOR LLC	
0000002663	JESUS MARTINEZ	\$286,777.58
0000008613	MIAMI VETERINARY FOUNDATION INC	\$169,270.00
0000009795	FLORIDA VETERINARY MEDICINE FACULTY	\$106,428.34

- Edit Dashboard
- Print
- Export to Excel
- Refresh**
- Create Bookmark Link
- Create Prompted Link
- Apply Saved Customization
- Save Current Customization...
- Edit Saved Customizations...
- Clear My Customization**

Lesson 2: Dashboards and Reports

Lecture 2: Reports

Breadcrumbs identify the employee’s current location in INFORMS BI and to view the path used to get there. Breadcrumbs are active links that can be used to navigate back through to the original starting point.

In this example, we have navigated to the **Total Expenses Trend** by the **General Ledger Overview**. The breadcrumbs are highlighted.

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

Rows 1 - 10

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

[General Ledger: Overview](#) > [Fund and Grant Balances by Account Type](#)

Lesson 2: Dashboards and Reports

Lecture 2: Reports

Use the **Return** button on a report page to display the original Report or the previous page of the report.

In the example, 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

Lecture 2: Reports

In INFORMS BI, the defaulted rows of data depend on each 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 output
- 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

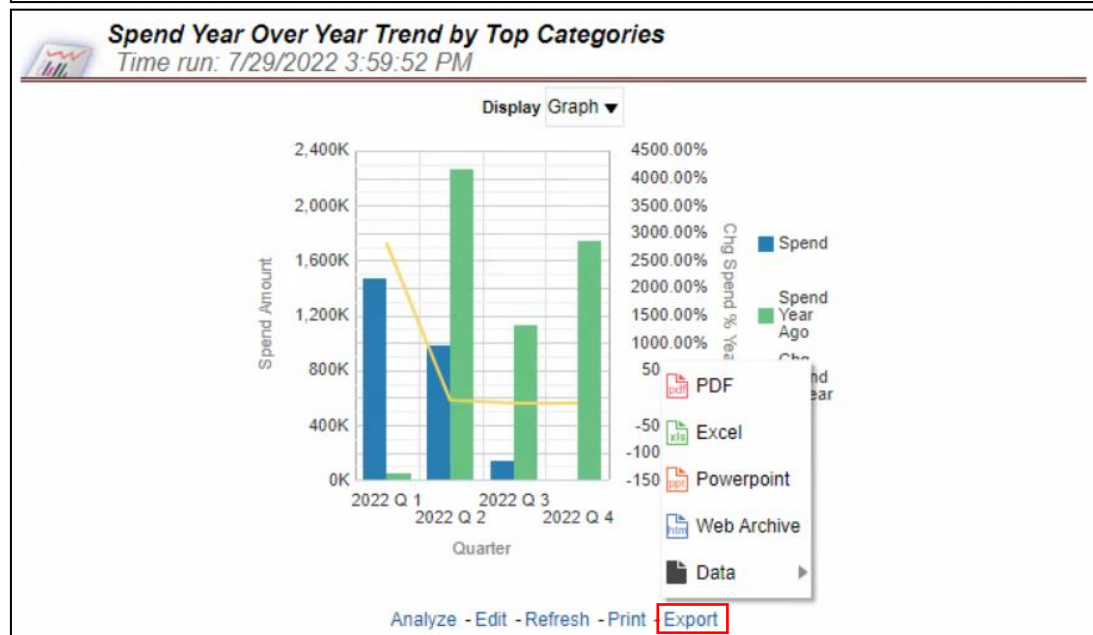
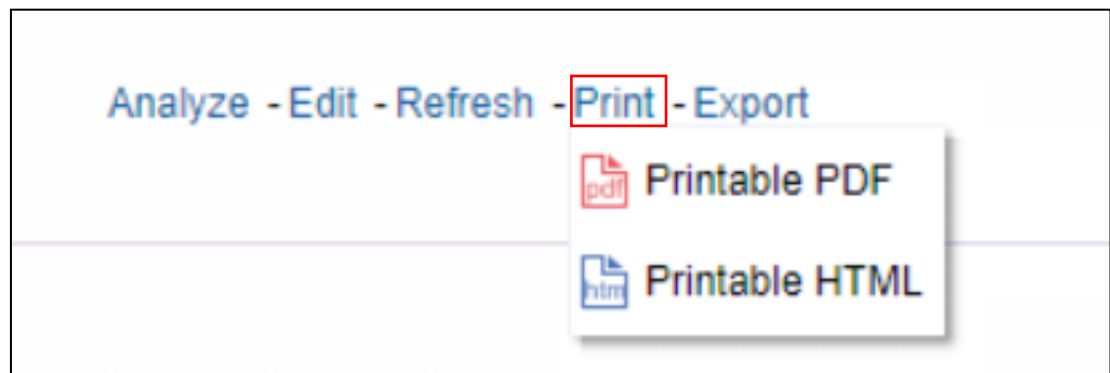
Lecture 2: Reports

At the bottom of each Report, print and export data from that specific Report.

