

Course ID: BI 022

Course: HCM Reporting Capabilities (View Only)

Ground Rules



Be on time



Attendance



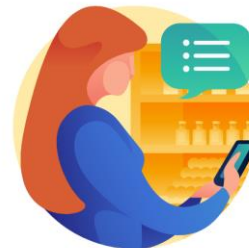
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

Course Overview

Course Description

This course provides a comprehensive review of INFORMS Business Intelligence.

This course consists of the following modules:

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

Course Overview, Continued

Training Audiences	<ul style="list-style-type: none">• Central HR User• Recruitment User• Time and Labor User
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help
Other related Courses	<ul style="list-style-type: none">• N/A
Estimated Duration	<ul style="list-style-type: none">• 4 Hours

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of Analytics

Introduction to Demonstrations, Activities, and Exercises

Course Administration and Logistics



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



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



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

Learning Objectives

- Understand the purpose of INFORMS Business Intelligence
- Use the Global Header
- Understand the functionality of a dashboard and a report
- Understand prompts and use prompt capabilities to filter report data
- Understand 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

Roles and Responsibilities

The roles and responsibilities associated with INFORMS BI:

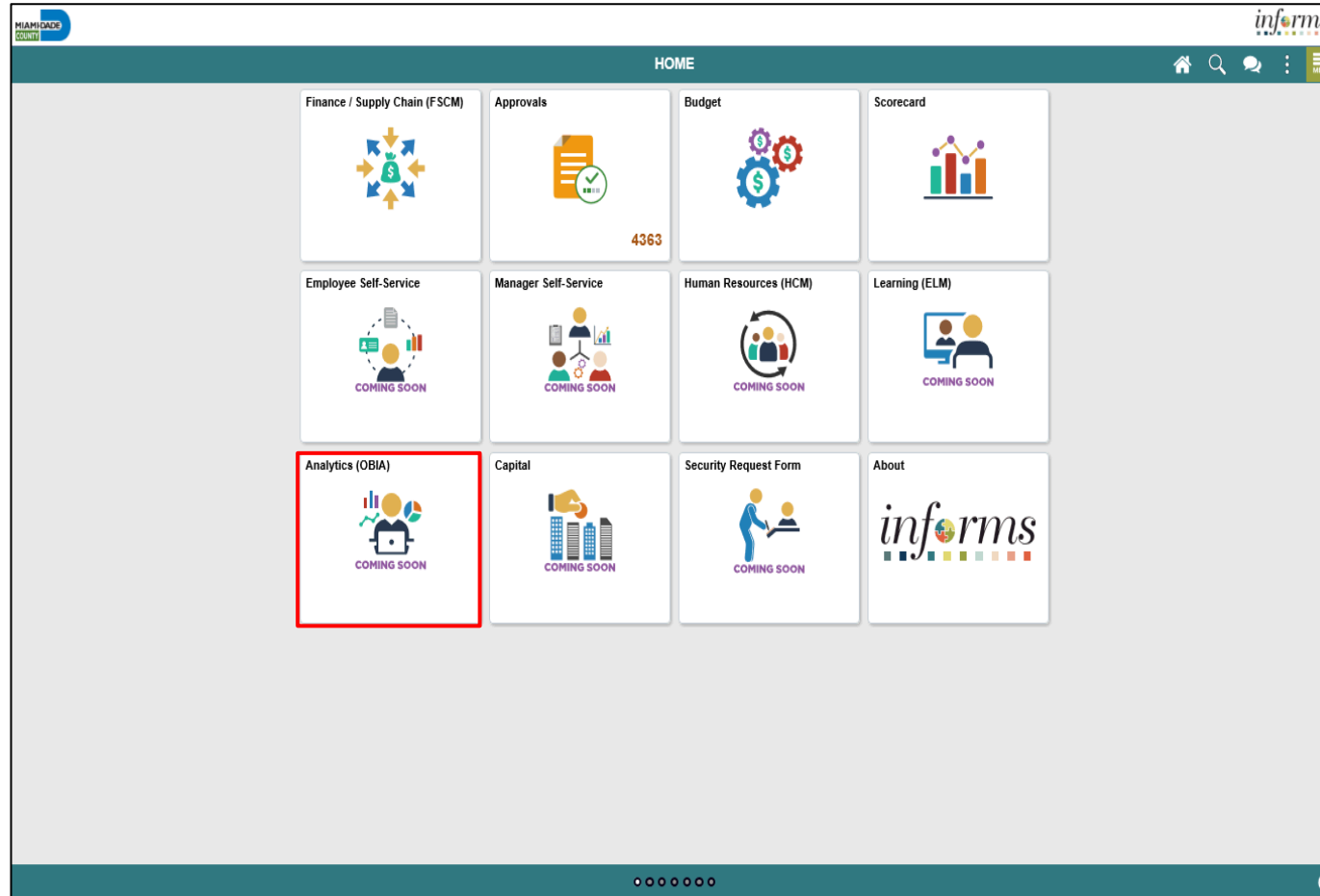
Role	Responsibilities
Time and Labor User	The Time and Labor User is responsible for reviewing Time and Labor dashboard reports.
Recruitment User	The Recruitment User is responsible for reviewing Recruitment dashboard reports.
Central HR User	The Central HR User is responsible for reviewing Human Resources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

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 Recruitment and Time and Labor subject areas.

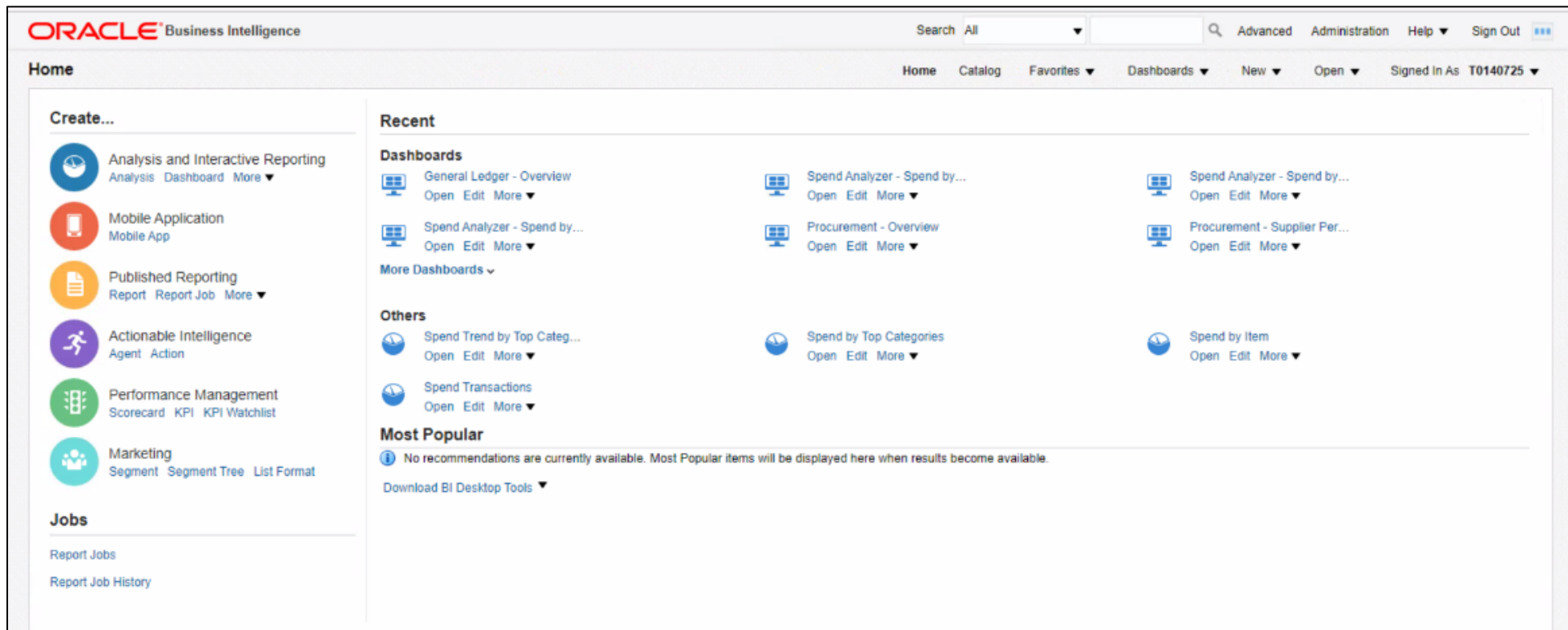
Navigation Continued...

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



Navigation Continued...

