
INFORMS BI Training Guide

Course Code: BI 022

Course: HCM Reporting Capabilities (View Only)

Course Overview

Course Description

This course provides a comprehensive review of the Central HR, Recruitment, and Time and Labor-User processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: INFORMS BI Processes
- Module 3: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related INFORMS access:

- Time and Labor User
- Recruitment User
- Central HR User

Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of ERP
- ERP 102 – INFORMS Navigation, Reporting, and Online Help

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 4 hours.

Table of Contents

Content	Page
Module 1: Course Introduction	4
Module 2: INFORMS BI Process	13
Lesson 1: INFORMS Business Intelligence Basics	14
Lesson 2: Dashboards and Reports	25
Module 3: Course Summary	49

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:

- Use the Global Header
- Understand the functionality of a dashboard and a report
- Understand prompts and use prompt capabilities to filter report data
- Understand 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 export options

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

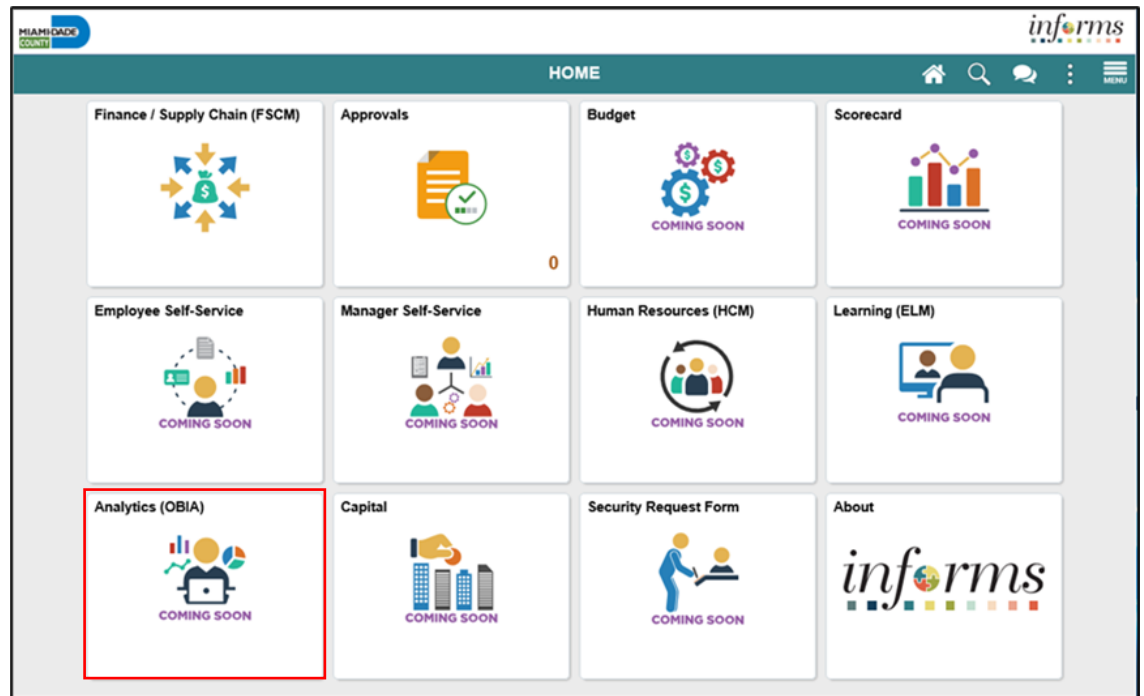
- **Time and Labor User:** The Time and Labor User is responsible for reviewing Time and Labor dashboard reports.
- **Recruitment User:** The Recruitment User is responsible for reviewing Recruitment dashboard reports.
- **Central HR User:** The Central HR User is responsible for reviewing Human Resources dashboard reports for all BU's.

Module 1: Course Introduction

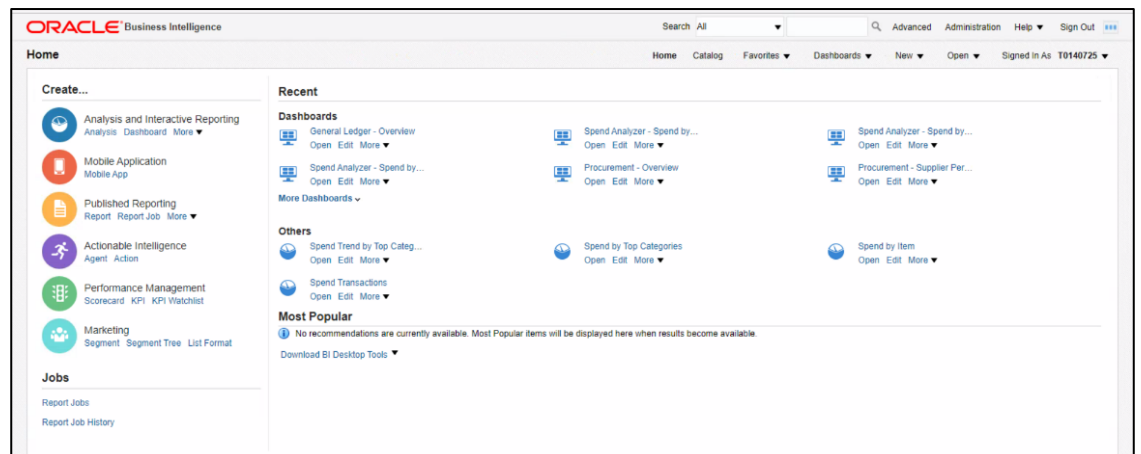
Navigation

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 Recruitment and Time & Labor 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.