- Print
 - Printable PDF
 - Printable HTML

- 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.



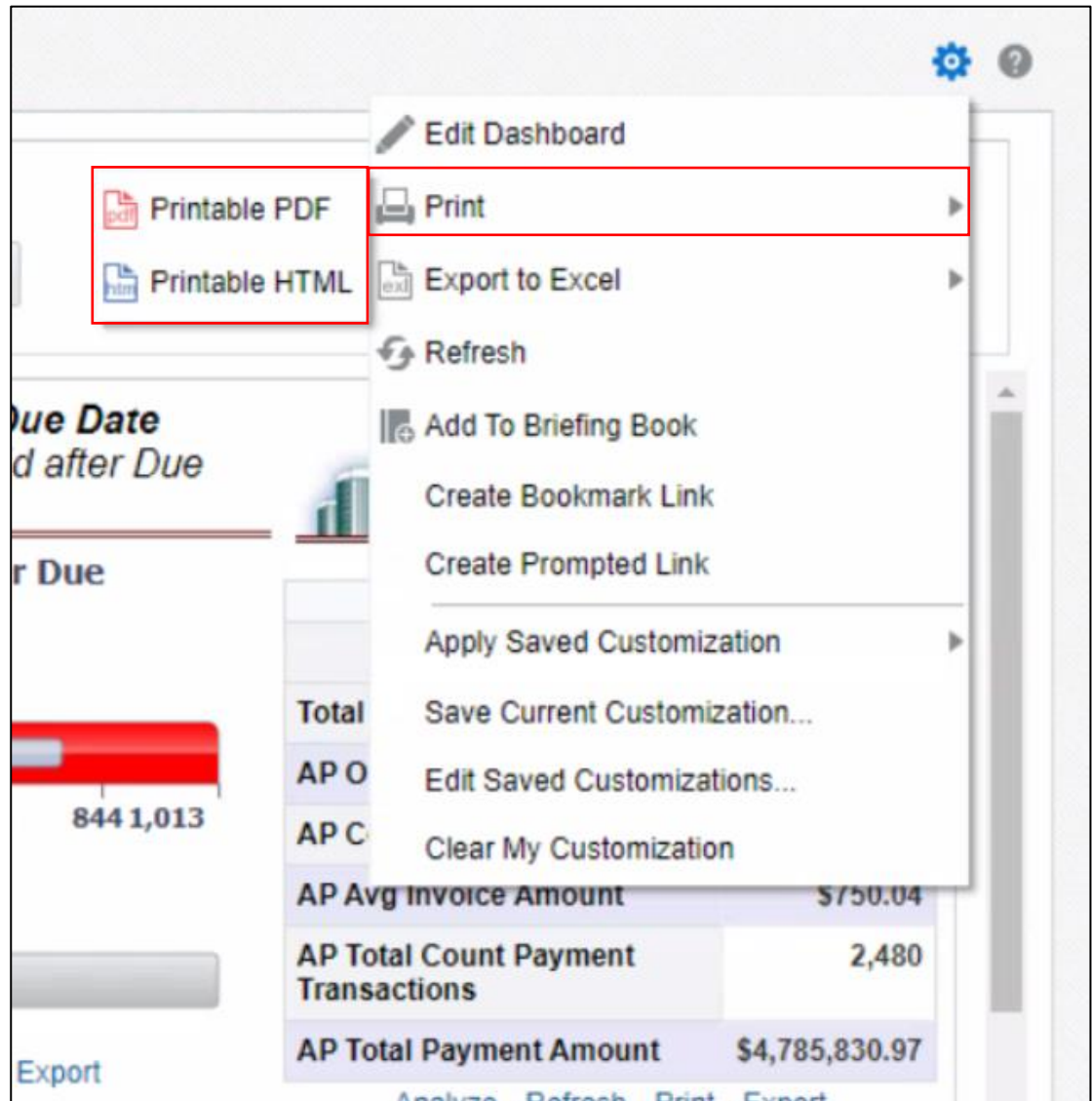
Lesson 2: Dashboards and Reports

Lecture 2: Reports

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

1. Select on the **Page Options** button in the upper right corner of the Dashboard. Select **Print** and then select either **Printable PDF** or **Printable HTML**. The Dashboard is now ready to print.

This is beneficial to see all Reports on the Dashboard page with the same prompt values associated to each.



Note: Print PDF will only print what is displayed on the Dashboard at that moment.

