MI - Generate Report

This is an explanation of how to access, view and filter management information (MI) reports from the reporting system, Oracle Business Intelligence Enterprise Edition (OBIEE).

Each user will have a pre-defined access level set depending on their grade and job role. This will be built into the system and will only allow access to the necessary level of data required.

The user will access the MI reports via a desktop icon that provides web based access via internet explorer.

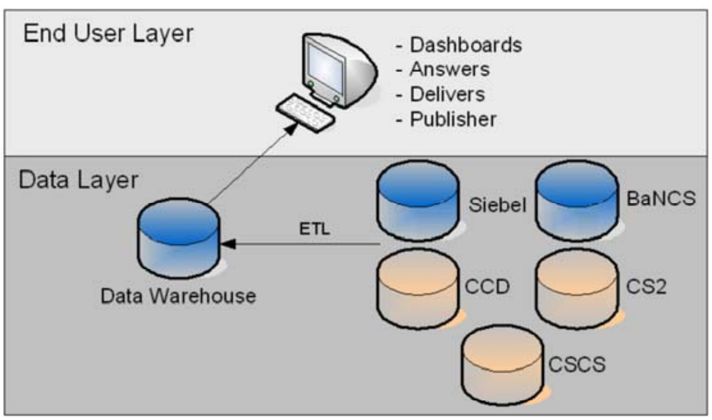
Pre populated reports have been created to meet all key business measures and indicators and some reports have the ability to filter to tailor the results to individual requirements.

To access all training materials relating to OBIEE, including fact sheets and emulations, select this link.(intranet)

How to access reports

Reports are displayed via Dashboards within the reporting systems. Users with pre-agreed access levels will determine the amount and type of information they require, relevant to the area of work, and, if the filters have been provided already, will be able to filter the detail of the reports to meet individual needs. Pre-agreed access levels for Ops MI are Consumer and Author: Consumer is read only, whereas Author has the ability to create ad-hoc reports. The information used for this will be fed to OBIEE from the Child Maintenance Group's (CMG) source data held within the Data Warehouse.

The diagram below is for illustrative purposes only but shows the source systems that Data Warehouse receives information from before passing to OBIEE:



OBIEE

All MI reports will be created within OBIEE. This is an umbrella term that refers to a variety of software applications used to analyse an organisation's raw data and information and develop reports. OBIEE will provide all MI for the CMG by collating information from the 1993/2003 systems, the 2012 system and BaNCS to the Data Warehouse and transforming the information into the required user level.

Access levels

Each user will have a pre-defined access level depending on grade and information requirement. This will be built into the system and will only allow access to these defined levels.

To open the system you will select the OBIEE desktop icon and enter a username and password. This icon provides web based access via internet explorer.

