



2024

OTBI Guide



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V1

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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training team at learn@camptratech.com.

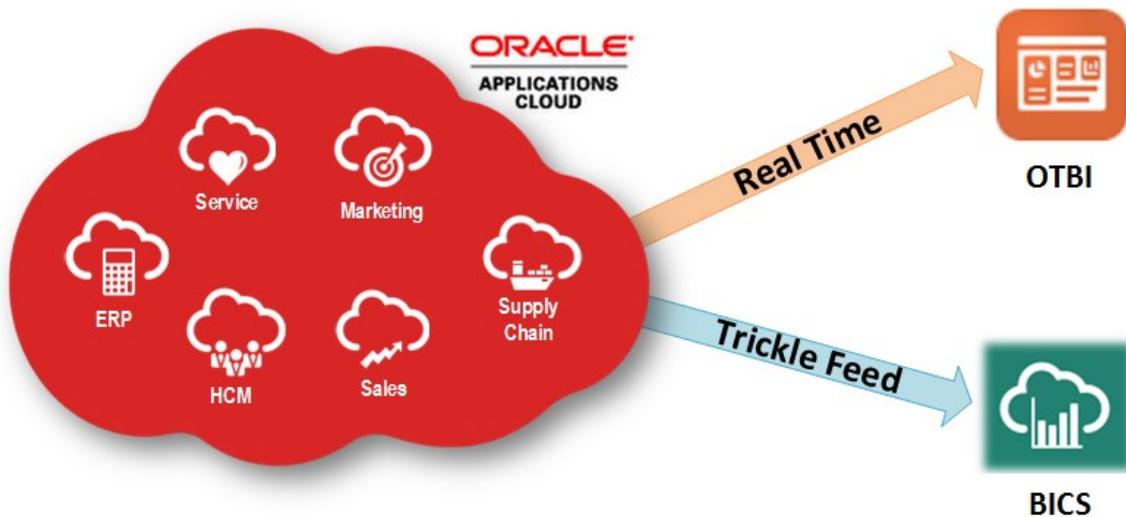
How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- ❖ Any fields with an asterisk are required fields.
- ❖ Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- ❖ You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for Report & Analysis creation.



Glossary of Terms

Here we've included common terms associated with Reports & Analysis. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Analysis

- ❖ A quick and easy query from one to two subject areas that can be built by a user and populates your organization's data.

Report

- ❖ A report can be created using SQL or using a data model to query data from multiple subject areas.

OTBI

- ❖ Oracle Transactional Business Intelligence is a reporting tool that delivers a flexible and easy-to-use analysis tool to view real time insight and tractional data. More complex reports can be created to pull data from multiple subject areas across the Oracle Cloud platform.

Catalog

- ❖ Location in OTBI where "My Folders" and "Shared Folders" are stored and contain Reports & Analysis for the organization.

Dashboard

- ❖ A collection of widgets on a single page, which provides quick access to multiple data analyses.

Subject Area

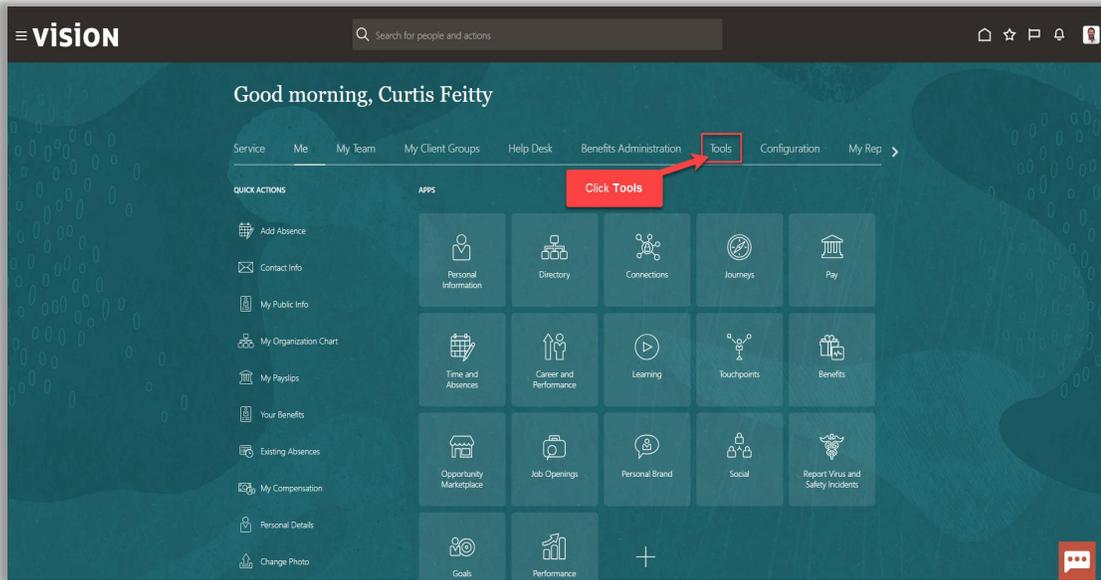
- ❖ A subject area includes the tasks that are associated with the tables, as well as the tasks required to load the tables.