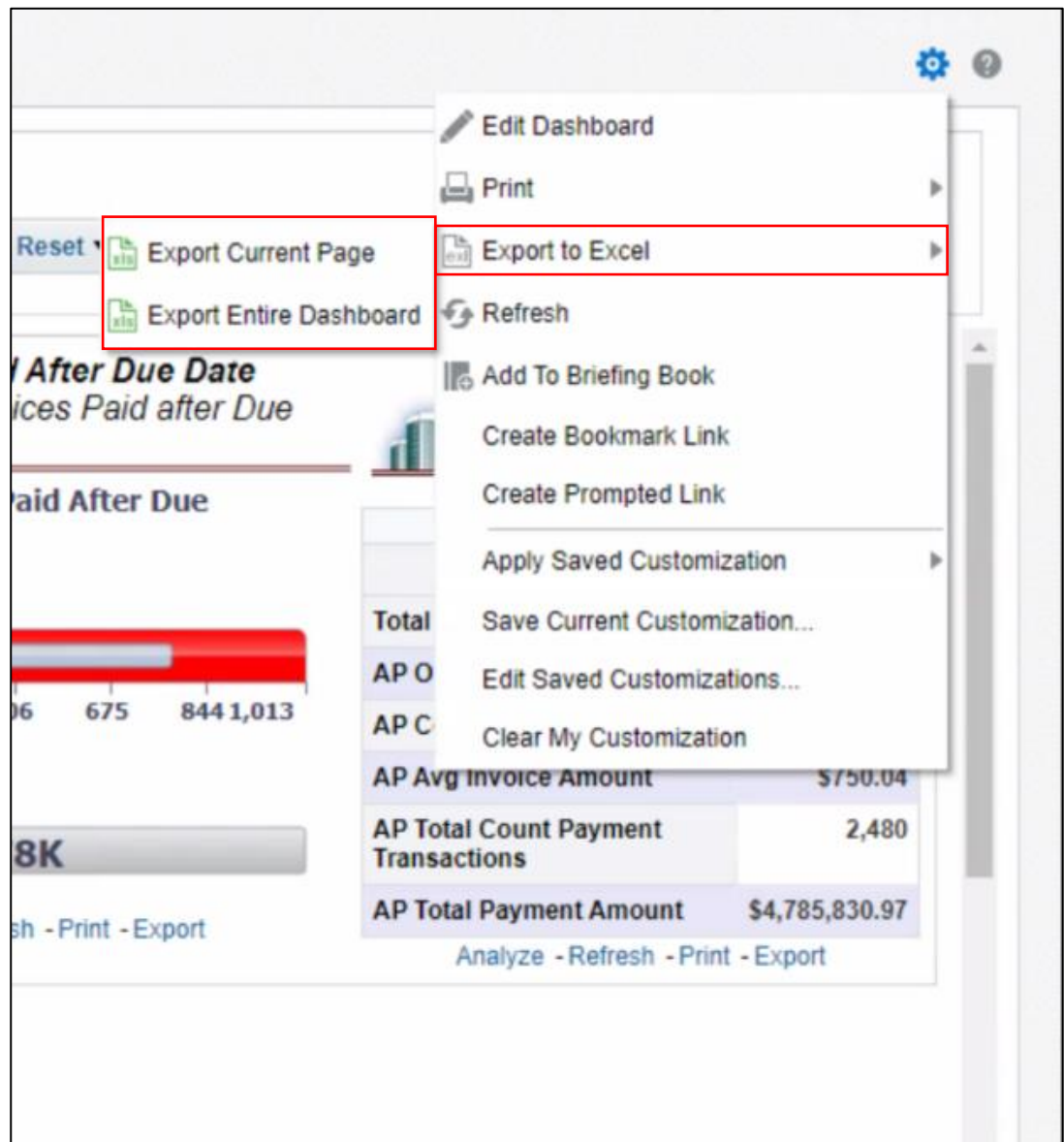
Lesson 2: Dashboards and Reports

Lecture 2: Reports

Employees have the ability to export a current Dashboard page or all Dashboard pages to Excel.

2. To export a current Dashboard page or all Dashboard pages to Excel, Select on the **Page Options** button in the upper right corner of the Dashboard. Select **Export to Excel** and then select either **Export Current Page** or **Export Entire Dashboard**. The exported Dashboard page(s) will open in an Excel file.

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: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario

- **Procurement:** Employee's will view receipt date exceptions data by Supplier.
- **Financials:** Employee's will view drill-downs and export the AP balance.

Instructions

This activity will be performed individually; you must complete it using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors to assist if you have questions.

Lesson 2: Training Exercise

Debrief



1. The Dashboards link on the Global Header allows you to move to different Subject Areas that contain Dashboard Pages and Reports.
 - A. True
 - B. False

2. If you change a prompt value, the results on the dashboard will automatically update.
 - A. True
 - B. False

3. A report can:
 - A. Have hyperlinked values that lead to another report with the information associated
 - B. Have a dropdown selection for different possible columns
 - C. Have the option to drilldown on hierarchies to see information in a more detailed manner
 - D. All of the above

Lesson 2: Lesson Summary

Objectives Achieved



Now that you have completed the Dashboards and Reports lesson, you should be able to:

- 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

Lesson 3: Overview

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

- Saved Customization
- Setting Landing Page
- Understanding Report Results

Lesson 3: Personalization and Finding Help

Lecture 1: Personalization

Personalize a Dashboard page to have certain prompt values automatically populated with a saved customization. In this example, the Saved Customization sets the Calendar Year prompt to include 2022 and the Calendar Quarter to 2022 Q1 on the Overview Dashboard.