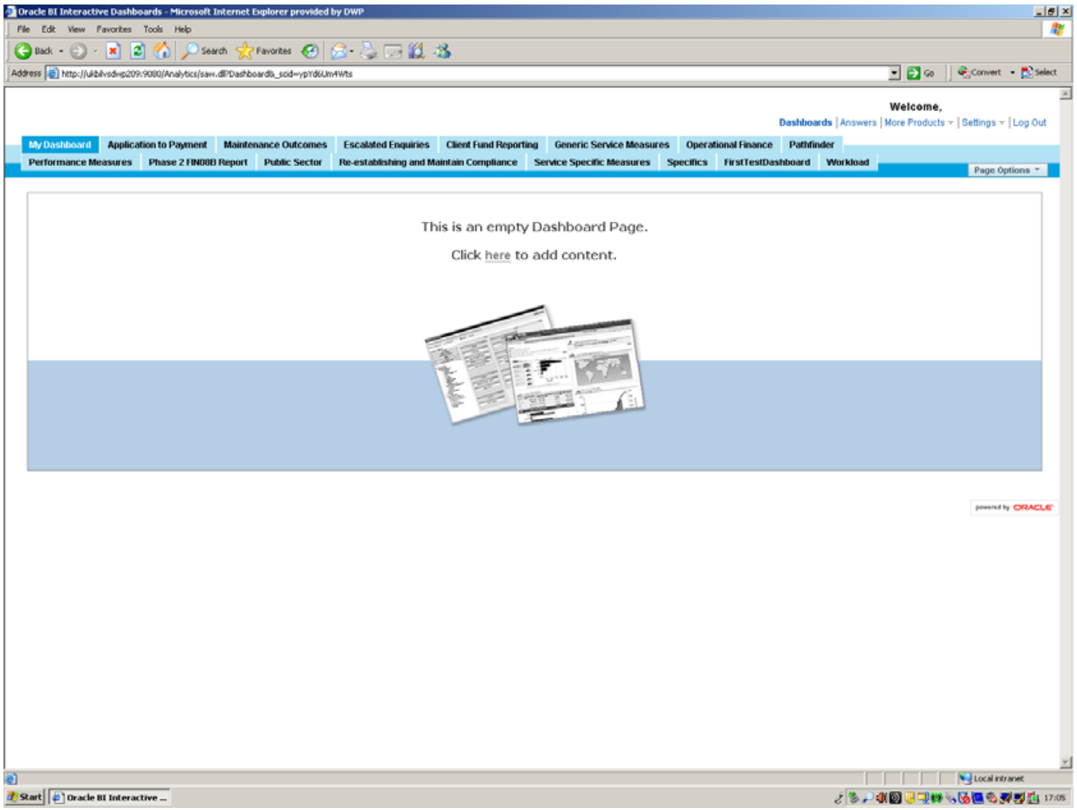
The view

There is no need to upload information or generate a report as this will happen automatically, overnight for the 2012 scheme. .

Below is a view of Ops MI. This is the view after log in. Each Dashboard will show the different groups of pre-determined reports available. A full list of pre-defined dashboards and reports can be found in the Legacy Data Warehouse Training Portal (intranet link).

Select a Dashboard to view the pre generated reports for each topic. Options to filter the report are available to gain more detailed information.

At the bottom of each page, there is a **Return** button. Using the return button allows users to navigate back through the report. There is also a **Refresh** button in the same menu which, when selected, will refresh the report.

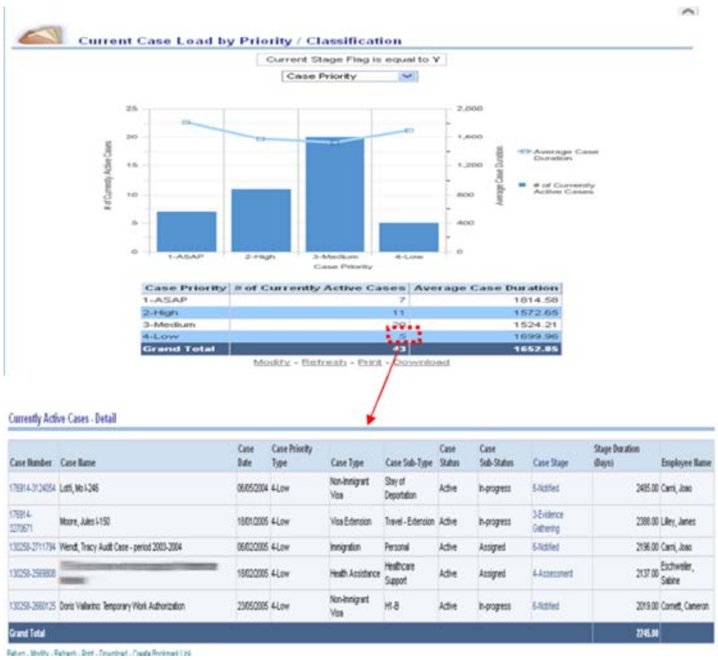


Reports and filters

The screen shot below shows an example of how to tailor the report to retrieve required information. The report parameters can be changed by adding pre-defined filters. Select the relevant drop down options from the View Selectors (as shown below) to create an updated report.

Once a report is filtered, highlight the area where further information is required and drill down into it. This is available through a blue hyperlink. A new screen is displayed. This creates an additional report, providing more detail for the specific area, allowing users to; investigate trends, compare work on hand, case priority and providing a more overall, in-depth view

The screenshot below, for illustration purposes only, shows how a user can select a hyperlink within a report to see specific information and navigate to another report.