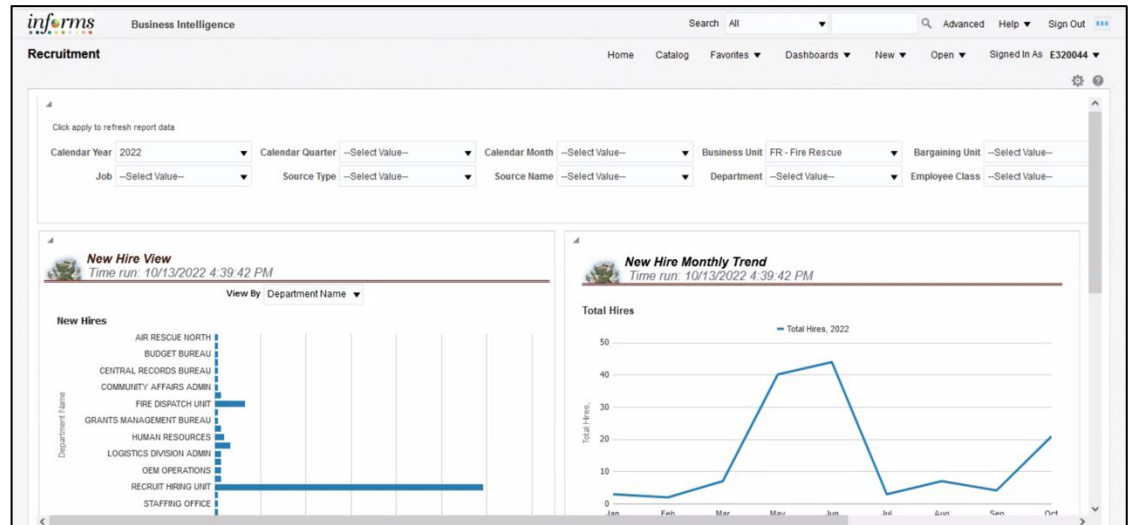


Module 1: Course Introduction

Navigation:
Financials

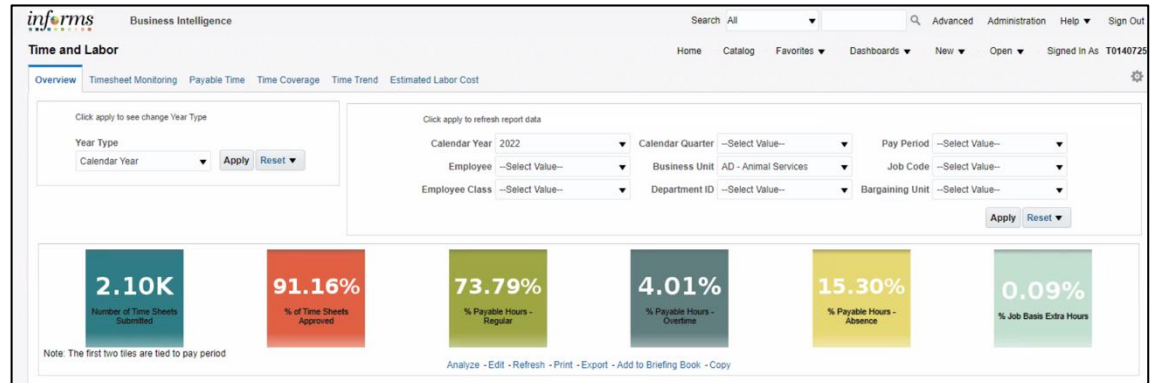
The **Recruitment** Dashboard contains the following tabs:

- Overview



The **Time and Labor** Dashboard contains the following tabs:

- Overview
- Timesheet Monitoring
- Time Coverage
- Time Trend
- Estimated Labor Cost



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

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 (Recruitment and Time & Labor).
- 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.

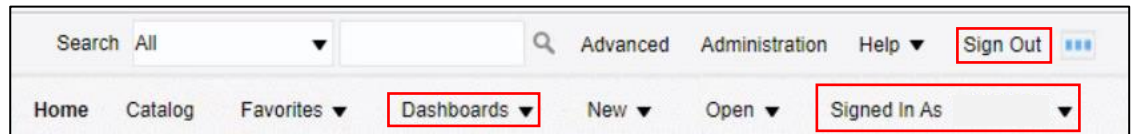
Note: INFORMS BI will grow and expand to include more reports and subject areas. Continue to look for communications about future expansions.

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

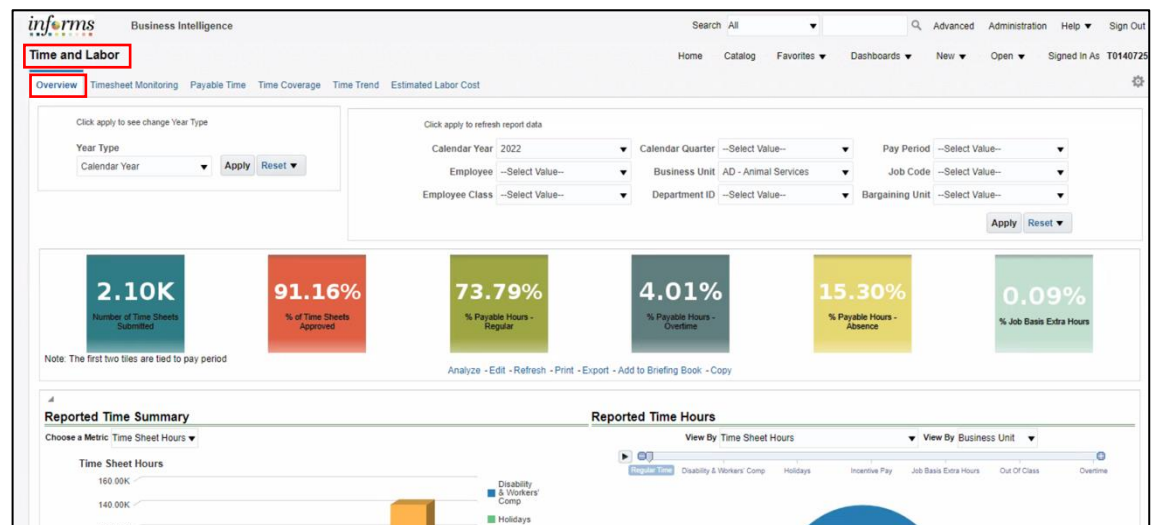
Lecture 2: Dashboard and Report Overview

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

A **Dashboard** is a structure that organizes analytical content (e.g., Time and Labor and Recruitment). The content on a **Dashboard Page** (e.g., reports, links, visualizations) is usually displayed as one or more reports.

In the below example, the **Time and Labor Dashboard** is displayed with the **Overview Dashboard Page** (tab) selected.

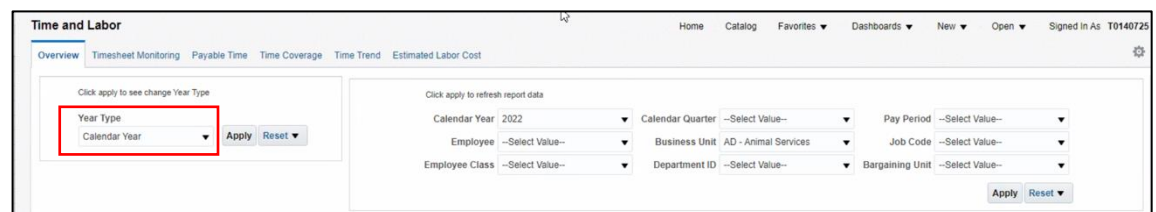
Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Human Capital Management > Time and Labor**



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. Employees have the option to view reports according to **Year Type**, Calendar Year or Fiscal Year.



Lesson 1: INFORMS BI Basics

Lecture 2:
Dashboard and
Report
Overview

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.