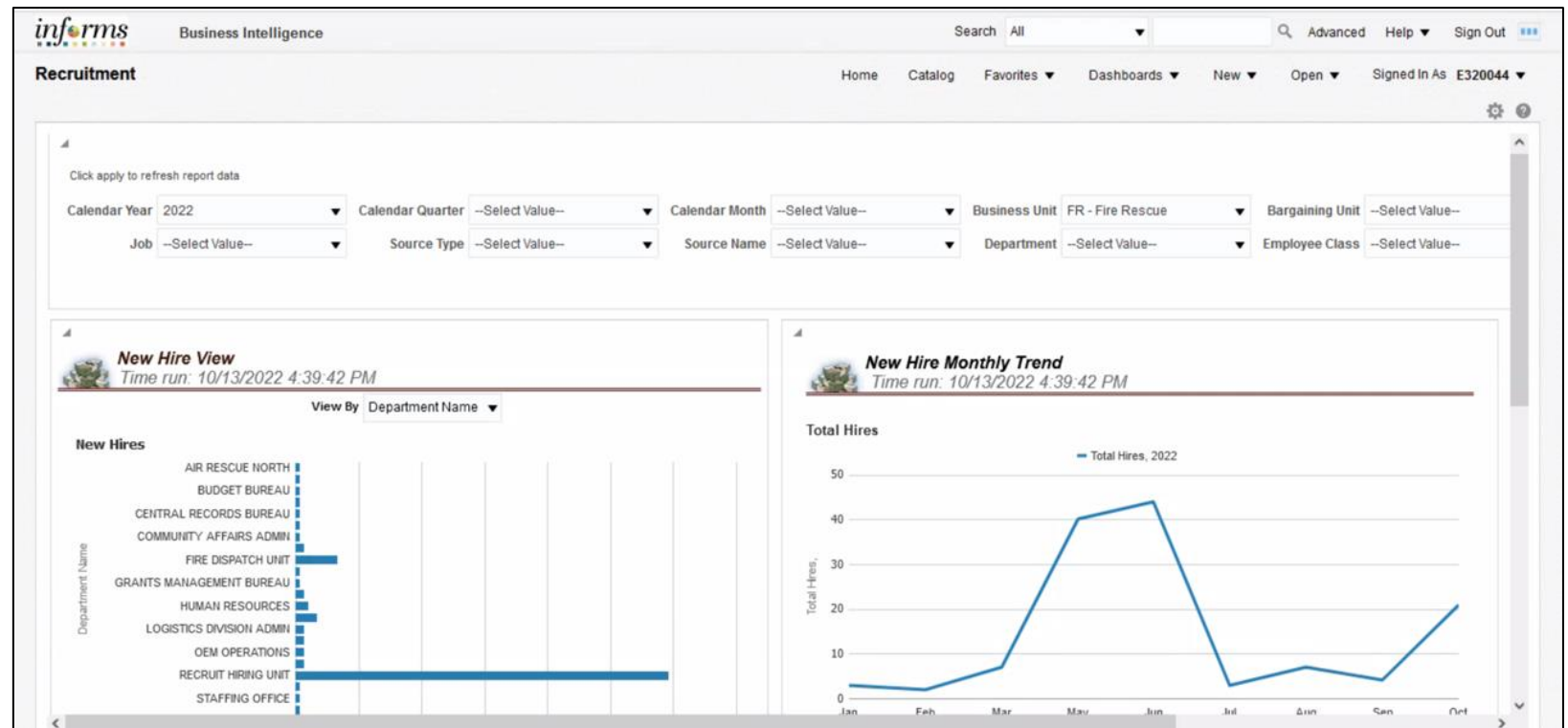
2. After selecting Analytics (OBIA), the INFORMS Business Intelligence home page will open. From the screen pictured below, navigate to dashboards and reports.



Navigation: Financials

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

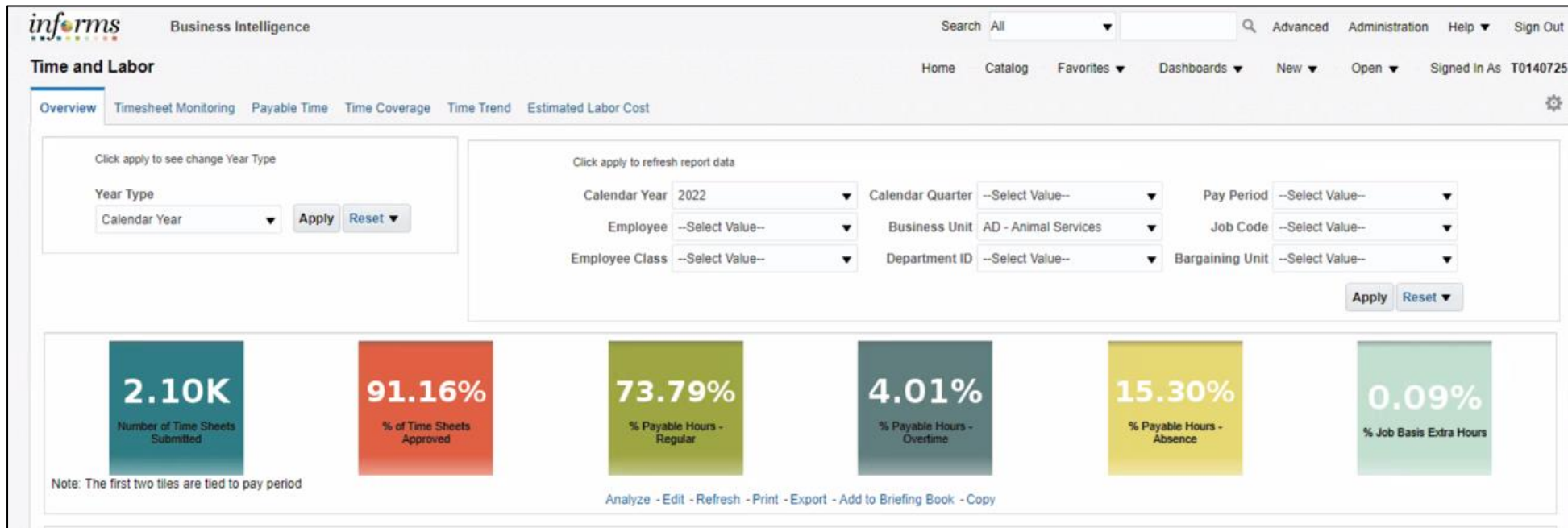
- Overview



Navigation: Financials, Continued...

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

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



Purpose and Benefits to Analytics

OBIA (Oracle Business Intelligence Applications)

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

What Business Intelligence is NOT

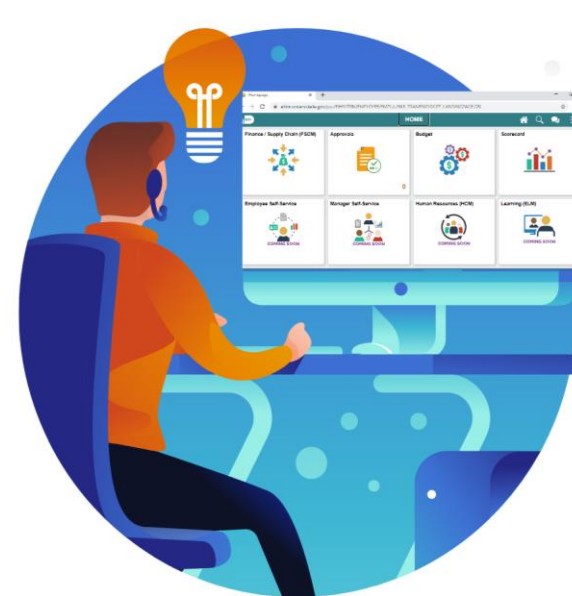
- Detail transactional reports. This type of reporting is found within INFORMS queries and reports.
- Real time reporting. OBIA is updated on a nightly basis any transactions created and posted during the day will not be available until the next day.

Introduction to Activities and Exercises

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



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of Analytics

Introduction to Demonstrations, Activities, and Exercises

Module 2: INFORMS BI Process

Module Topics

Module Introduction

Lesson 1: INFORMS BI Basics

Lesson 2: Dashboards and Reports

Lesson 1: INFORMS Basics

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

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

Lesson 1: Key Terms

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

Lesson 1: INFORMS BI Basics

INFORMS Business Intelligence is a tool that:

- Provides easy access to information across a wide range of audiences through self-service reporting and analysis (Recruitment and Time and 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.

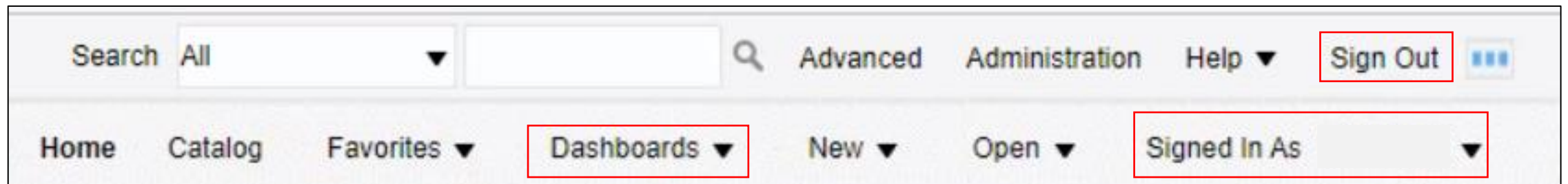
Lesson 1: INFORMS BI Basics, Continued...

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

Lesson 1: INFORMS BI Basics, Continued...