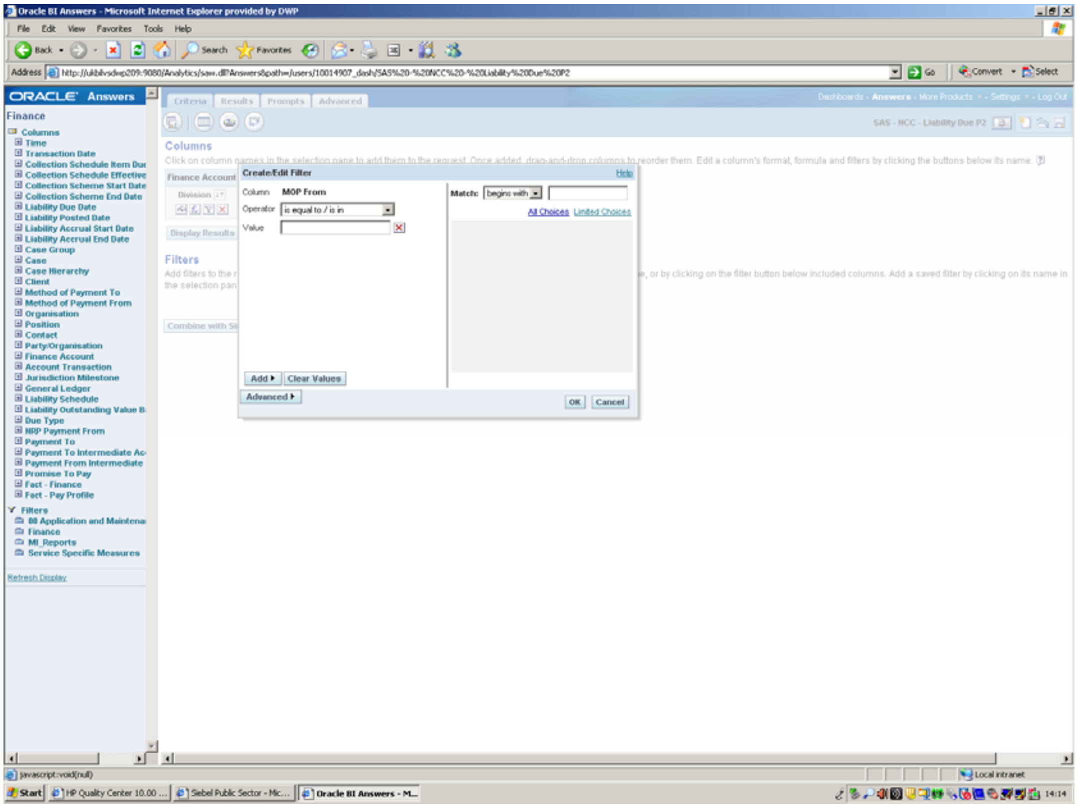
Answers reports

Selecting Answers reports allows users to build reports based upon pre-defined subject areas. Users are unable to modify the structure of a subject area.

Question mark (?) icons are displayed throughout Answers. Selecting the question mark icon will open the Help pages, displayed in a new window, which contain a wealth of useful tips and guides for using Answers.

To create a report:

1. Log in to OBIEE. You will be presented with your **Dashboard** page.
2. Select the **Answers** link at the top right hand side of the screen.
3. Select a **Subject Area**, for example, Case Financials, displayed underneath the Answers link in the work area section of the screen called **CMEC Case Financials**.
4. Dimensions (also known as Attributes) are shown in the **Columns** list at the left hand side of the screen. Select a **Dimension**, for example, Business Area Code. These are displayed in the tripane area on the left hand side of the screen, contained within a set of folders which can be expanded to see a full list of dimensions held in each folder. Business area codes are held within the Organisation Hierarchy folder.
5. Select a **Fact** (also known as a Measure) from the **Columns** list, for example, Number of cases. Facts are at the bottom of the tripane, below the dimensional folders. **Fact - Case** contains count of cases. Fact folders can be expanded to to see a full list of facts and measures available in a subject area.
6. Select the **Results** tab to view your report. In this example, the report will show the number of cases broken down by business area, not for any specified period but an accumulated figure.
7. To add additional Dimensions to the report, select the **Criteria** tab of the report you just created. Select further **Dimensions** from the **Columns** list into the **Workspace**. In this example, adding Scheme Name and System Name held in the Legacy Scheme folder will break the previous results down further to show the number of cases in each business area, broken down to show which system and scheme they belong to.
8. The order in which the columns are displayed in the report can make a big difference to its appearance. **Columns** can be dragged and dropped and moved around into your preferred order within the **Workspace** to change the way the report looks. Note, if columns are collected to another dimension such as an inbuilt hierarchy, they will link together in a report and won't separate. In this example, **Scheme** and **System** will unite, so **Business Area Code** cannot be put between them.
9. The results can be further refined by adding a **Filter**. Navigate to the **Criteria** tab of the report, where each Dimension and Fact will have its own set of icons. Selecting the **Filter** button, which looks like a funnel, will open the **Create/Edit Filter** window, shown in the screenshot below.