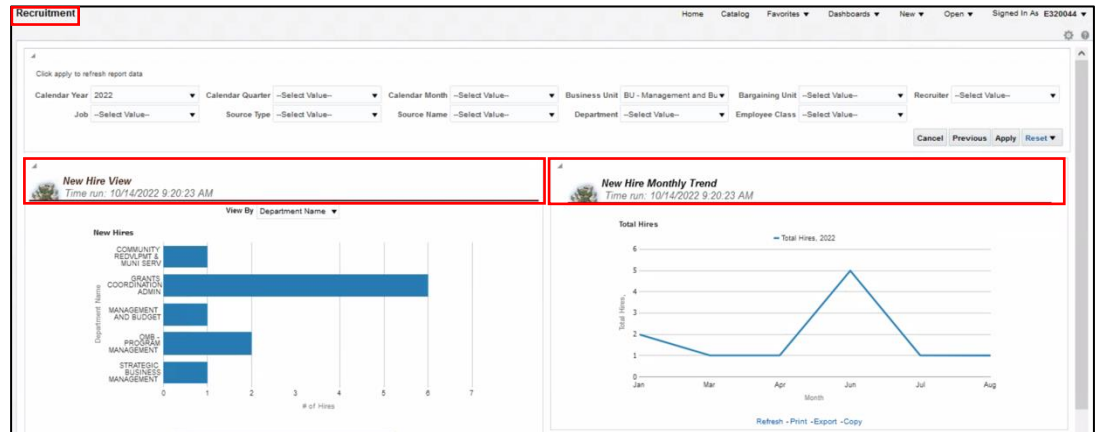
Lesson 1: INFORMS BI Basics

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:

- **New Hire View**
- **New Hire Monthly Trend**



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

Analyze - Refresh

Lesson 1: Training Activity 1

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

Scenario

- **Recruitment:** Employee will view New Hire Monthly Trend for a specific business unit.
- **Time and Labor:** Employee will view Reported Time Trend.

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 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
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.
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.
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.
Slider	This is an interactive selector at the top of certain graph views. It allows the user to select the data which will be displayed in the graph. Users can click, or click and drag to move between the different options.
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

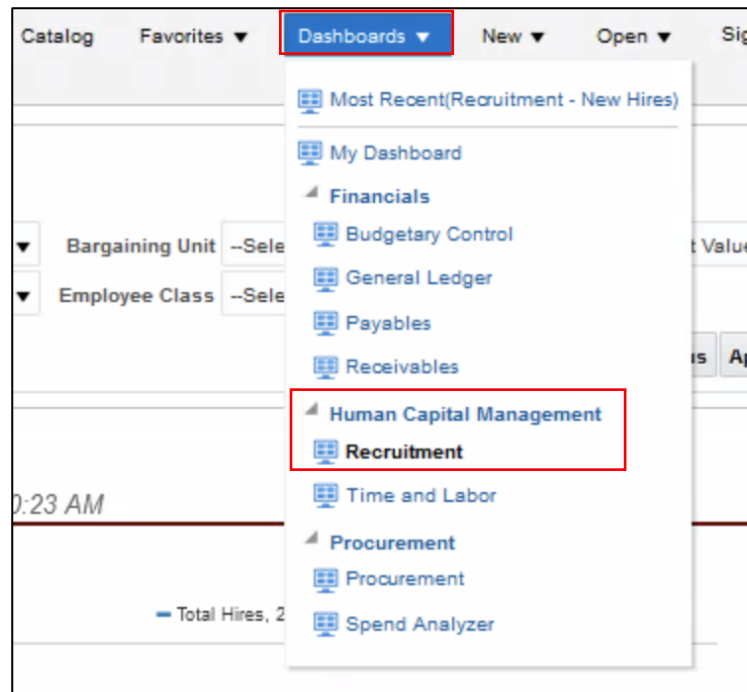
Lesson 2: Introduction

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., Recruitment and Time and Labor).

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

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



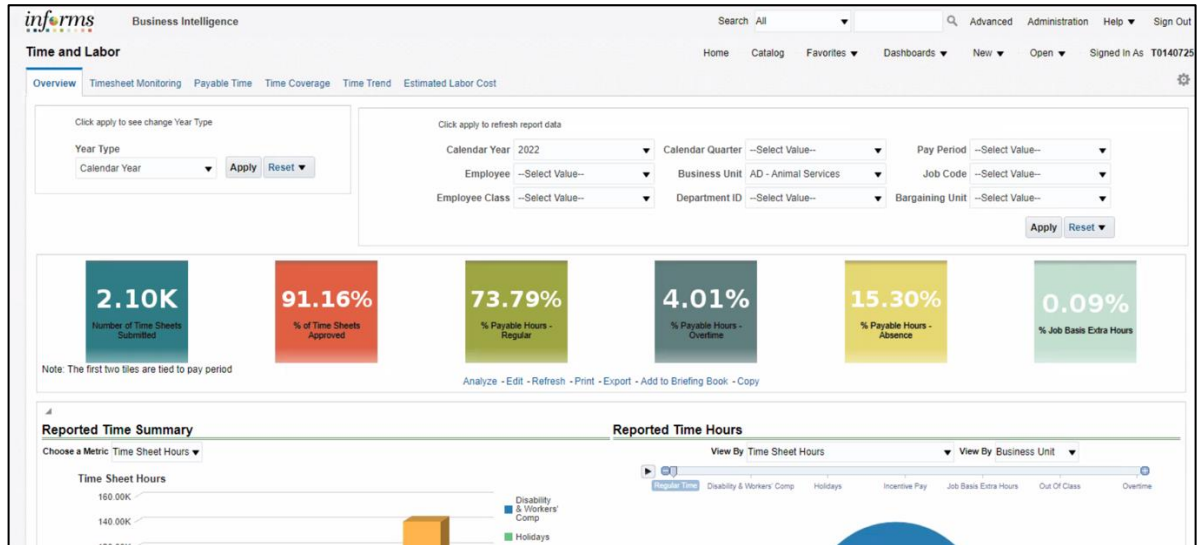
Lesson 2: Dashboards and Reports

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 **Time and Labor** 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 > Human Capital Management > Time and Labor:**



After a Dashboard is selected, the dashboard select automatically opens the Overview Tab. Employees can navigate to the other subject areas within the **Time and Labor** Dashboard. The other subject areas are: **Timesheet Monitoring, Time Coverage, Time Trend** and **Estimated Labor Cost.**

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

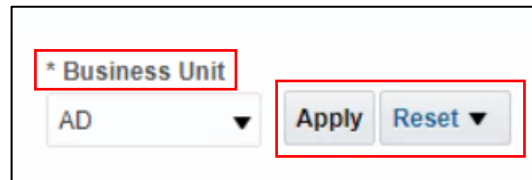
An asterisk (*) indicates that the prompt is a required field, and a selection must be made.