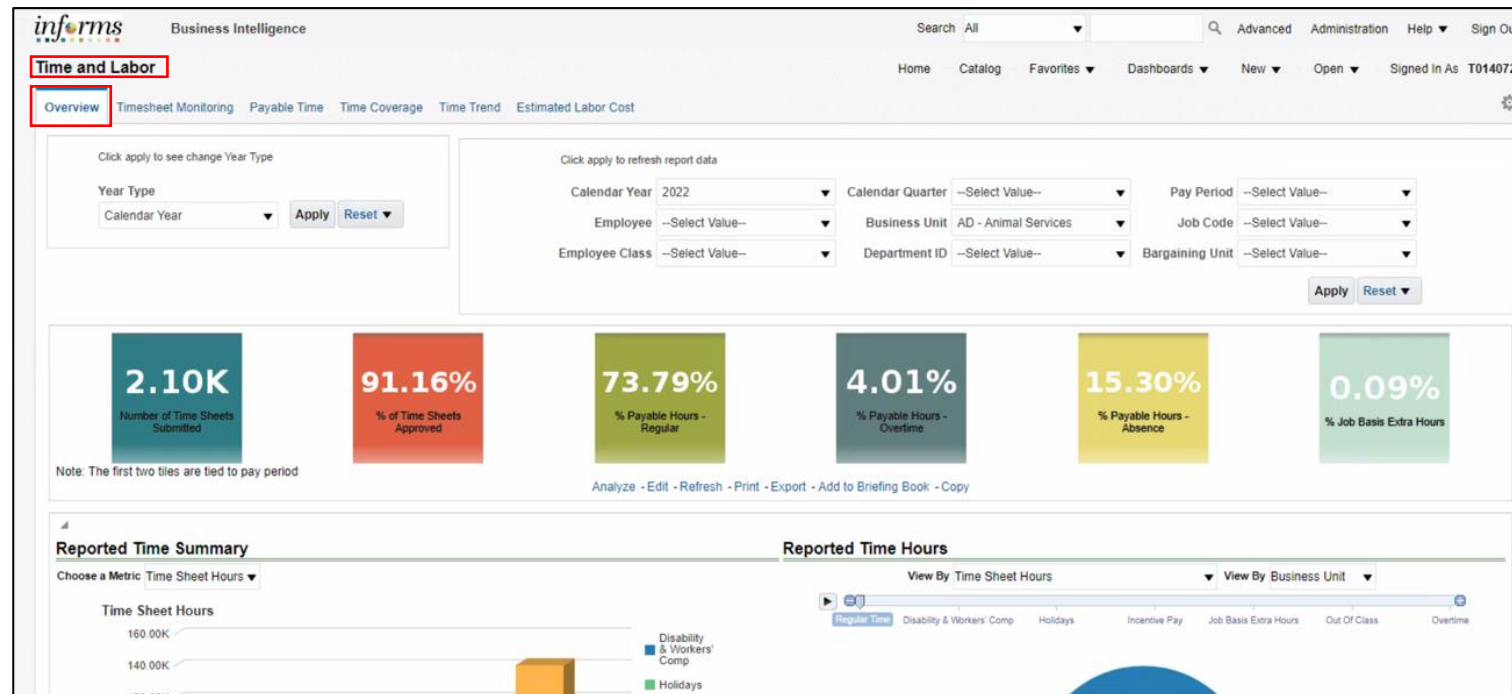
Once logged in, the **Global Header** provides quick access to commonly used functions:

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



Lesson 1: INFORMS BI Basics, Continued...

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



Lesson 1: INFORMS BI Basics, Continued...

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

Note: Prompts vary based on the dashboard selection.

Page 2
Click apply to refresh report data

Calendar Year	2022	▼	Calendar Quarter	--Select Value--	▼	Pay Period	03-OCT-22	- 16	▼	Business Unit	BU - Management and Budg	▼	Bargaining Unit	--Select Value--	▼
Employee Class	--Select Value--	▼	Department ID	--Select Value--	▼	Employee	--Select Value--	▼	Job Code	--Select Value--	▼				

Cancel Previous **Apply** Reset ▼

Lesson 1: INFORMS BI Basics, Continued...

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

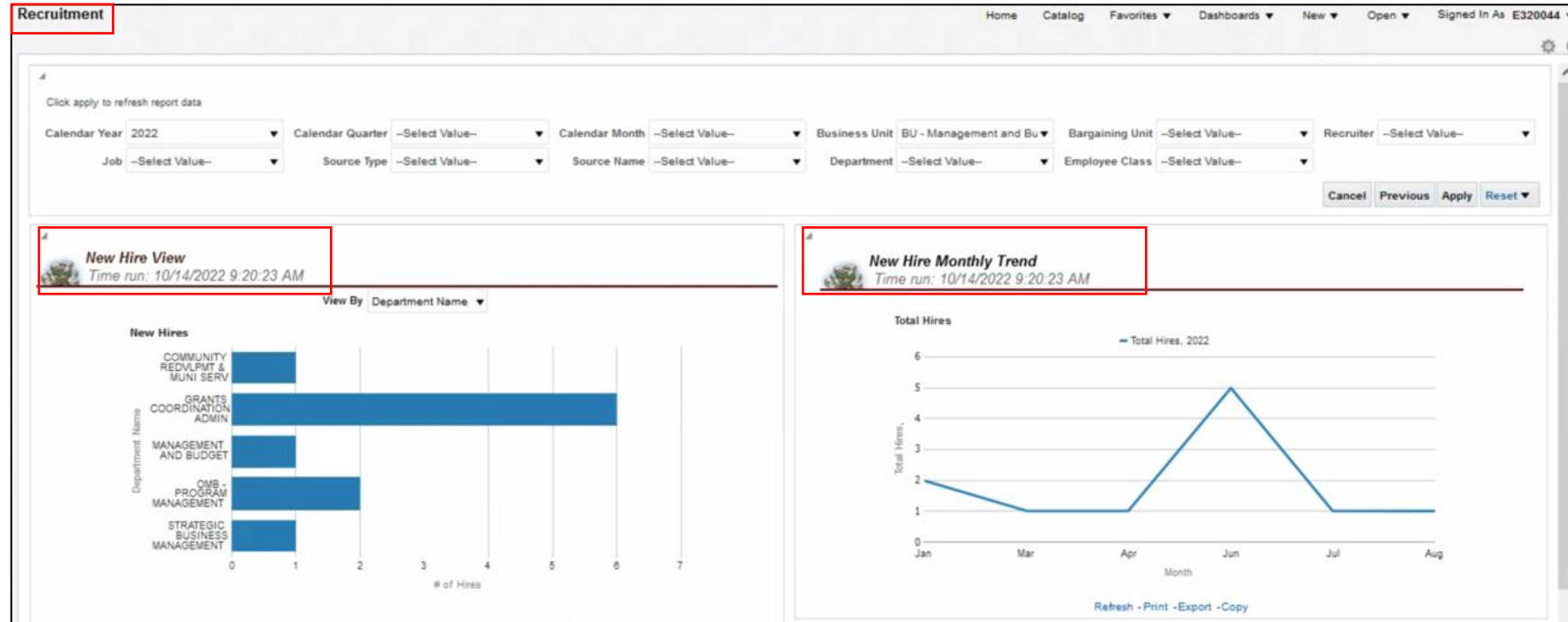
The screenshot shows a web application interface with three dropdown menus: "Fund Type", "Fund Rollup", and "Fund". Each dropdown menu currently displays "--Select Value--". The "Fund" dropdown menu is open, showing a list of fund categories with checkboxes:

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

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

Lesson 1: INFORMS BI Basics, Continued...

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



Lesson 1: INFORMS BI Basics, Continued...

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

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



No Results

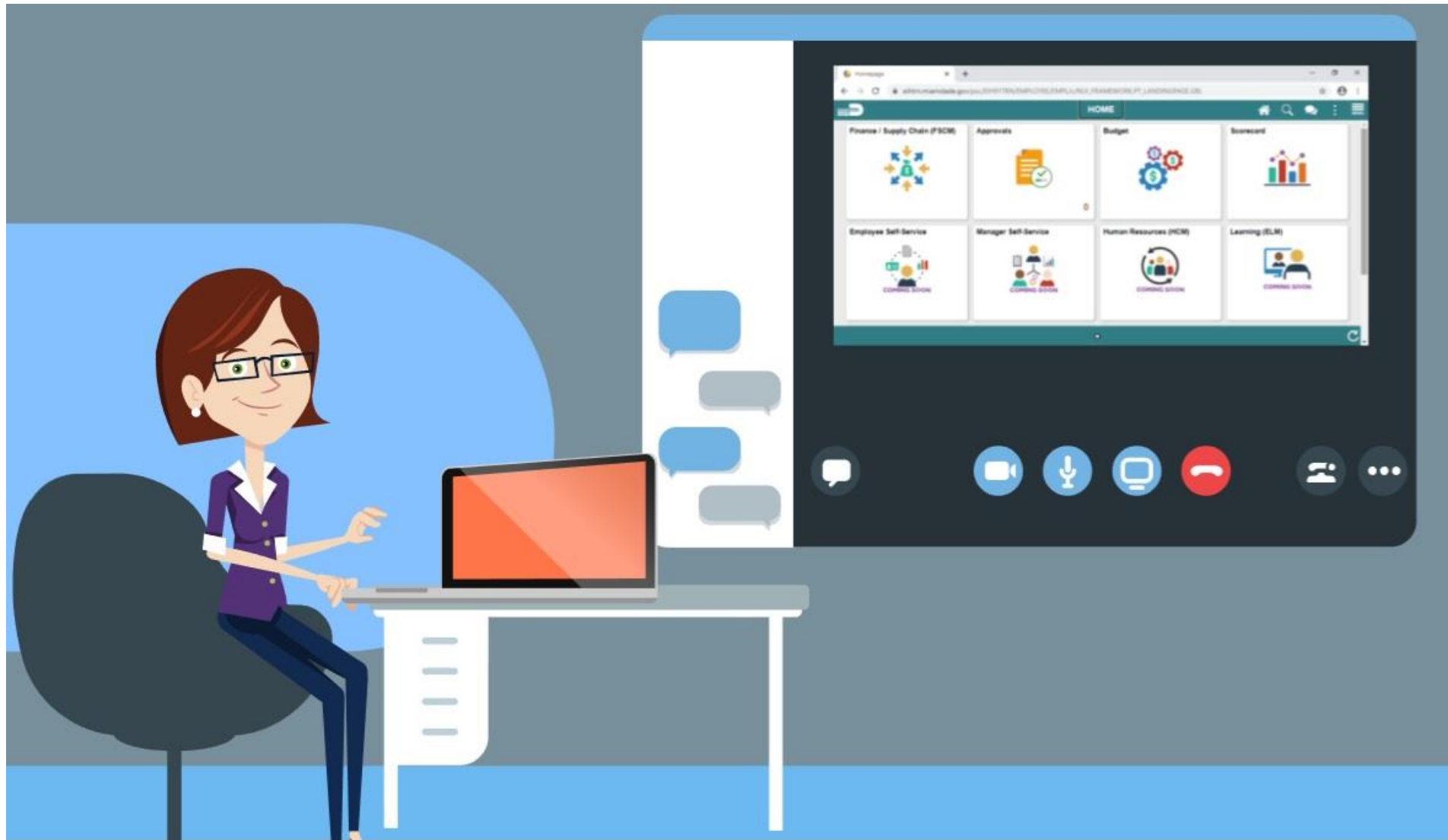
The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again. The filters or selection steps currently being applied are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