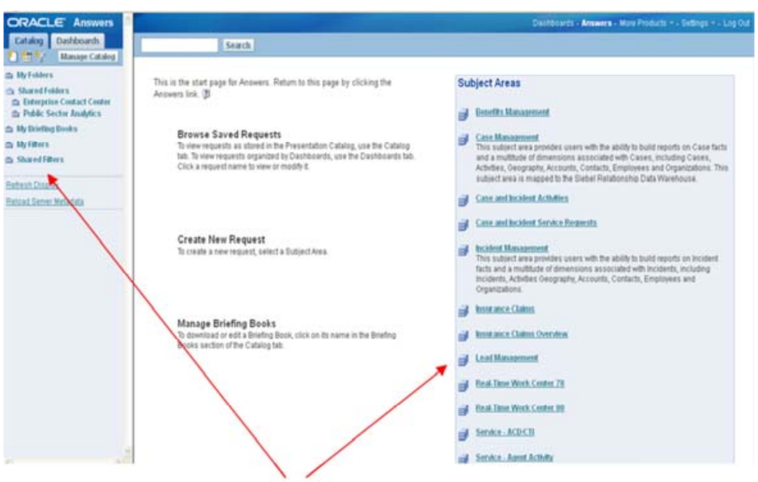


10. The **Operator** dropdown menu shows the selection of filters which can be applied, for example, **is equal to/is in**. Select the **Operator** menu and select **All Choices** to polulate all of the values, then select the value required, which will automatically populate the correct value into the **Value** field.

11. Select **OK** to apply the filter.

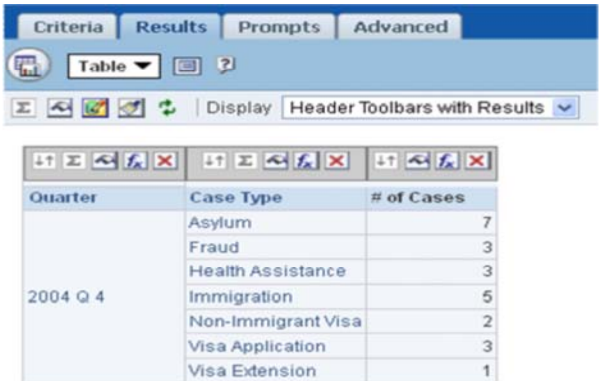
12. You will see that your selected filter is now showing in the **Workspace**, under **Filters**. To see what your report looks like now that the filter has been applied, select the **Results** tab.

13. Reports won't automatically add up the totals for each column; this must be configured manually. In the **Results** tab, select the **Edit View** button at the top of the report. Each column has its own set of buttons. Select the **Total By** button on your chosen column and extra rows will be added to the report to show the total amounts.