Day to Day Operations Guide

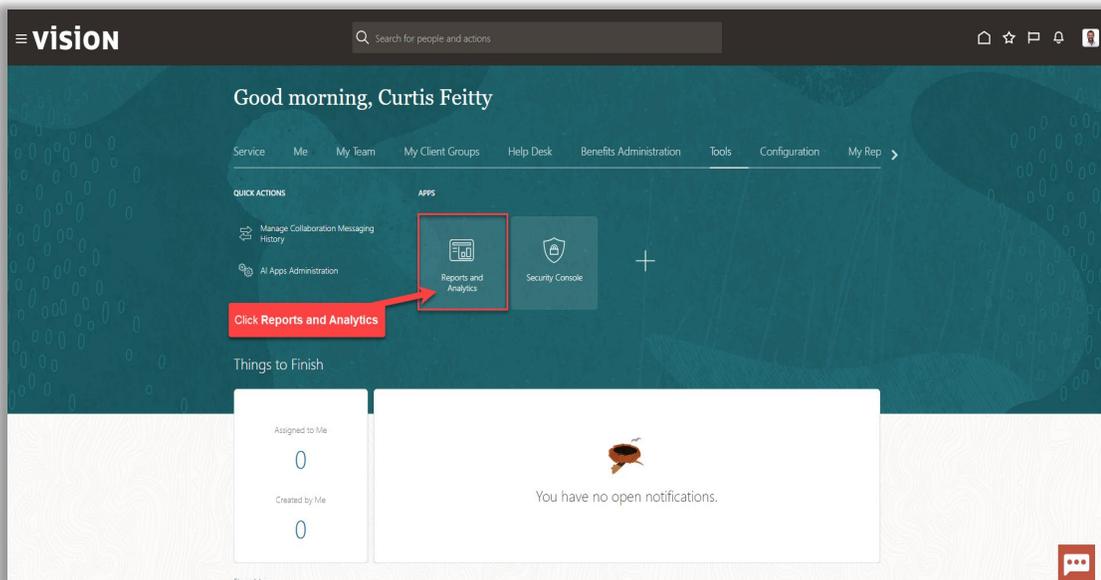
Navigation and Overview of OTBI

Navigation: Home>Tools>Reports and Analytics>Browse Catalog

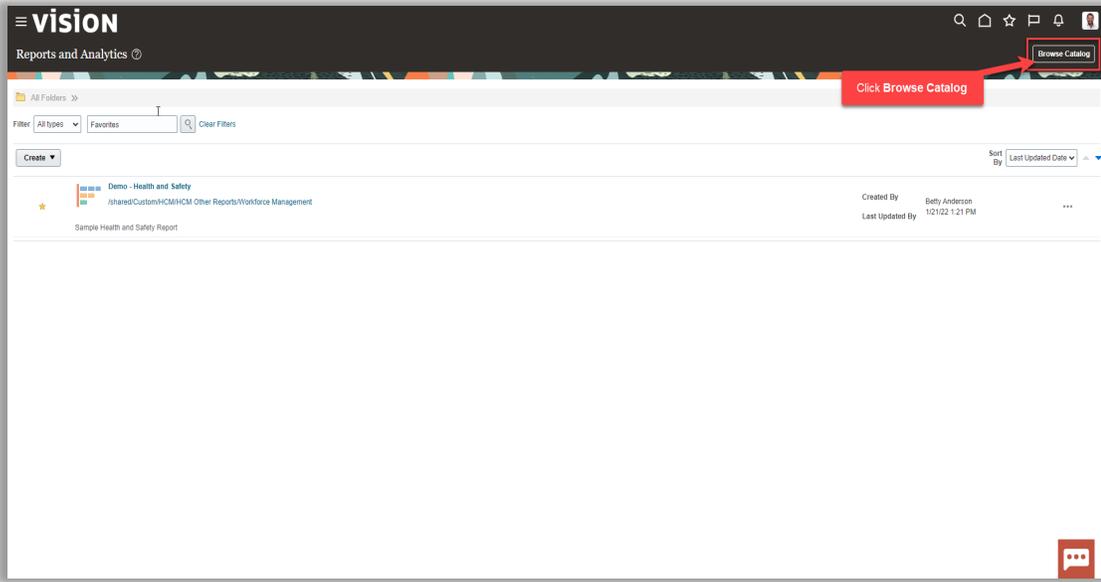
From the home screen, click **Tools**