Filters

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

Analyze - Refresh

Lesson 1: Demonstrations and Activities



Lesson 1: Lesson Summary

Having completed the INFORMS BI Basics lesson, you now know:

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

Lesson 2: Dashboards and Reports

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

- Understand prompts and use prompt capabilities to filter report data
- Understand 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

Lesson 2: Key Terms

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	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 select or click and drag to move between the different options.

Lesson 2: Key Terms, Continued...

Term	Definition
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.

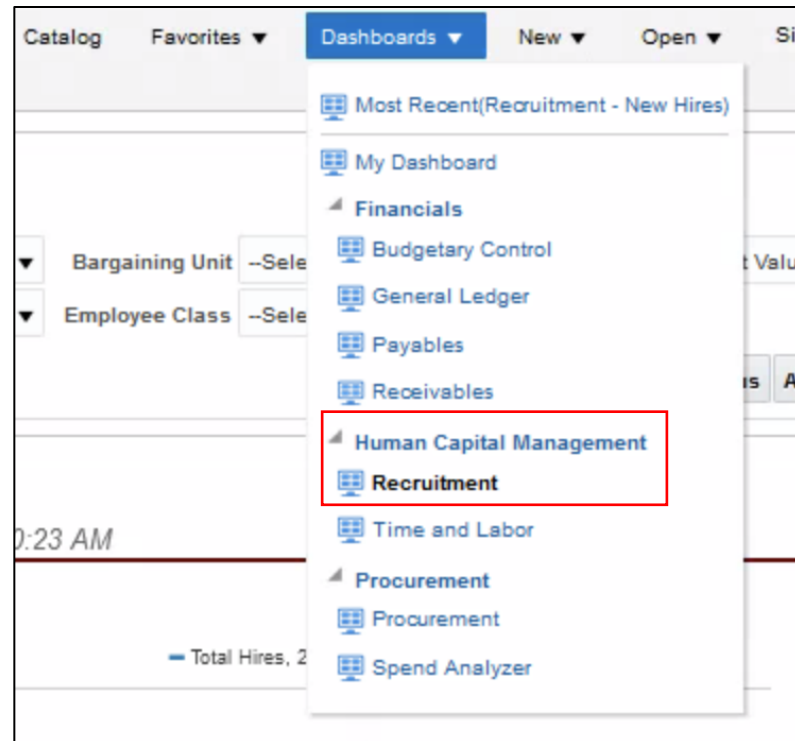
Lesson 2: Dashboards and Reports

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

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

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

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

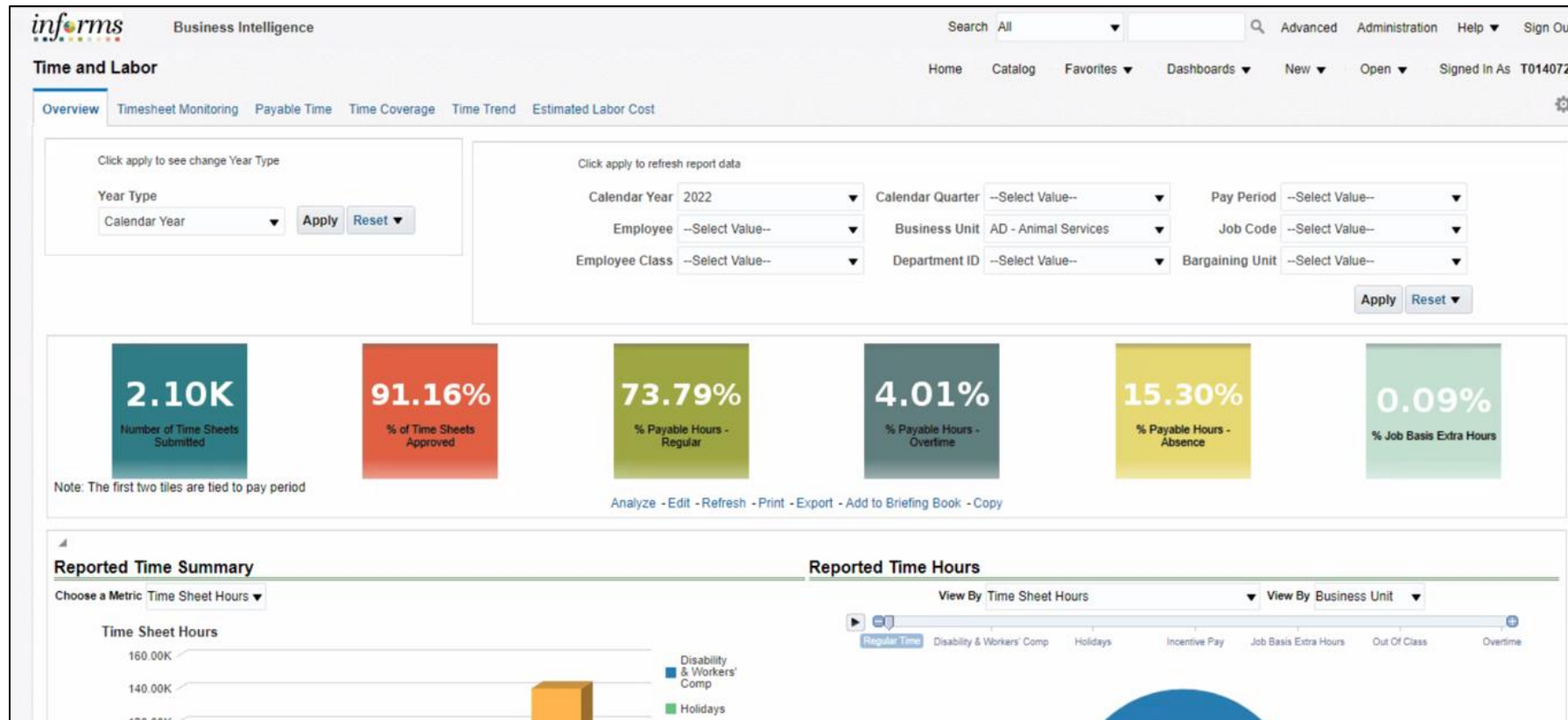


Lesson 2: Dashboards and Reports, Cont'd...

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

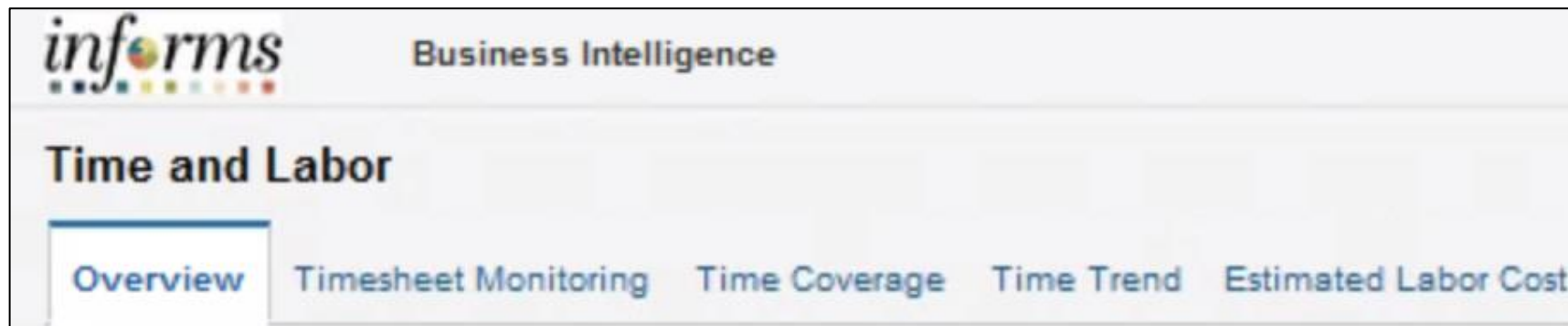
Lesson 2: Dashboards and Reports, Cont'd...

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



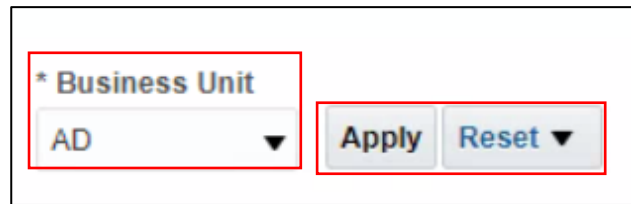
Lesson 2: Dashboards and Reports, Cont'd...