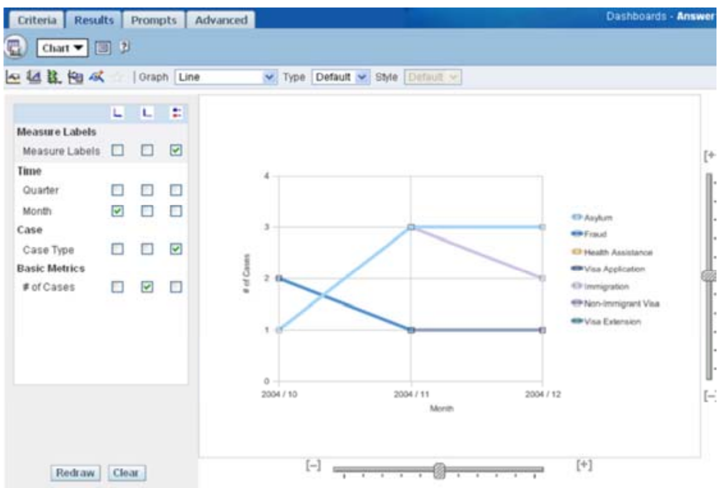


Drag and drop options

The screenshot above shows the Answers homepage.



Results, by default, will be shown in a table format as above but this view can be changed. Select the dropdown menu above the report, (shown in the example as **Table**), to change the format from the options which include **Chart** (shown in the screenshot below), **Line** or **Block graph**.



Users also have the functionality to produce timelines and review reports looking back over months and years to compare/contrast trends.

BI Publisher

BI Publisher allows you to publish reports. Reports created in Answers can be imported into Microsoft Word using the BI Publisher table wizard, where they can be formatted as required.

To create a simple BI Publisher report using a report previously created in Answers:

1. Before creating the BI Publisher report, the report must have already been created in Answers. Open **Answers** in OBIEE to find the name of the report you wish to use.
2. Minimise **Answers** and open **Microsoft Word**.
3. Select the **Oracle BI Publisher** tab in **Word**.
4. From the dropdown menu, select **Log On** and enter your username and password. This is the same username and password that is used to log into OBIEE.
5. The **Open Template** window will always open by default. This window can be opened at any time, using the **Open** option in the **Oracle BI Publisher** tab in MS Word.
6. In the **Open Template** window open the Answers report. Select **Oracle BI**, listed in the **Workspace** menu, as this is where the report was created. There will be 2 options; Users or Shared. If the report was saved in My Folders in OBIEE, select **Users** and double click your username in the list to display a list of available reports.
7. The report needs to be saved as an Oracle BI Publisher report before it can be put into the MS Word report template. Double click the report name. A new window will open, labelled **Save As Oracle BI Publisher Report**. Select the location where you wish to save the report, then select **Save**.

8. Now the report has been saved as an Oracle BI Publisher report, it can then be inserted into the Miscrosoft Word document. Ensure the curser is where you want the report to be inserted, then select the Oracle BI Publisher menu.
9. Select the Insert menu, then from the options select the Table Wizard menu. A new window will open.
10. Select Table as the report format and select Next twice.
11. In the next view, all of the columns that were used to create the report in Answers are displayed in the left hand pane. Select the arrow > to move the columns you want to appear in your report to the right hand pane, then select **Finish** to insert the table.
12. The structure of the table will be inserted into Word. The table can be modified using standard Word functionality. Before modifying anything, the report must be saved using the standard Word **Save As** menu. Save the report as a **Rich Text Format** type.
13. To preview the newly created table, select the **Oracle BI Publisher** menu and select **Preview Template**. Select your preferred program to view the report, for example, Adobe PDF. A new window will open showing your report, and from here it can be saved to your desired location.

Exporting reports

Exporting and sending reports

All reports are available to print and email, and copies can be produced in a number of formats e.g. PDF, Word, and Excel.

To export an Oracle report to Excel:

1. Select the **Download** link and choose either **Download to Excel** or **Download to Excel 2000**. The **File Download** dialogue box will appear.
2. Open it in Excel, or alternatively, save the file to your desired location.
3. Excel can then be used to refine the formatted results if desired. Note, the graph may populate over the top of your table so it may need to be moved around into your preferred order.

To download an Oracle report in a web page:

1. Navigate to the report.
2. Select the **Download** link and choose **Download Web Page** (MHTML).
3. The **File Download** dialogue box will appear.
4. Save the report to your desired location.

To email an Oracle Dashboard page or report:

1. Navigate to the dashboard page or report that you want to send.
2. Select the **Print** link and choose **HTML** or **PDF**.
3. A new browser window will open, containing the dashboard page or request.
4. From the browser's toolbar, select **File**, and **Save As**. Save the file to your desired location.
5. To email the report or dashboard, add it as an attachment using an email application.

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