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



* Business Unit
AD ▼ Apply Reset ▼



Apply Reset ▼

Reset to last applied values

Reset to default values

Clear All

n this rep


2022 Q 4

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 user interface for a dashboard or report. At the top, there are two dropdown menus: "Calendar Year" with "--Select Value--" and "Employee Class" with "--Select Value--". Below these is a list of employee names, each preceded by a checkbox and a unique ID. The list includes:

- 00000011 - Vogel, Tobie N
- 00000022 - Silver, Khadeem F
- 00000028 - Derrick, Delois V
- 00000034 - Mokinley, Lang H
- 00000050 - High, Lorri K
- 00000092 - McNulty, Genevive F

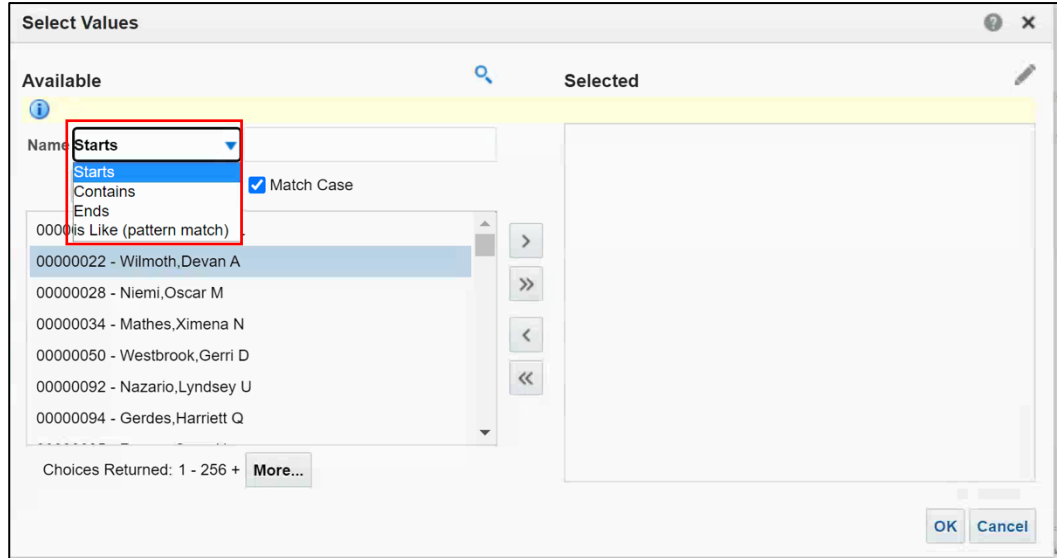
At the bottom of the list, there is a button labeled "More/Search..." which is highlighted with a red rectangular box. The list also has a vertical scrollbar on the right side.

Lesson 2: Dashboards and Reports

Lecture 1: Dashboards

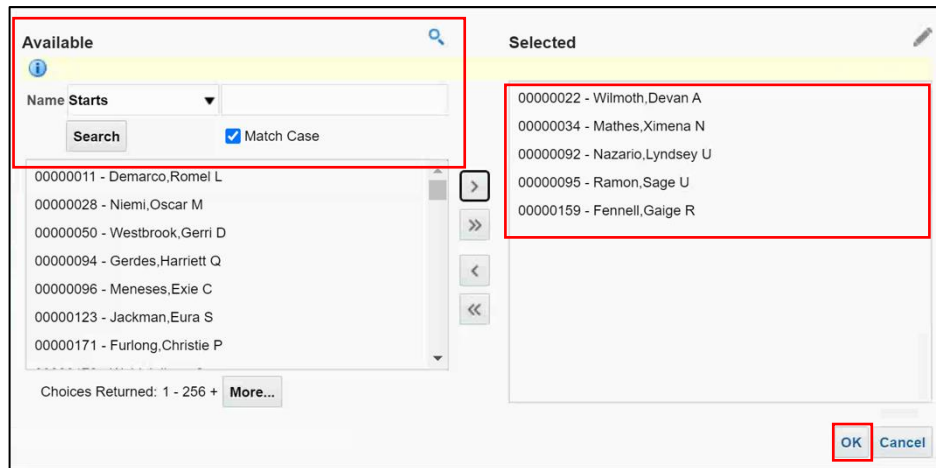
Once the **Search** button has been selected, the **Select Values** window shown below displays.

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 **Calendar Year** is used as a constrained prompt, the **Calendar Quarter** and **Pay Period** prompt only shows Calendar Quarter and Pay Period for that Calendar Year. 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 Recruitment and Time and Labor:

- Recruitment Example:
 - **Fiscal Year**
 - **Calendar Year**
 - **Calendar Quarter**
 - **Fiscal Quarter**
 - **Pay Period**
 - **Etc.**
- Time and Labor Example:
 - **Fiscal Year**
 - **Calendar Year**
 - **Calendar Quarter**
 - **Fiscal Quarter**
 - **Pay Period**
 - **Etc.**

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 table:

- **Table**

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

Table

Reported and Processed Time Details																
Year Name	Quarter Name	Month Name	Time Sheet Period Name	Employee Number	Employee Name	Supervisor Name	Position Name	Employee Class Name	Department Number	Department Name	Location Name	Time Entry Subcategory Name	Time Entry Name	Time Entry Code	Time Sheet Hours	Payable Hours
2022	2022 Q 3	2022 / 09	05-SEP-22 - 18-SEP-22	00006259	Plank,Jermaine R	Olay Tomas	Ast Dir Omb	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	REG	REG	21.00	21.00
				00013451	Looney,Vania J	Lavenir Shoop	SENIOR BUSINESS ANALYST	Exempt	BU04010000	BOND PROGRAM MONITORING	111 NW 1ST ST	Regular Time	REG	REG	52.00	52.00
				00013570	Luck,Itzayana G	Thao Lasalle	PROGRAM COORDINATOR OMB	Exempt	BU05010000	MPPA	111 NW 1ST ST	Regular Time	REG	REG	56.00	56.00
				00015898	Edmonds,Telma D	Harmony Frederick	ACCOUNTANT 1	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	61.00	61.00
				00019796	Fonseca,Treasa Z	Kimberley Seger	CONTRACTS OFFICER	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	56.00	56.00
				00024134	Mcnamara,Juandrea V	Ahmad Frazier	SPEC PROJECTS ADMINISTRATOR 1	Exempt	BU06030000	OGC FED GRANTS ADMIN	111 NW 1ST ST	Regular Time	REG	REG	3.50	3.50
				00026873	Weinstein,Doreatha X	Lavenir Shoop	OMB COORDINATOR	Exempt	BU02010000	MANAGEMENT AND BUDGET	111 NW 1ST ST	Regular Time	REG	REG	48.00	48.00
				00027177	Moncrief,Bassem Y	Dayna Densmore	ERP BUSINESS ANALYST 2	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	63.00	63.00
				00032324	Guzman,Leif C	Harmony Frederick	ACCOUNTANT 2	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	56.00	56.00
				00032564	Falcon,Russell V	Elta Luster	SPC PROJECTS ADMINISTRATOR 1	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	64.00	64.00