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



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

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



A screenshot of a report prompt interface. It features a dropdown menu labeled "* Business Unit" with the value "AD" selected. To the right of the dropdown are two buttons: "Apply" and "Reset". A red rectangular box highlights the dropdown menu and the "Apply" button.

The **Reset** button provides three options:

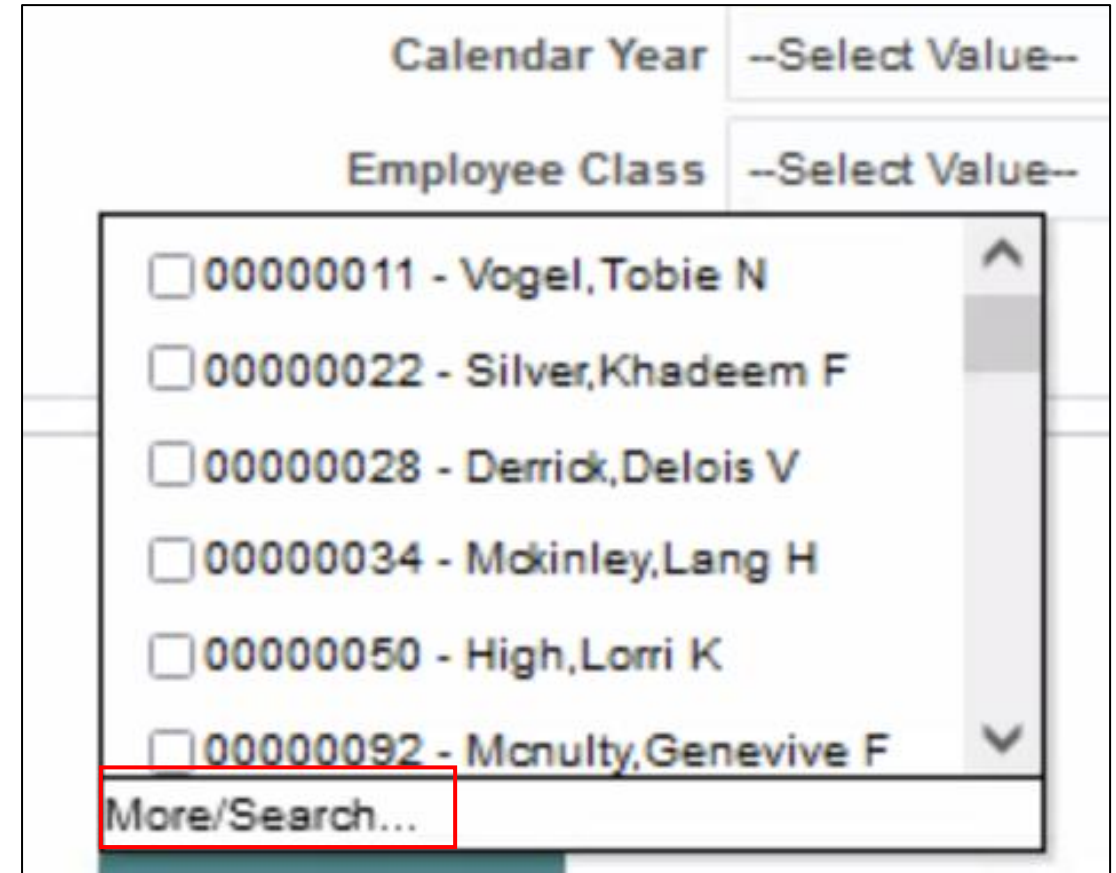
- **Reset to last applied values**
- **Reset to default values**
- **Clear All**



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

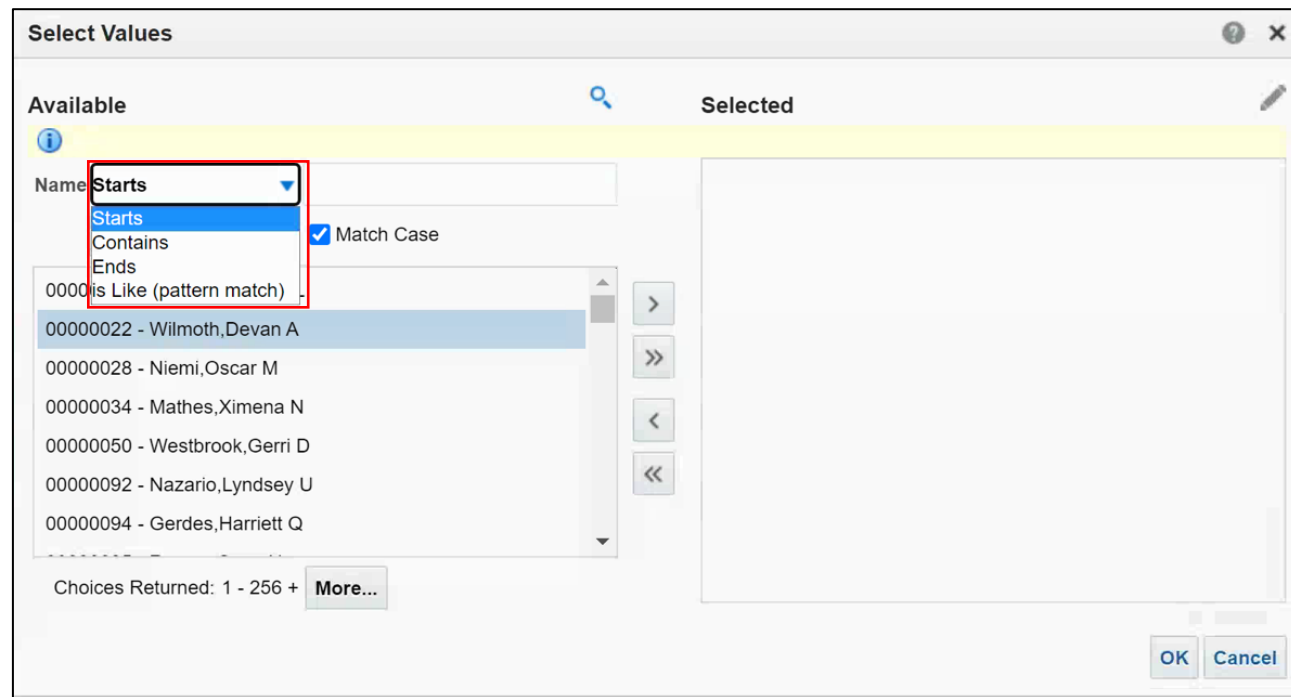
Lesson 2: Dashboards and Reports, Cont'd...

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



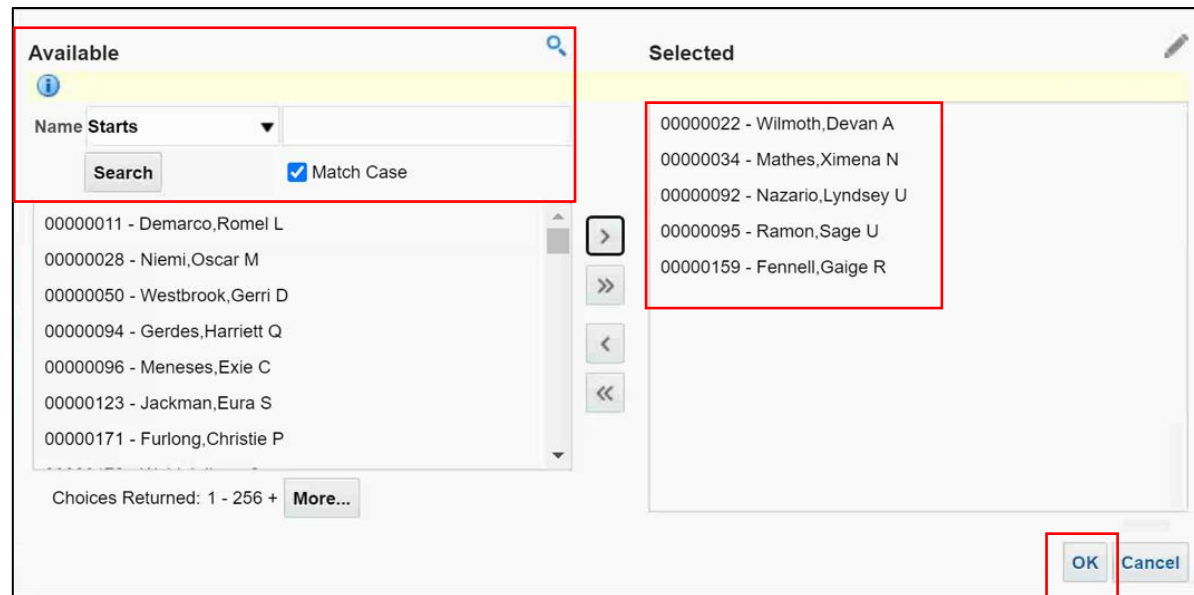
Lesson 2: Dashboards and Reports, Cont'd...

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



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

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



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

Prompts

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

The screenshot displays two filter panels. The left panel, 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 panel, titled "Click apply to refresh report data", contains several dropdown menus: "Calendar Year" (2022), "Calendar Quarter" (--Select Value--), "Pay Period" (17-OCT-22 - 30), "Employee" (--Select Value--), "Business Unit" (BU - Management and Budg), "Job Code" (--Select Value--), "Employee Class" (--Select Value--), "Department ID" (--Select Value--), and "Bargaining Unit" (--Select Value--). It also includes "Apply" and "Reset" buttons.