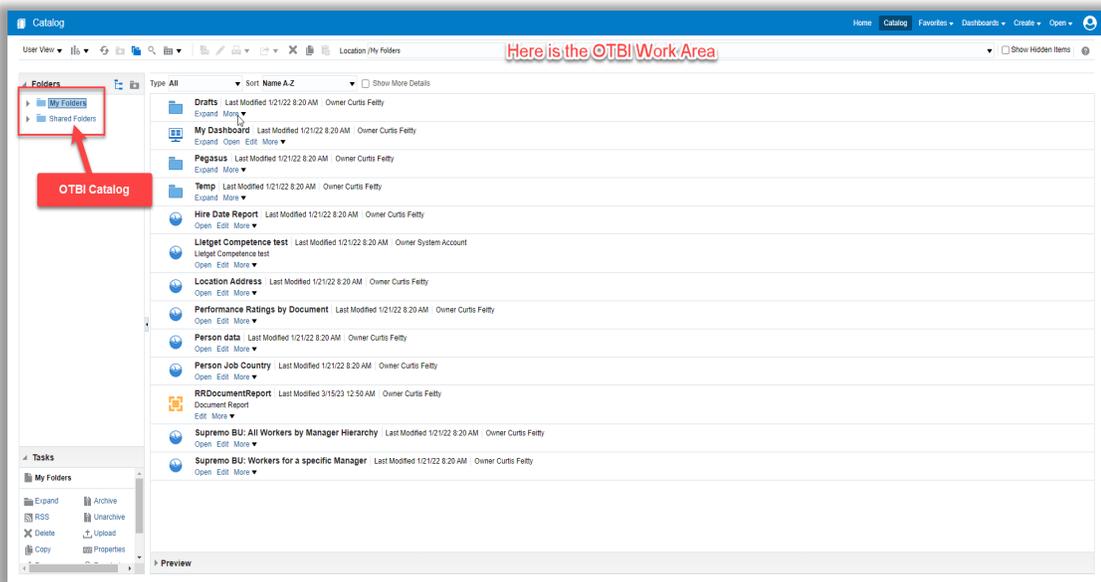
Next, click **Reports and Analytics**



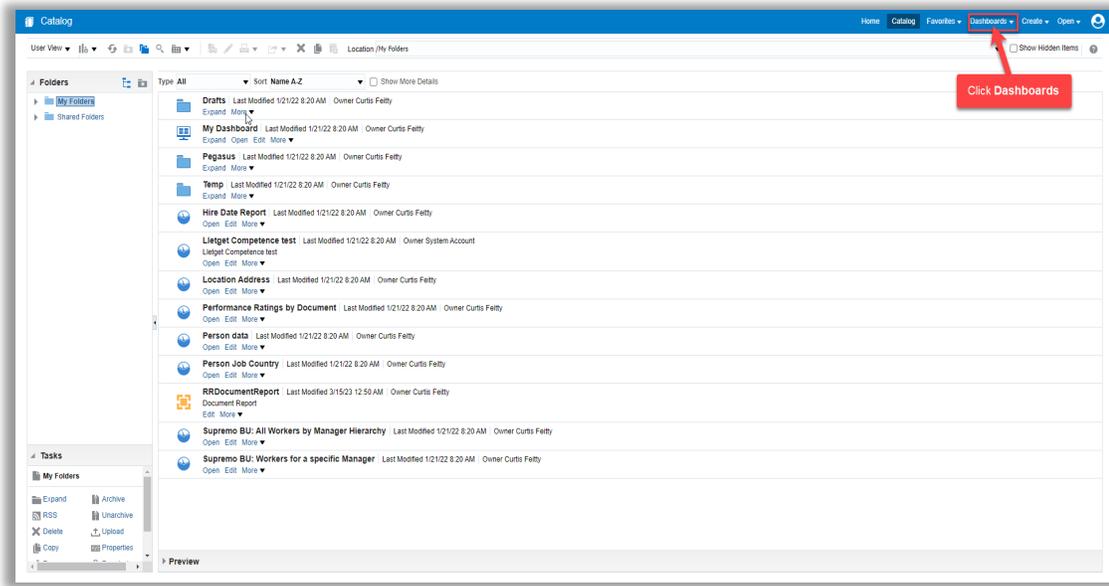
Next, click **Browse Catalog**



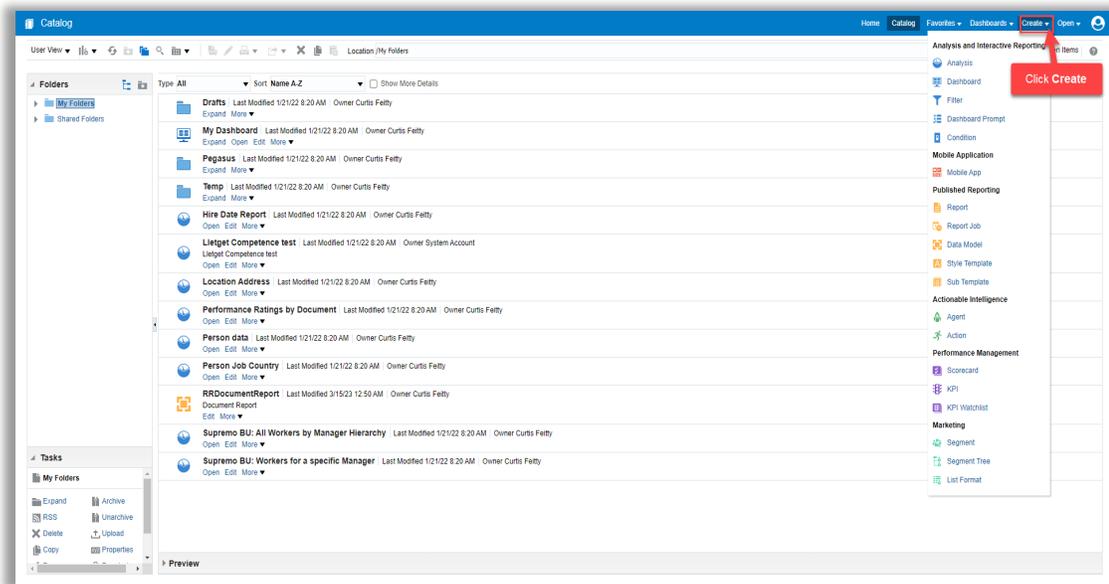