Lesson 2: Dashboards and Reports

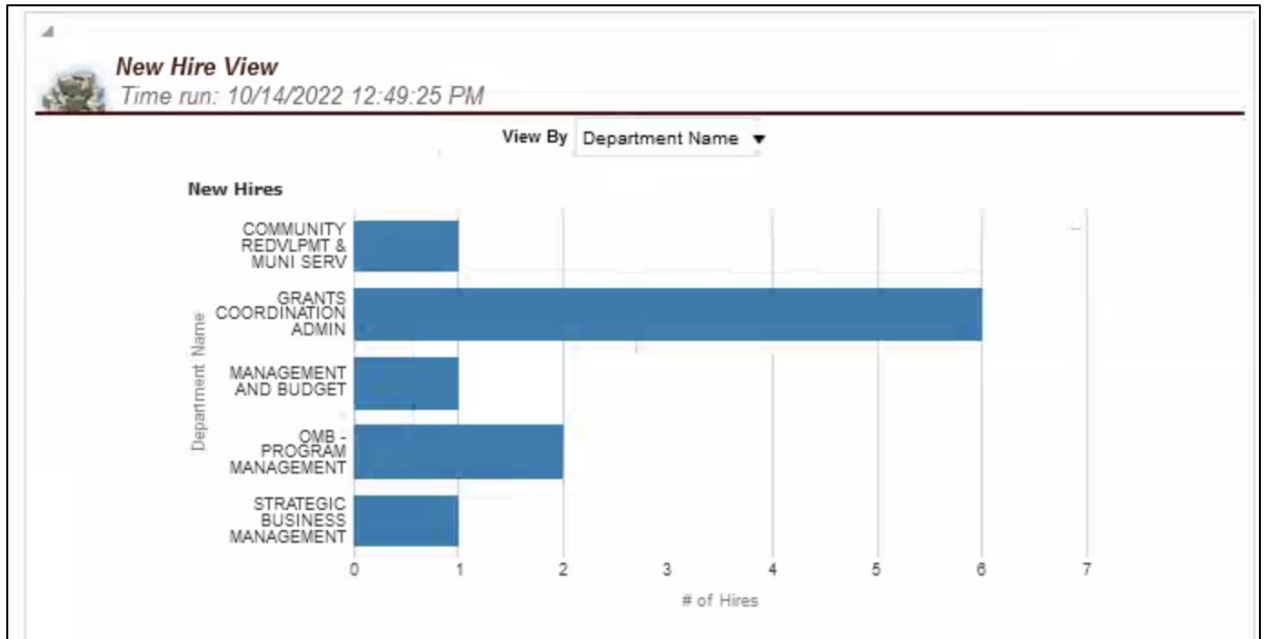
Lecture
2:
Reports

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., New Hires by Department Name).

Graph



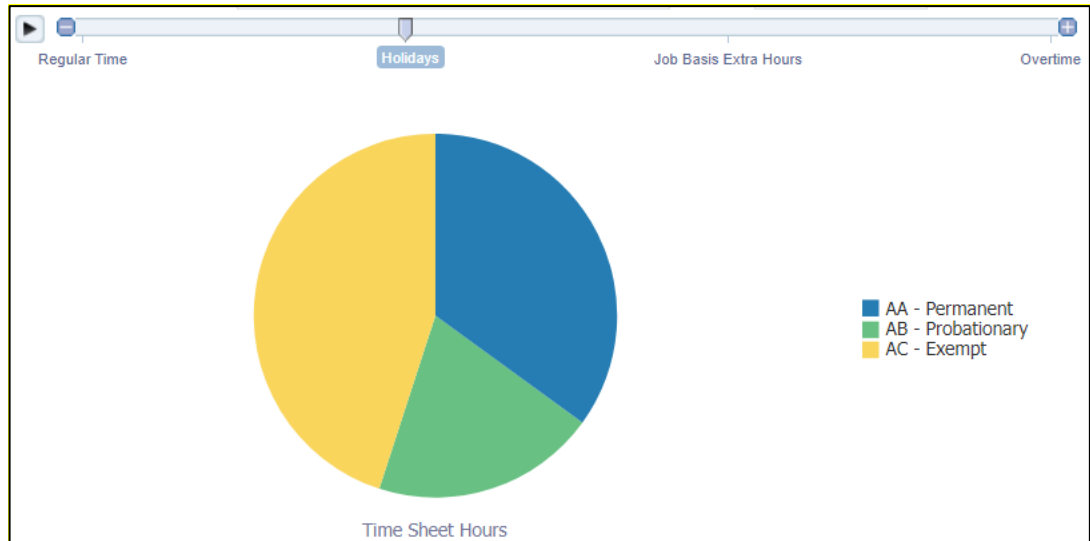
Lesson 2: Dashboards and Reports

Lecture 2:
Reports

Slider

This is an interactive selector at the top of certain graph views. It allows the user to select the data which will be displayed in the graph. Users can click, or click and drag to move between the different options.