The screenshot shows the Oracle Business Intelligence Procurement dashboard. At the top, there are navigation tabs for 'Overview' and 'Supplier Performance'. A filter bar is highlighted with a red box, containing the following settings: 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 filter bar, there are two main data sections: '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 Al	\$360,510.87	13.09%
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	MMI VETERINARY SUPPLY CO	\$405,191.09
2	0000004888	PATERSON VETERINARY SUPPLY INC	\$390,899.93
3	0000005149	LAWCOR LLC	\$319,887.71
4	0000002963	JESUS MARTINEZ	\$291,408.78
5	0000008613	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	\$57,612.00
10	0000006311	AGNI ENTERPRISES LLC	\$46,679.60

Lesson 3: Personalization and Finding Help

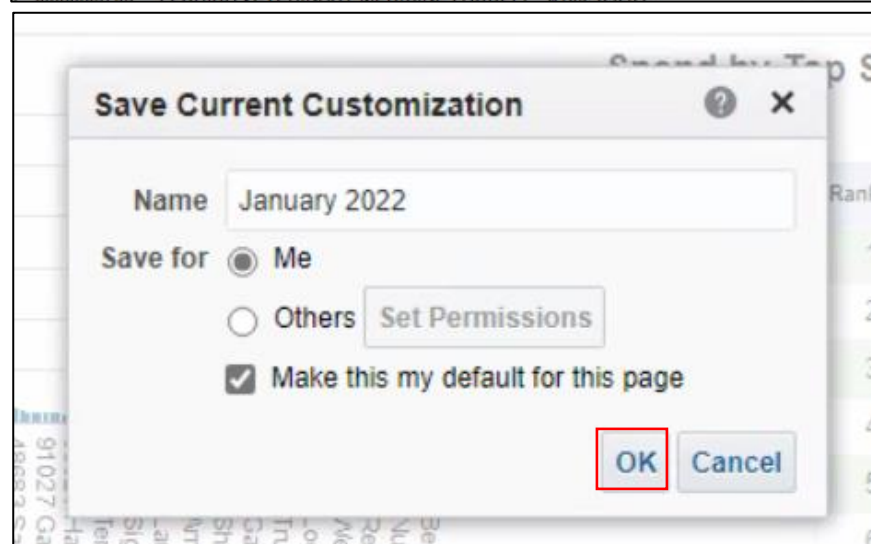
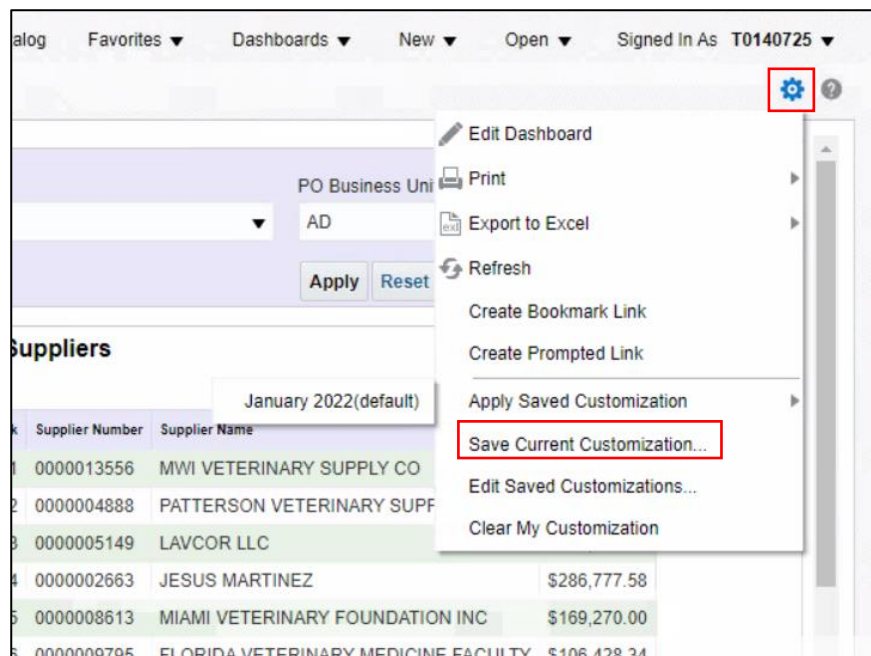
Lecture 1: Personalization

To personalize a Dashboard page:

- Navigate to the Dashboard page to personalize and input desired prompts.
- Select the **Page Options** icon in the upper right corner of the Dashboard.
- Select the **Save Current Customization** list item to save the prompt values within a certain Dashboard.
- Name the page.