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

- **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.

Click apply to see change Year Type

Year Type
Calendar Year ▼ Apply Reset ▼

Click apply to refresh report data

Calendar Year 2022 ▼ Calendar Quarter --Select Value-- ▼ Pay Period 17-OCT-22 - 30 ▼
Employee --Select Value-- ▼ Business Unit BU - Management and Budg ▼ Job Code --Select Value-- ▼
Employee Class --Select Value-- ▼ Department ID --Select Value-- ▼ Bargaining Unit --Select Value-- ▼
Apply Reset ▼

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

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

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

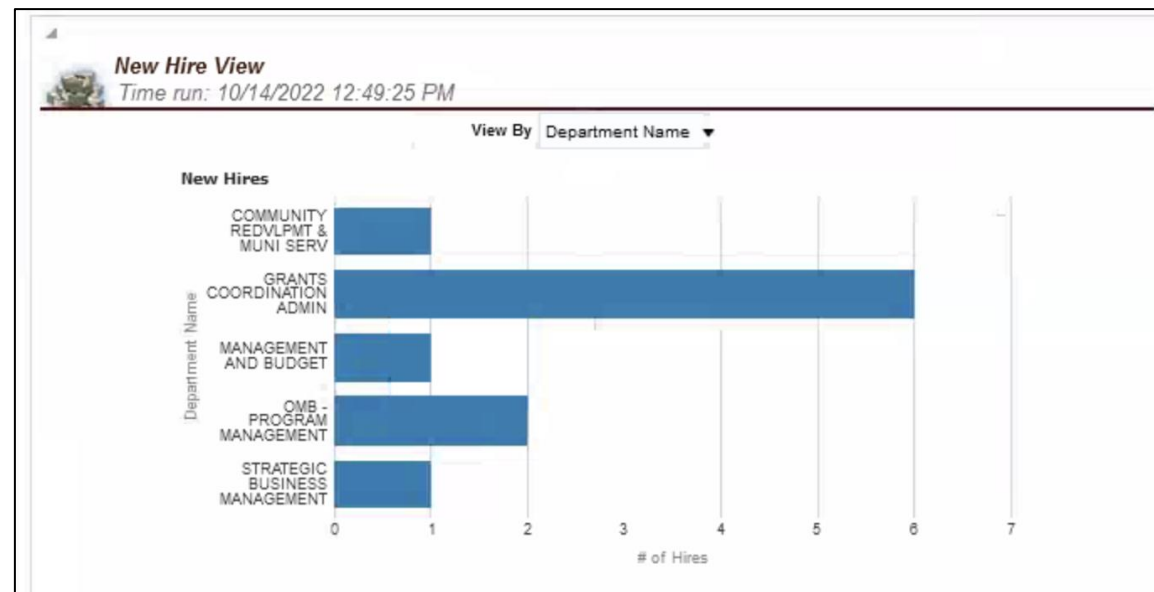
- **Table** displays results in a visual representation of data organized by rows and columns.

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	51.00	51.00				
				00013570	Luck,Itzayana G	Thao Lasalle	PROGRAM COORDINATOR OMB	Exempt	BU05010000	MPPA	111 NW 1ST ST	Regular Time	REG	REG	52.00	52.00				
				00015898	Edmonds,Telma D	Harmony Frederick	ACCOUNTANT 1	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	20.00	20.00				
				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	WH	WRKHM	68.50	68.50				
				00027177	Moncrief,Bassem Y	Dayna Densmore	ERP BUSINESS ANALYST 2	Exempt	BU07010000	STRATEGIC BUSINESS MANAGEMENT	OTV South Floor 21	Regular Time	REG	REG	24.00	24.00				
				00032324	Guzman,Leif C	Harmony Frederick	ACCOUNTANT 2	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	63.00	63.00				
				00032564	Falcon,Russell V	Elta Luster	SPC PROJECTS ADMINISTRATOR 1	Exempt	BU06010000	GRANTS COORDINATION ADMIN	111 NW 1ST ST	Regular Time	WH	WRKHM	56.00	56.00				

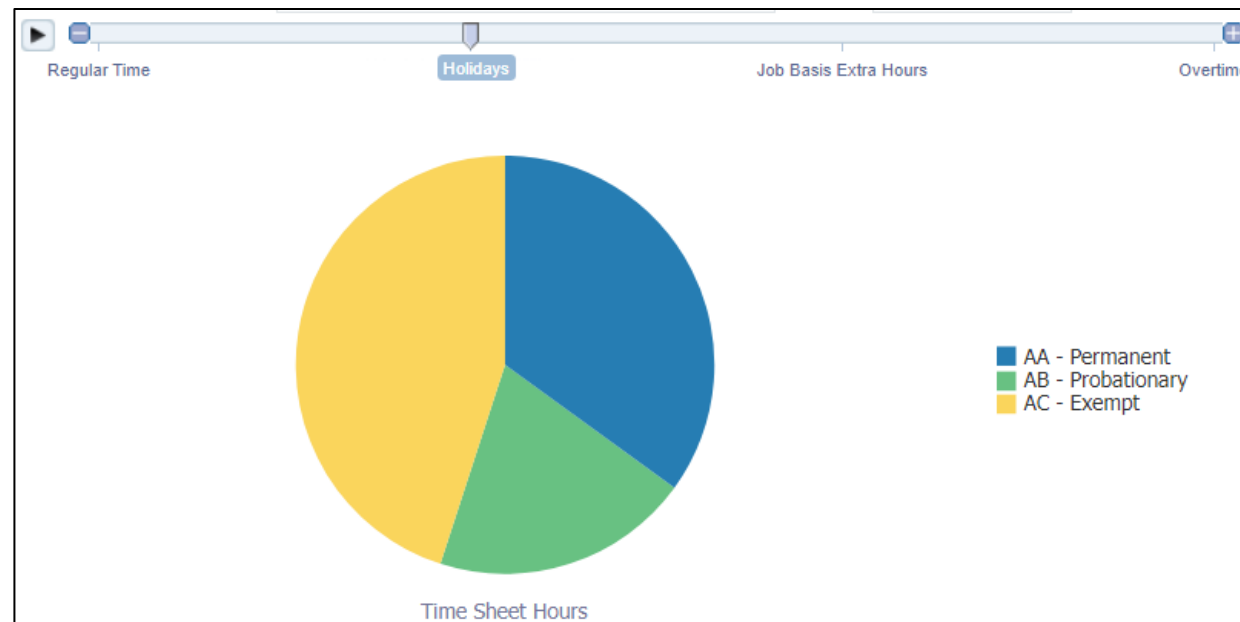
Lesson 2: Dashboards and Reports, Cont'd

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



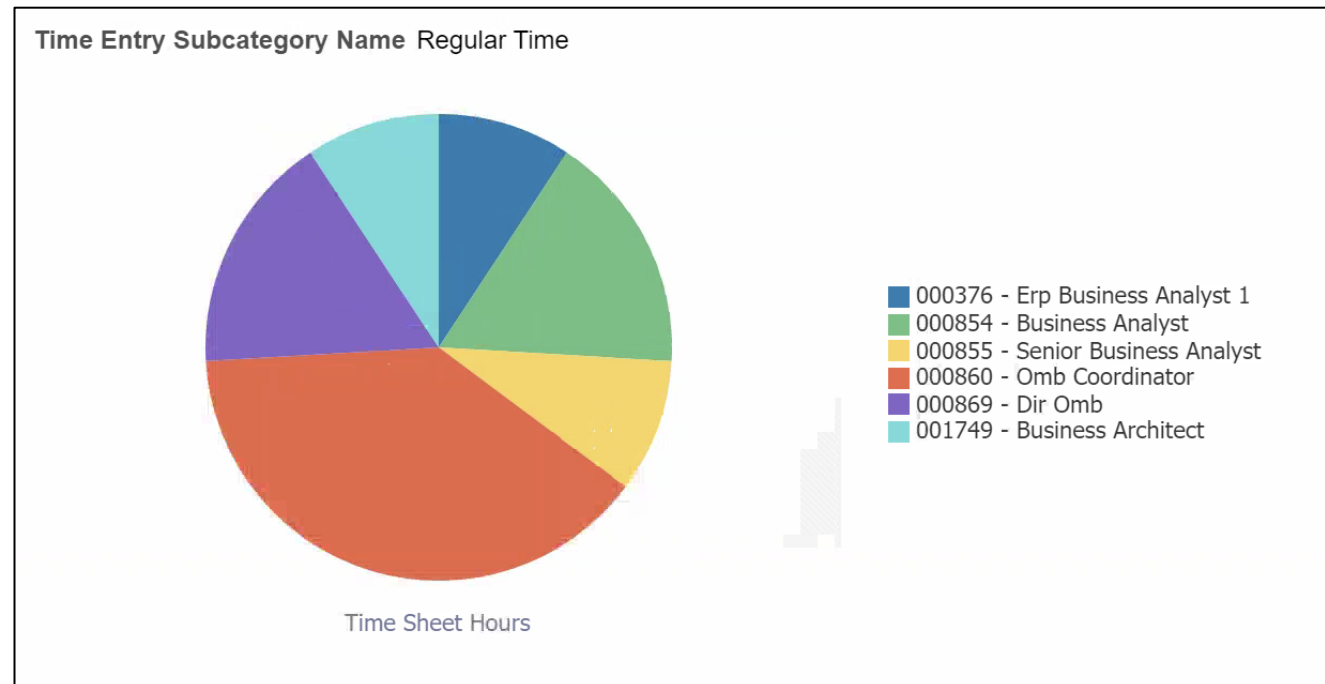
Lesson 2: Dashboards and Reports, Cont'd

- **Slider** 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 select or click and drag to move between the different options.