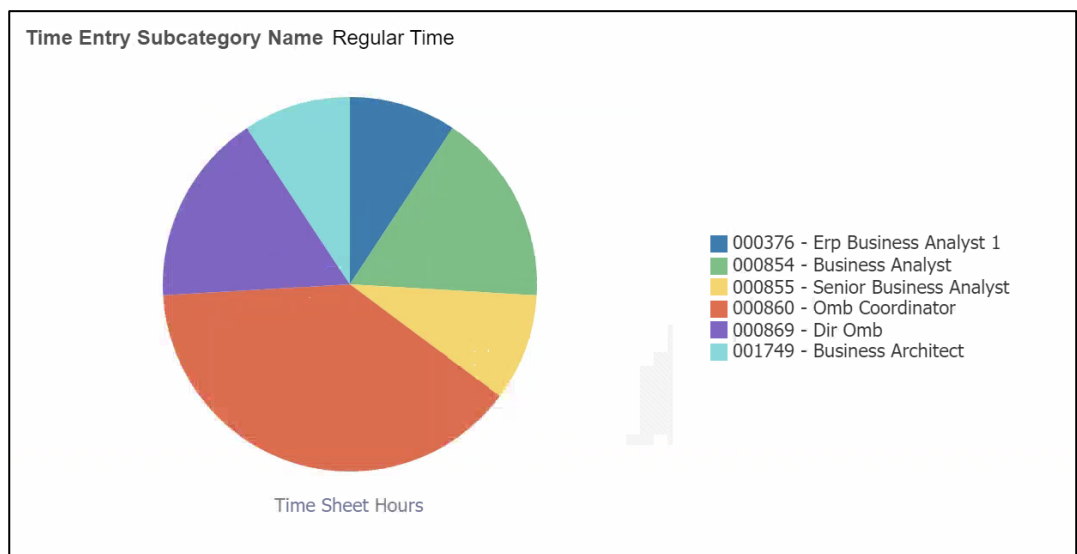
Slider



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

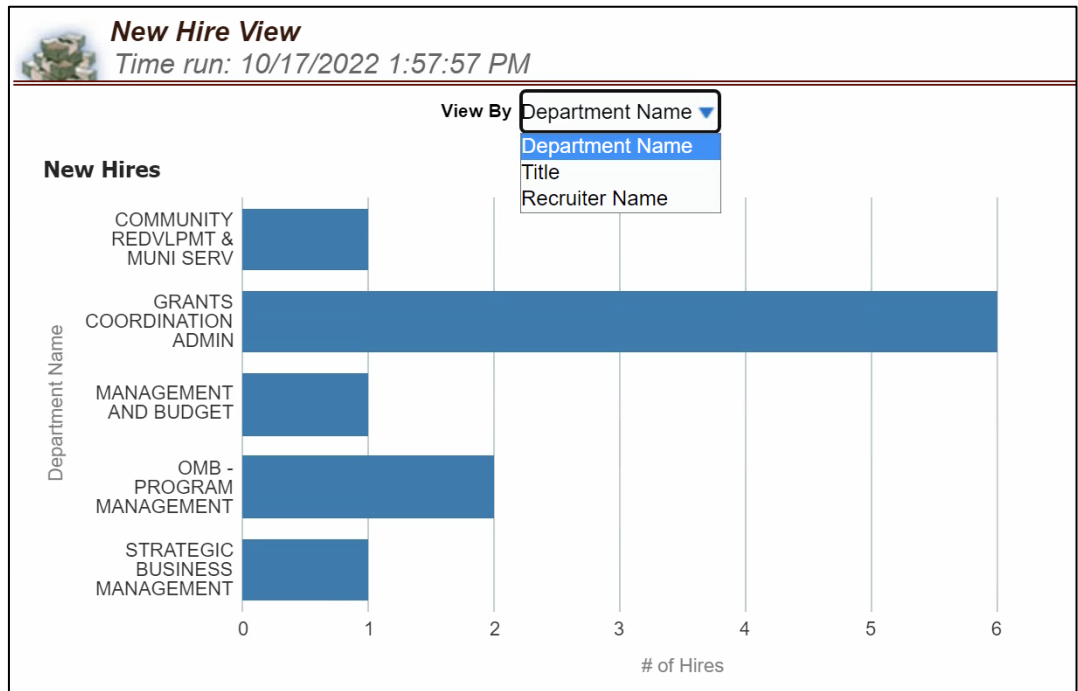
INFORMS BI have different types of view when analyzing a report. In the next report visualizations, we will see the different views available employees can select from to narrow down their results.

Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Human Capital Management > Recruitment > New Hire View**

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:

- **Department Name**
- **Title**
- **Recruiter Name**



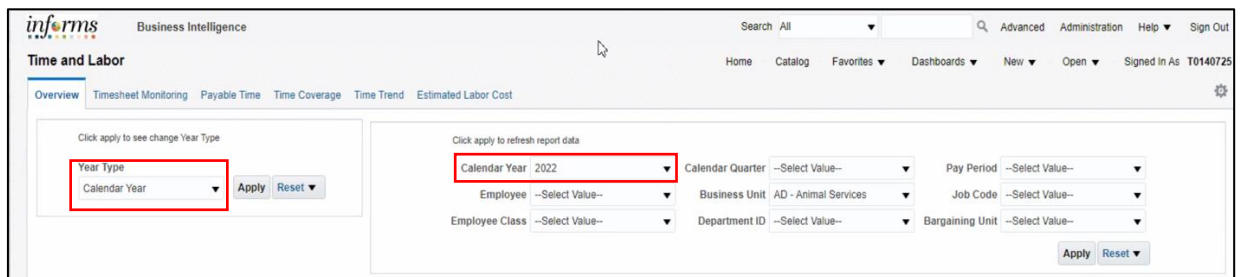
Lesson 2: Dashboards and Reports

Lecture 2: Reports

Year Type: a drop-down list containing Year Type values. Select **Year Type** prompt and select **Apply** to see additional prompt values.

In the example below, the **Year Type** list provides the option to select and view **Calendar Year** or **Fiscal Year** in the analysis.

Navigate to **INFORMS > Analytics (OBIA) > Dashboards > Human Capital Management > Time and Labor**



The screenshot displays the Informatics Business Intelligence interface for the 'Time and Labor' dashboard. The interface includes a search bar at the top right and navigation tabs for 'Overview', 'Timesheet Monitoring', 'Payable Time', 'Time Coverage', 'Time Trend', and 'Estimated Labor Cost'. The main content area features two filter sections. The left section, titled 'Click apply to see change Year Type', contains a 'Year Type' dropdown menu with 'Calendar Year' selected, and 'Apply' and 'Reset' buttons. The right section, titled 'Click apply to refresh report data', contains several dropdown menus: 'Calendar Year' (2022), 'Employee' (--Select Value--), 'Employee Class' (--Select Value--), 'Calendar Quarter' (--Select Value--), 'Business Unit' (AD - Animal Services), 'Department ID' (--Select Value--), 'Pay Period' (--Select Value--), 'Job Code' (--Select Value--), and 'Bargaining Unit' (--Select Value--). 'Apply' and 'Reset' buttons are located at the bottom right of this section.