Employees can check the **Make this my default for this page** checkbox option to have the customizations automatically in place when navigating to the personalized Dashboard.

Note: Employees must select **OK** to apply any changes made to the dashboard page.



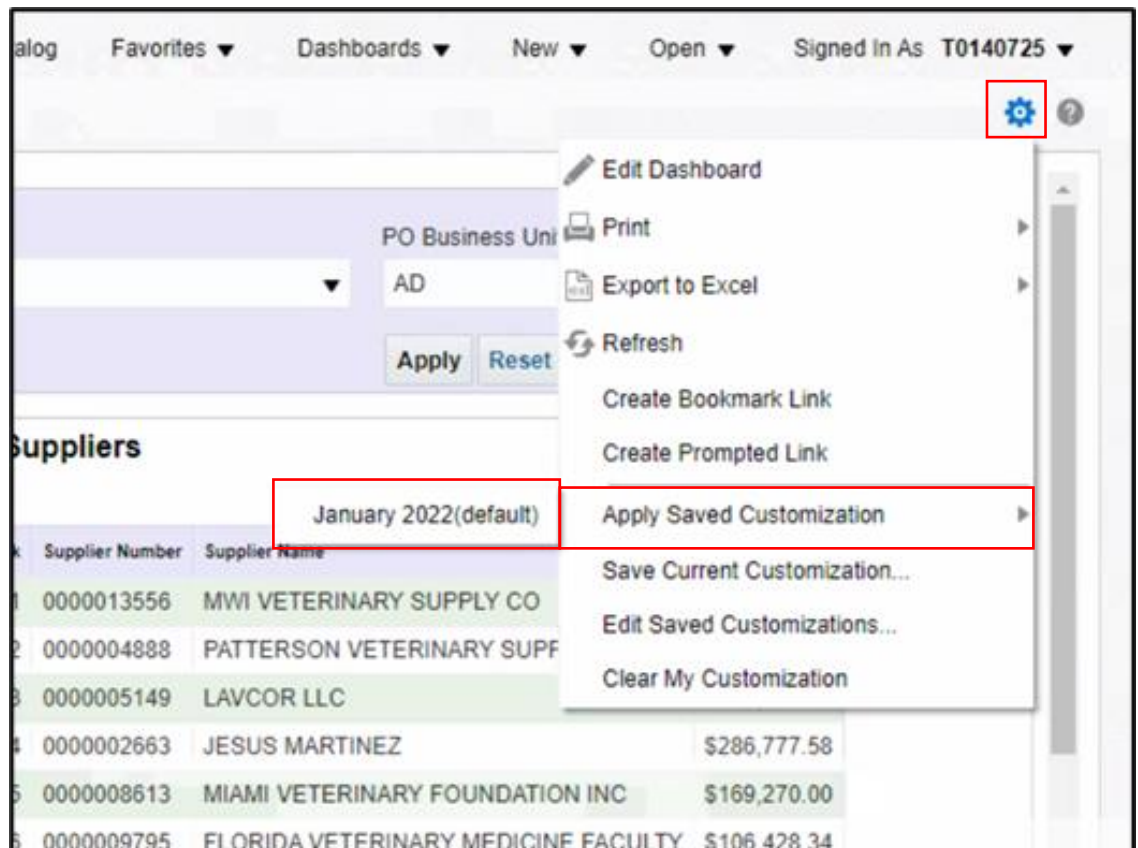
Lesson 3: Personalization and Finding Help

Lecture 1: Personalization

Users can create multiple Saved Customizations with different prompt values. For example, with multiple Departments, it is possible to save multiple Dashboard pages, each with a different Department prompted.

To apply another saved Dashboard, select another Department and Select on the **Apply Saved Customization** menu item.

The **Apply Saved Customization** functionality uses a previously saved customization on the current Dashboard page. In the example below, there is the January 2022 Saved Dashboard option.