Lesson 2: Dashboards and Reports, Cont'd

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



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

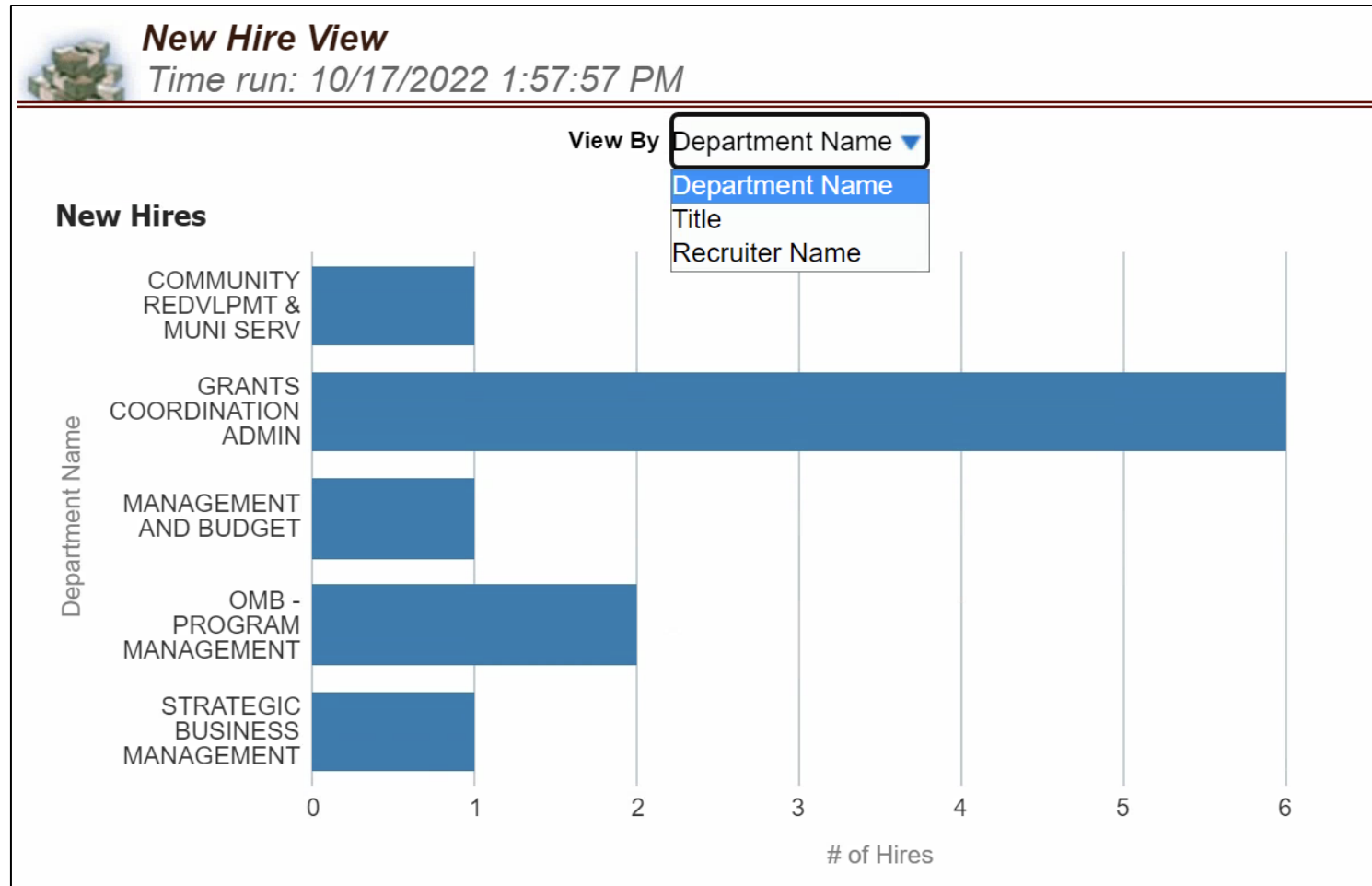
INFORMS BI has different types of views when analyzing a report.

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

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

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

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



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

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

The screenshot displays the 'informis Business Intelligence' interface. The main heading is 'Time and Labor'. Below this, there are several tabs: 'Overview', 'Timesheet Monitoring', 'Payable Time', 'Time Coverage', 'Time Trend', and 'Estimated Labor Cost'. The 'Overview' tab is currently selected. The interface contains two main filter sections. The left section is titled 'Click apply to see change Year Type' and features a 'Year Type' dropdown menu with 'Calendar Year' selected, and 'Apply' and 'Reset' buttons. The right section is titled 'Click apply to refresh report data' and contains several dropdown menus: 'Calendar Year' (set to '2022'), 'Calendar Quarter' (set to '--Select Value--'), 'Employee' (set to '--Select Value--'), 'Employee Class' (set to '--Select Value--'), 'Business Unit' (set to 'AD - Animal Services'), 'Department ID' (set to '--Select Value--'), 'Pay Period' (set to '--Select Value--'), 'Job Code' (set to '--Select Value--'), and 'Bargaining Unit' (set to '--Select Value--'). There are 'Apply' and 'Reset' buttons at the bottom right of this section. The top navigation bar includes a search bar, 'Advanced', 'Administration', 'Help', and 'Sign Out' options. The bottom right corner shows the user is signed in as 'T0140725'.

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

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

Reported Time Hours

View By Time Sheet Hours View By Business Unit

Regular Time Overtime

Time Sheet Hours

Analyze - Edit - Refresh - Print - Export - Add to Briefing Book - Copy

View Reported and Processed Time

Reported and Processed Time Details

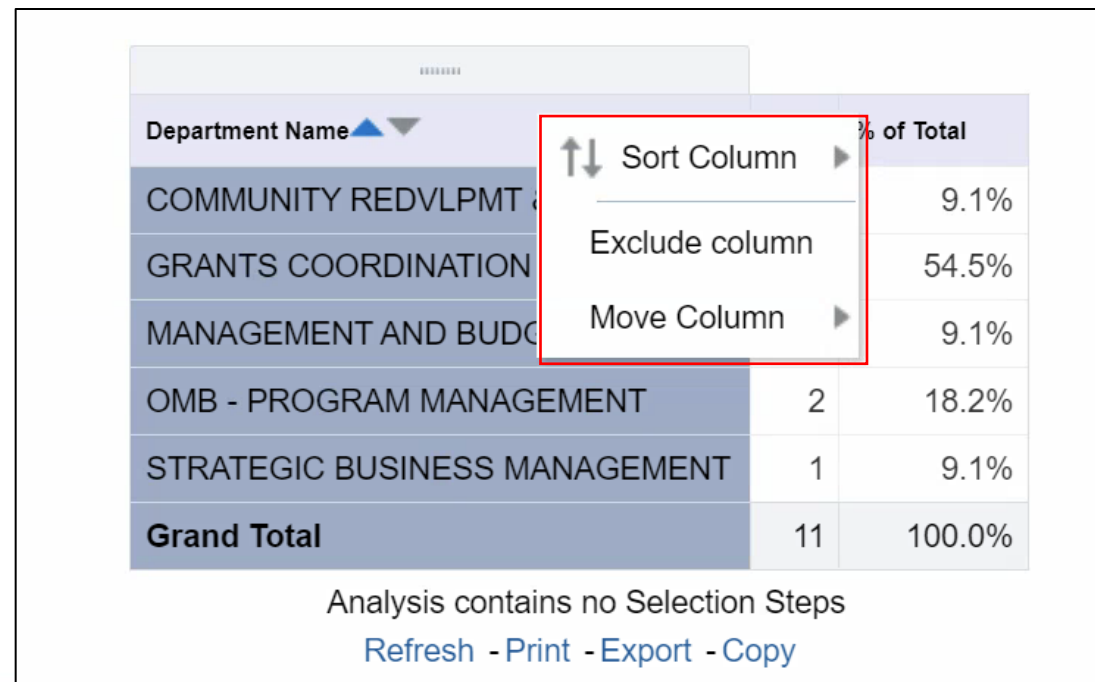
Year Name	Quarter Name	Month Name	Time Sheet Period Name	Employee Number	Employee Name	Supervisor Name	Position Name	Employee Class Name	Department Number	Department Name	Location Name	Time Entry Subcategory Name	Time Entry Name	Time Entry Code	Time Sheet Hours	Payable Hours
2022	2022 Q 4	2022 / 10	17-OCT-22 - 30-OCT-22	00019796	Fonseca,Treasa Z	Kimberley Siegel	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	OCC 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, Cont'd...