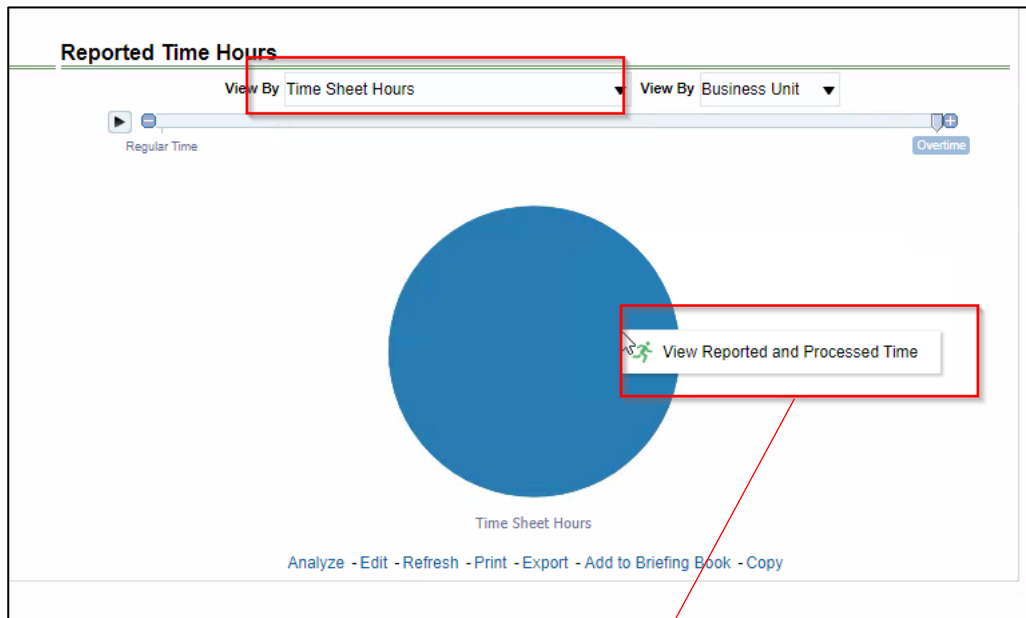
Lesson 2: Dashboards and Reports

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. If guided navigation is available within a report, an action link will become available when the visualization is clicked on.

When selecting on the hyperlinked data, a button appears with the navigation area (e.g., View Reported and Processed Time). Selecting this button allows the information from that visualization to be passed to the next Dashboard or Report.



Reported and Processed Time Details

Year Name	Quarter Name	Month Name	Time Sheet Period Name	Employee Number	Employee Name	Supervisor Name	Position Name	Employee Class Name	Department Number	Department Name	Location Name	Time Entry Subcategory Name	Time Entry Name	Time Entry Code	Time Sheet Hours	Payable Hours
2022	2022 Q 4	2022 / 10	17-OCT-22 - 30-OCT-22	00019796	Fonseca,Treasa Z	Kimberley Seger	CONTRACTS OFFICER	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	80.00	
				00024134	Mcnamara,Juandrea V	Ahmad Frazier	SPEC PROJECTS ADMINISTRATOR 1	Exempt	BU06030000	OGC FED GRANTS ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	32.00	
				00027177	Moncrief,Bassem Y	Dayna Densmore	ERP BUSINESS ANALYST 2	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	72.00	
				00037235	Robin,Reece M	Mae Desilva	DIR OMB	Exempt	BU01010000	OFFICE OF THE DIRECTOR	111 NW 1ST ST	Regular Time	REG	REG	56.00	
													WH	WRKHM	16.00	

Lesson 2: Dashboards and Reports

Lecture 2: Reports

The columns in 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

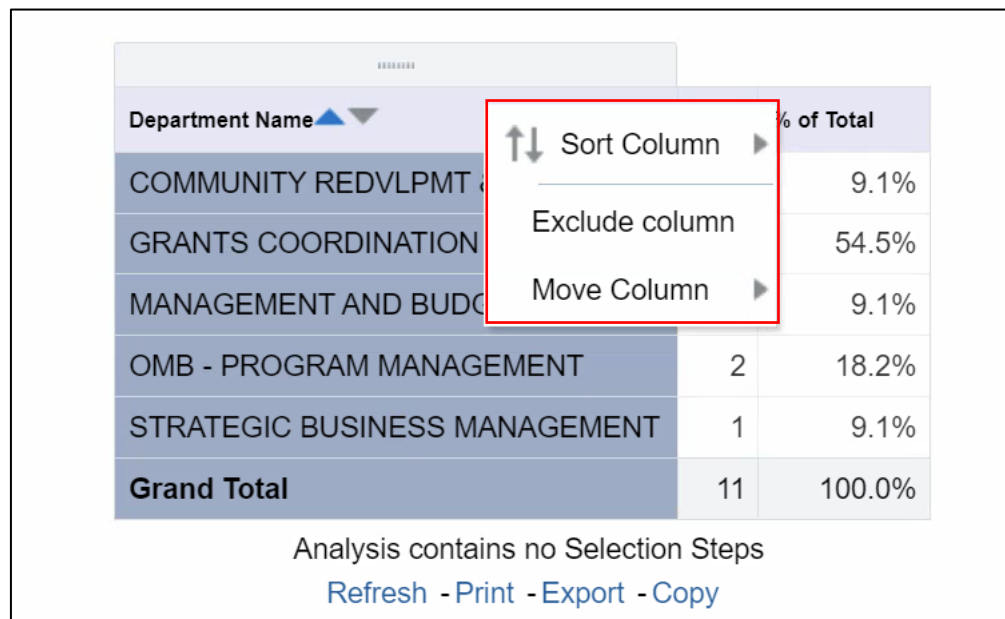
Lists the columns available to add into the table. Including a column will break out the table values based on this column.

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.



Department Name		% of Total
COMMUNITY REDVLPMT		9.1%
GRANTS COORDINATION		54.5%
MANAGEMENT AND BUDG		9.1%
OMB - PROGRAM MANAGEMENT	2	18.2%
STRATEGIC BUSINESS MANAGEMENT	1	9.1%
Grand Total	11	100.0%

Analysis contains no Selection Steps
[Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

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 **Reported and Processed Time Details** by the **Time and Labor Overview**. The breadcrumbs are highlighted.

Reported and Processed Time Details																
Year Name	Quarter Name	Month Name	Time Sheet Period Name	Employee Number	Employee Name	Supervisor Name	Position Name	Employee Class Name	Department Number	Department Name	Location Name	Time Entry Subcategory Name	Time Entry Name	Time Entry Code	Time Sheet Hours	Payable Hours
2022	2022 Q 3	2022 / 09	05-SEP-22 - 18-SEP-22	00323923	Posey,Doloris G	Zafar Morley	ERP BUSINESS ANALYST 1	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	72.00	72.00
				00326326	Longoria,Lyndsay X	Zafar Morley	ERP BUSINESS ANALYST 1	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	48.00	48.00
Grand Total															120.00	120.00

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

Time and Labor Overview > Reported and Processed Time Details

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 **Reported and Processed Time Details** report.