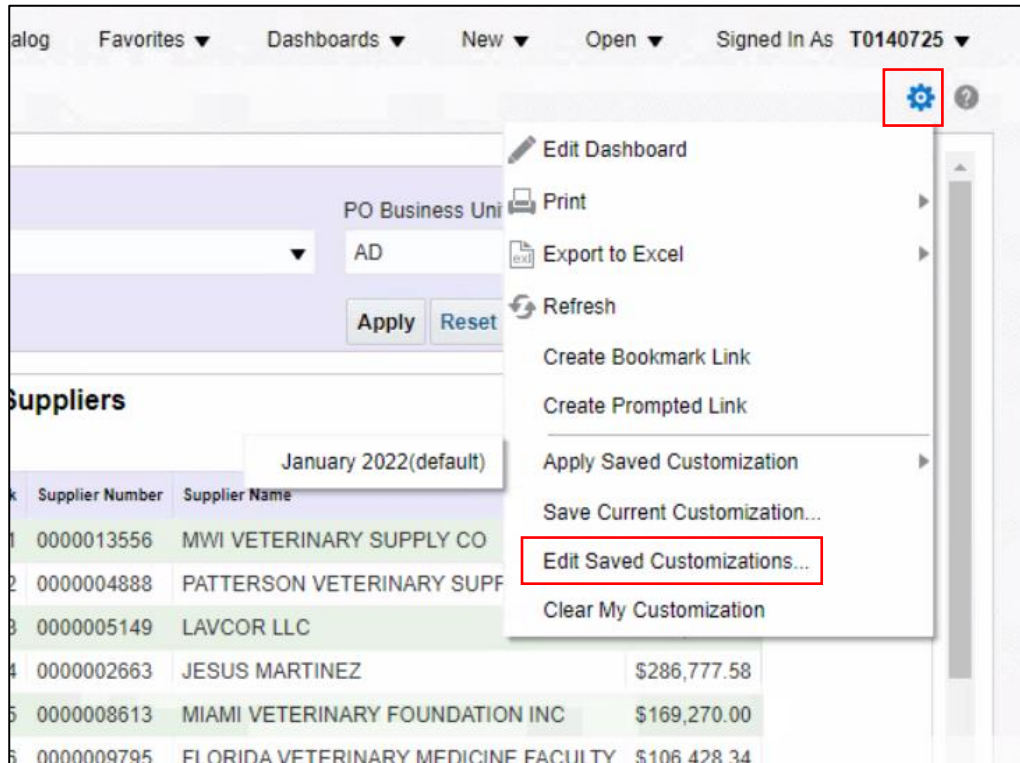
The screenshot shows the Informis BI dashboard interface. At the top, there are navigation tabs: 'Catalog', 'Favorites', 'Dashboards', 'New', and 'Open'. The user is signed in as 'T0140725'. A settings gear icon is highlighted with a red box. A dropdown menu is open, showing options: 'Edit Dashboard', 'Print', 'Export to Excel', 'Refresh', 'Create Bookmark Link', 'Create Prompted Link', 'Apply Saved Customization' (highlighted with a red box), 'Save Current Customization...', 'Edit Saved Customizations...', and 'Clear My Customization'. Below the menu, a table titled 'Suppliers' is visible. The table has columns for 'Supplier Number', 'Supplier Name', and a monetary value. The first row is highlighted in blue and has 'January 2022(default)' selected in a dropdown menu, also highlighted with a red box. The table data is as follows:

Supplier Number	Supplier Name	
0000013556	MWI VETERINARY SUPPLY CO	
0000004888	PATTERSON VETERINARY SUPP	
0000005149	LAVCOR LLC	
0000002663	JESUS MARTINEZ	\$286,777.58
0000008613	MIAMI VETERINARY FOUNDATION INC	\$169,270.00
0000009795	FLORIDA VETERINARY MEDICINE FACULTY	\$106,428.34

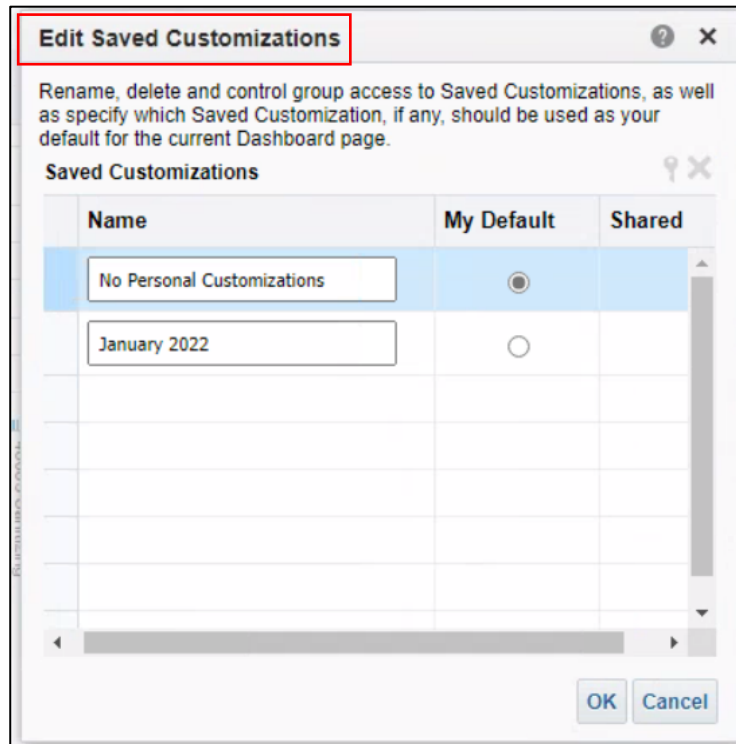
Lesson 3: Personalization and Finding Help

Lecture 1: Personalization

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



Edit Saved Customizations allows renaming and editing Saved Customizations. It also allows a Page Default selection.