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

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

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

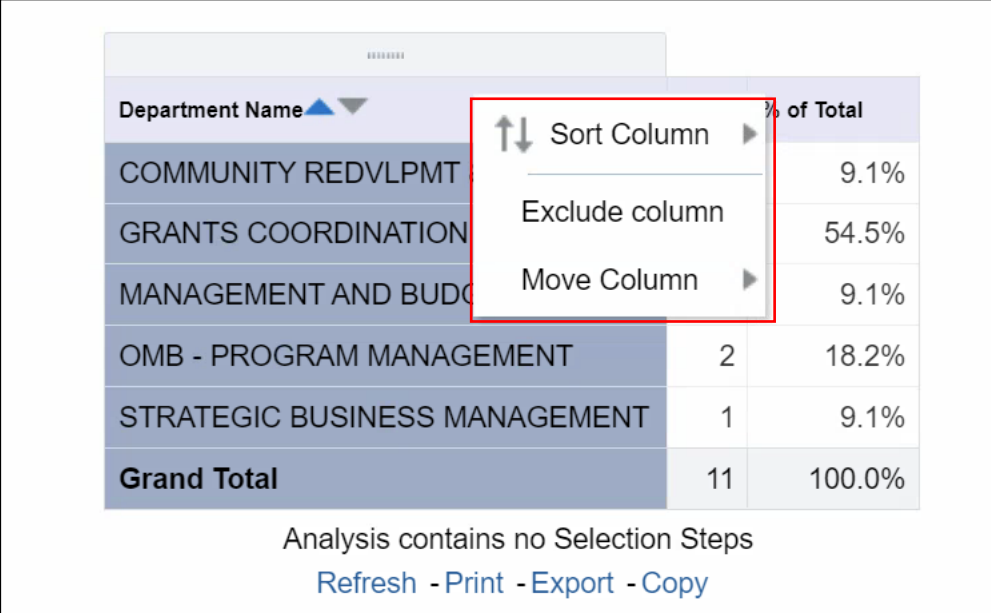


Department Name		% of Total
COMMUNITY REDVLPMT		9.1%
GRANTS COORDINATION		54.5%
MANAGEMENT AND BUDG		9.1%
OMB - PROGRAM MANAGEMENT	2	18.2%
STRATEGIC BUSINESS MANAGEMENT	1	9.1%
Grand Total	11	100.0%

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

Lesson 2: Dashboards and Reports, Cont'd

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



The screenshot shows a data table with a context menu open over the 'Sort Column' option. The table has three columns: 'Department Name', an unlabeled column with values 2 and 1, and '% of Total'. The menu options are 'Sort Column', 'Exclude column', and 'Move Column'. Below the table, there is a message 'Analysis contains no Selection Steps' and a row of links: 'Refresh - Print - Export - Copy'.

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, Cont'd...

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

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, Cont'd...

- Use the **Return** button on a report page to display the original Report or the previous page of the report.
- Select on the **Return** button at the bottom of the page to view the previous page of the **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,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](#)

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

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

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

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

 Rows 1 - 25

Lesson 2: Dashboards and Reports, Cont'd

At the bottom of each Report, there is the ability to **Export** data from that specific Report.

Export

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

Lesson 2: Dashboards and Reports, Cont'd



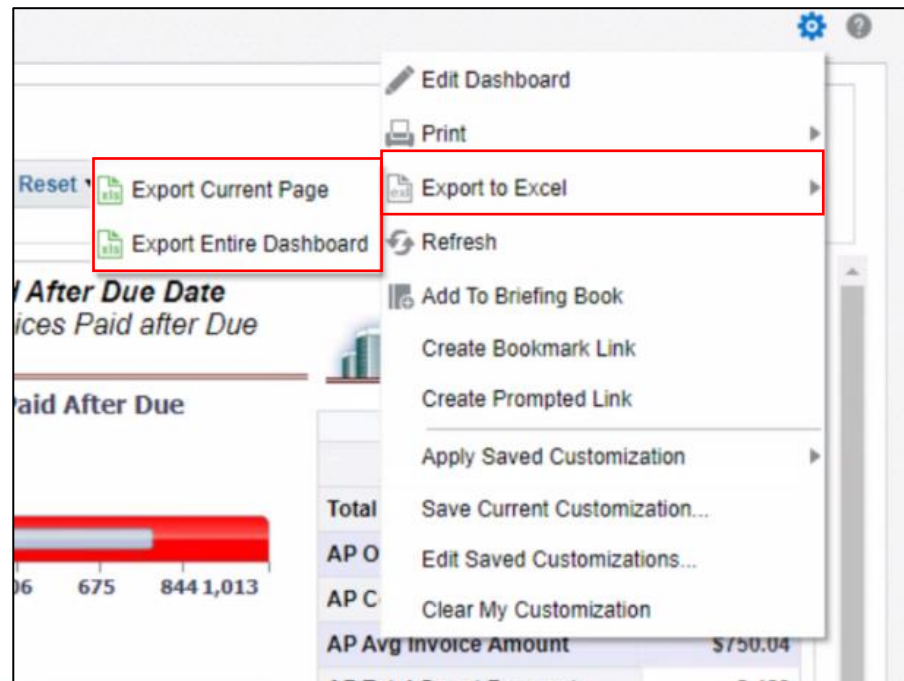
Note: Exporting data to a CSV file opens the file in Excel, which can then be saved as an Excel file. Printing more than ten (10) rows of data at a time when selecting PDF will result in only the rows that are presently showing on the dashboard being printed.

Lesson 2: Dashboards and Reports, Cont'd

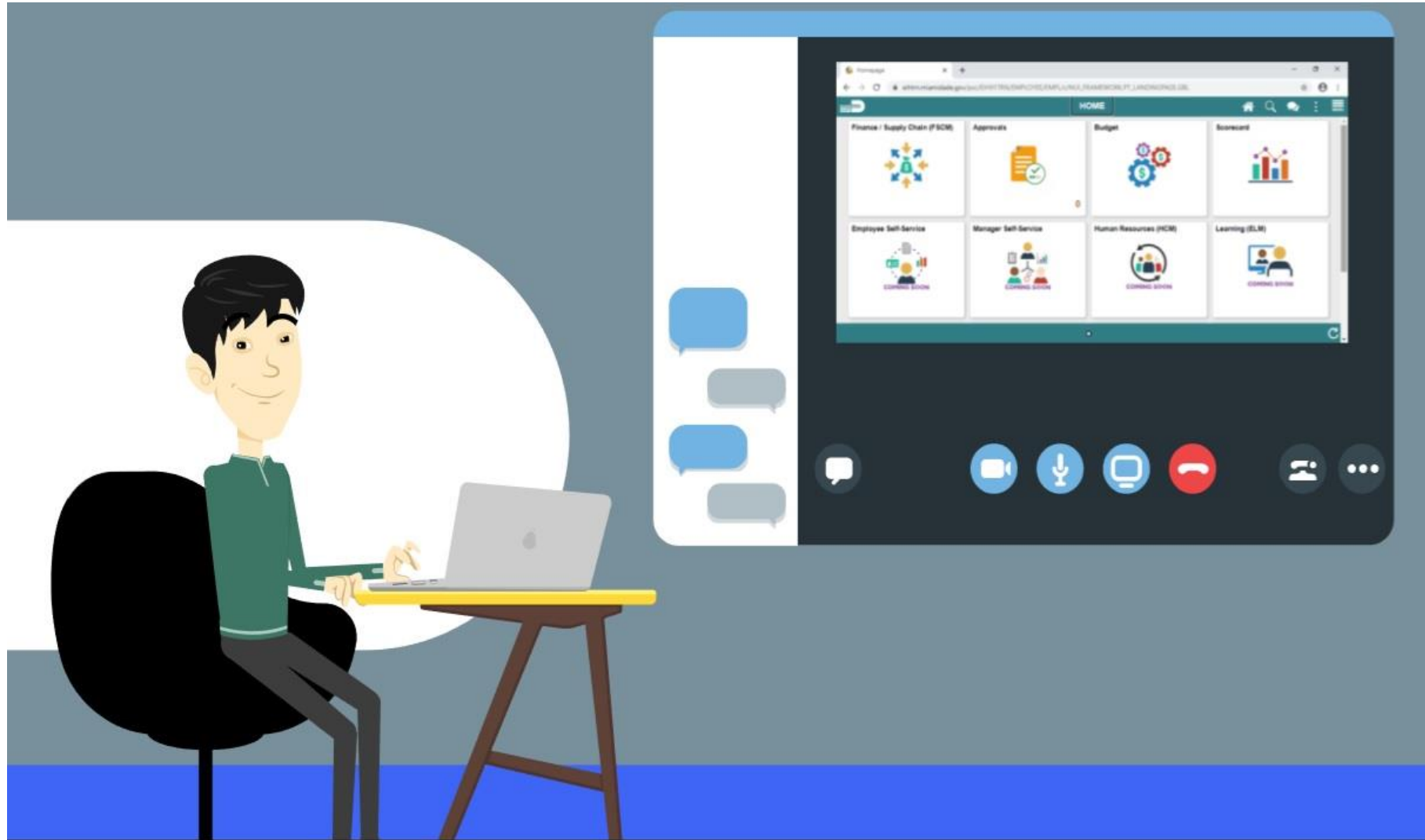
To export a current Dashboard page or all Dashboard pages to Excel.

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

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



Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Having completed the Dashboard and Reports lesson, you now know:

- To navigate through INFORMS BI, use the Dashboards link on the Global Header. Use the tabs within each Dashboard to navigate from one Dashboard page to another.
- Prompts are used on each Dashboard page to filter the data into smaller increments.
- Report tables 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

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*

Course Content Summary

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

- The purpose of INFORMS BI
- How to use the Global Header
- How to access and use dashboards and reports
- Prompts and how to use prompt capabilities to filter report data
- Drilldowns and guided navigation between dashboard pages
- Available report features
- Various report and graph types
- How to manipulate report columns
- How to use different print and export options

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

Additional Training and Job Aids

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



CONGRATULATIONS

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

BI 022 – HCM Reporting Capabilities (View Only)