Reported and Processed Time Details																	
Year Name	Quarter Name	Month Name	Time Sheet Period Name	Employee Number	Employee Name	Supervisor Name	Position Name	Employee Class Name	Department Number	Department Name	Location Name	Time Entry Subcategory Name	Time Entry Name	Time Entry Code	Time Sheet Hours	Payable Hours	
2022	2022 Q 3	2022 / 09	05-SEP-22 - 18-SEP-22	00323923	Posey,Dolores G	Zafar Morley	ERP BUSINESS ANALYST 1	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	72.00	72.00	
				00328328	Longoria,Lyndsay X	Zafar Morley	ERP BUSINESS ANALYST 1	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	WH	WRKHM	48.00	48.00	
Grand Total															120.00	120.00	
Return Analyze Edit Refresh Print Export Create Bookmark Link Copy																	

Lesson 2: Dashboards and Reports

Lecture 2: Reports

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

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

    Rows 1 - 25

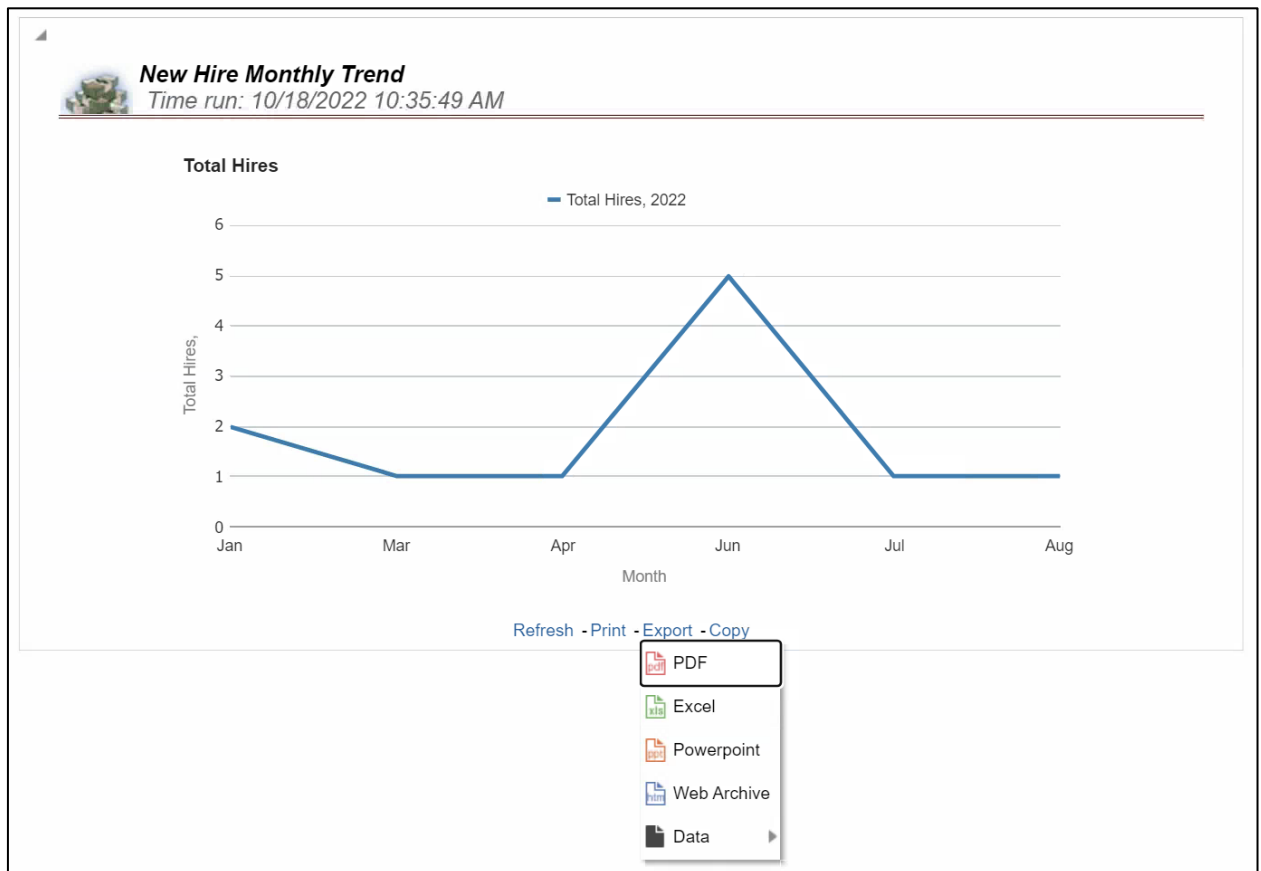
Lesson 2: Dashboards and Reports

Lecture 2: Reports

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

- 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.



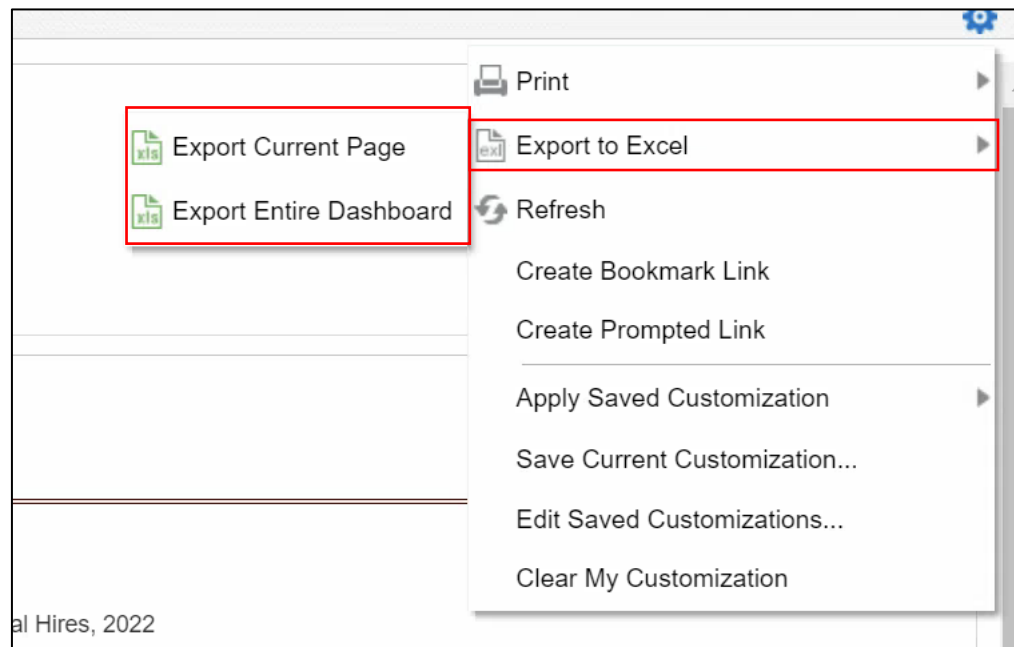
Lesson 2: Dashboards and Reports

Lecture 2: Reports

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

1. 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

- **Recruitment:** Employee will view New Hires by Department and Title.
- **Time and Labor:** Employee will view drill-downs on time trends.

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 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.

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*
- 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.

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 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 export options

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

- Use Search within Prompts
- Export a Report

Glossary

Key Terms

The following key terms are used in this course:



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.
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.
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.
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.
Slider	This is an interactive selector at the top of certain graph views. It allows the user to select the data which will be displayed in the graph. Users can click, or click and drag to move between the different options.
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.