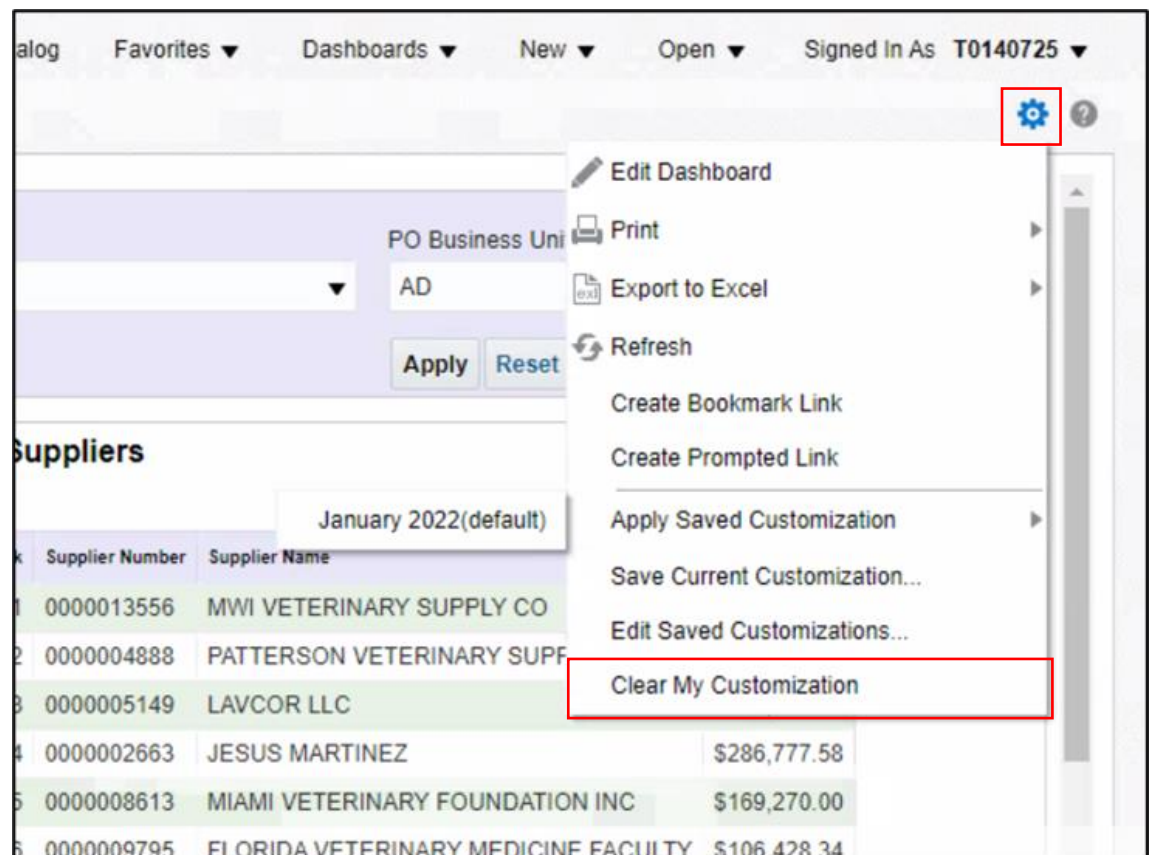


Lesson 3: Personalization and Finding Help

Lecture 1: Personalization

To clear customizations and view the INFORMS BI default Dashboard page, use the **Clear My Customization** menu item to reset the current Dashboard back to its default state.

Note: The updates made by each employee does not impact others view. Once an employee selects another report or exist the report, the view is updated to its default.

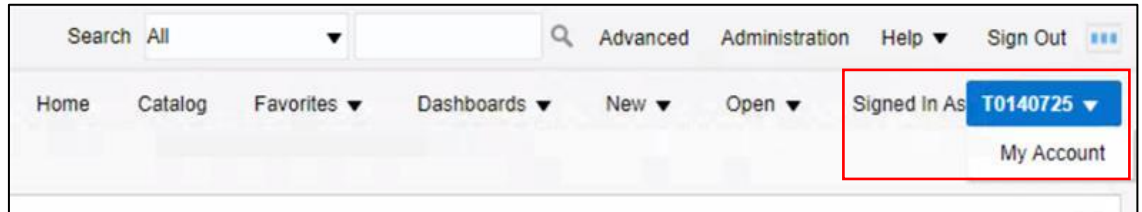


Lesson 3: Personalization and Finding Help

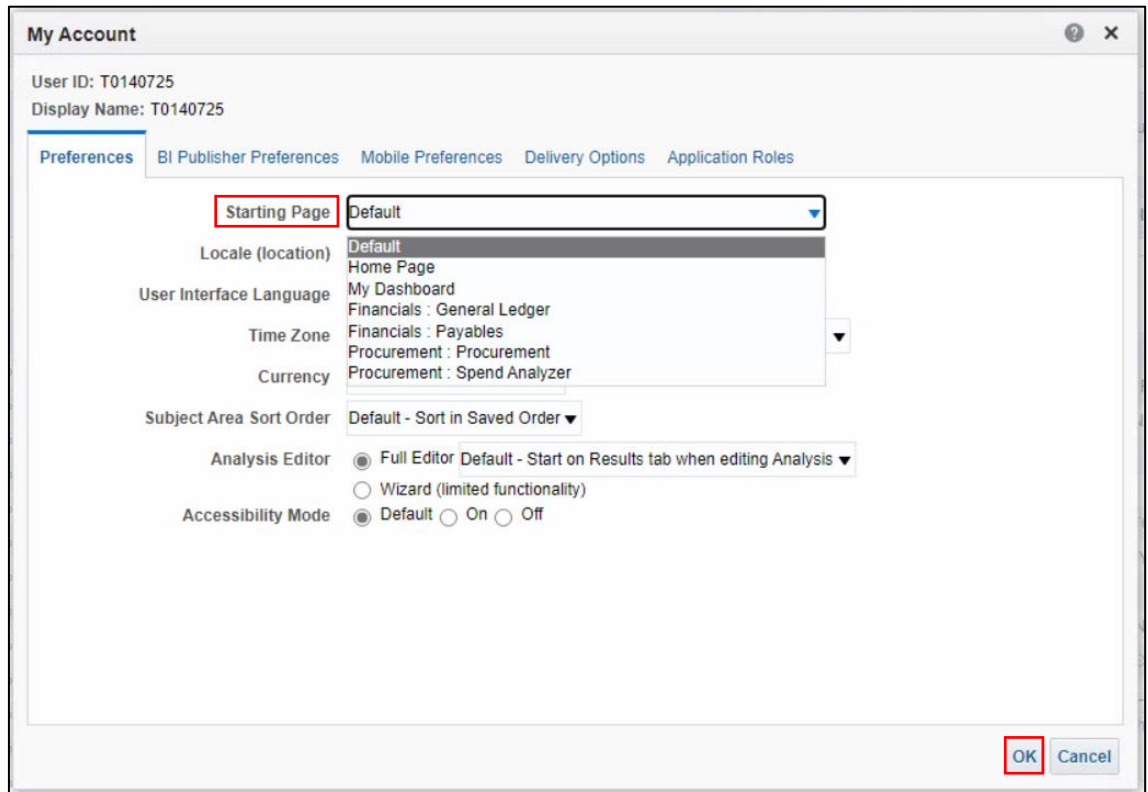
Lecture 1: Personalization

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 the User Name (i.e., your eKey) to the right of **Signed In As** in the upper right corner, then Select on the **My Account** link.



2. Select the preferred Dashboard Page from the drop-down list entitled **Starting Page** and Select **OK**.



Lesson 3: Personalization and Finding Help

Lecture 2: Finding Help

When working with INFORMS BI, keep in mind these helpful hints:

The 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*

Issues can often be fixed by simply selecting the **Refresh** button on the browser.

Lesson 3: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario

- **Procurement:** Employees will update prompt defaults and personalize your home screen view.
- **Financials:** Employees will update customization in the AP balances and set home screen view.

Instructions

This activity will be performed individually; you must complete it using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors to assist if you have questions.

Lesson 3: Training Exercise

Debrief



1. Using Customization settings allows you to save and pre-populate your preferred prompt values in Reports / Dashboards.
 - A. True
 - B. False
2. If a report displays “No results” after you input your prompt values, the best option is to:
 - A. Change the prompt values to include a smaller range of data
 - B. Change the prompt values to include a larger range of data
 - C. Clear all prompt values
 - D. Navigate to a different report

Lesson 3: Lesson Summary

Objectives Achieved



Now that you have completed the Personalization and Finding Help lesson, you should be able to:

- 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.

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the course. You now should be able to:

- Understand the purpose of INFORMS
- 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

Next Steps

Now that you have completed the course, please make sure to complete the following tasks:

- Course assessment (tests your knowledge of the content)
- Course evaluation (collects course feedback)
- Log off your workstation

Reference Materials

Reference Materials



If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits:

- 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

For additional information:

- www.miamidade.gov/informs

Glossary

Key Terms

The following key terms are used in this course:



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.
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.
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.
Hierarchical column	A column that can expand (or drill down) into more specific information for a certain number of pre-established levels.
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.

Glossary

Key Terms

The following key terms are used in this course:



Term	Definition
OBIA (Oracle Business Intelligence Applications)	The technology behind the INFORMS BI Solution.
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.
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.
Report	An analysis displayed as a table or graphic based on a data set.
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.