This is the OTBI Work Area. To the left is how we access the reports through the OTBI Catalog.



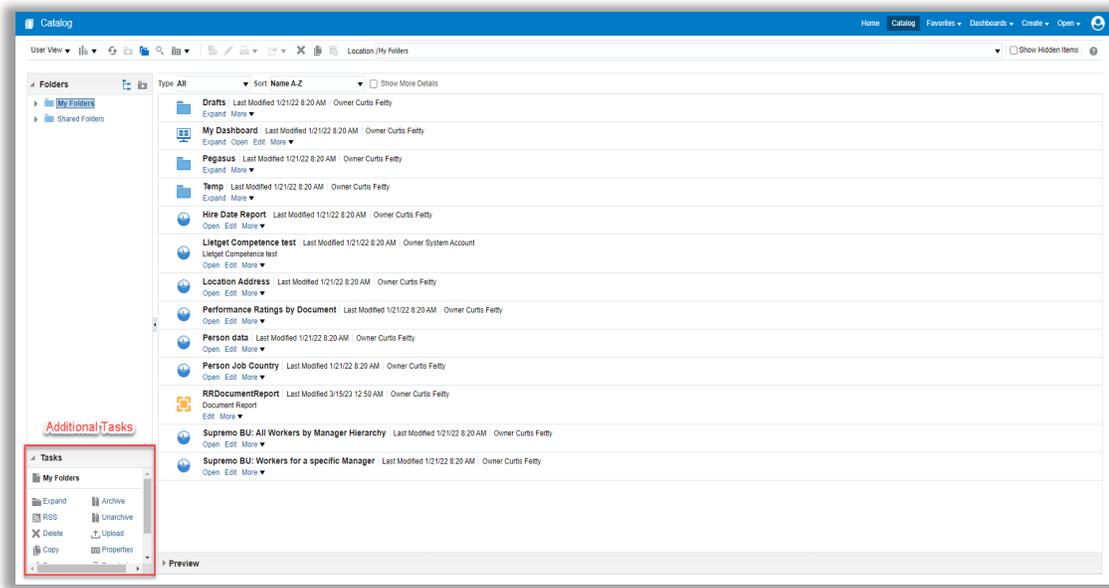
We can access **Dashboards** in the upper right corner of the OTBI work area by clicking the drop down



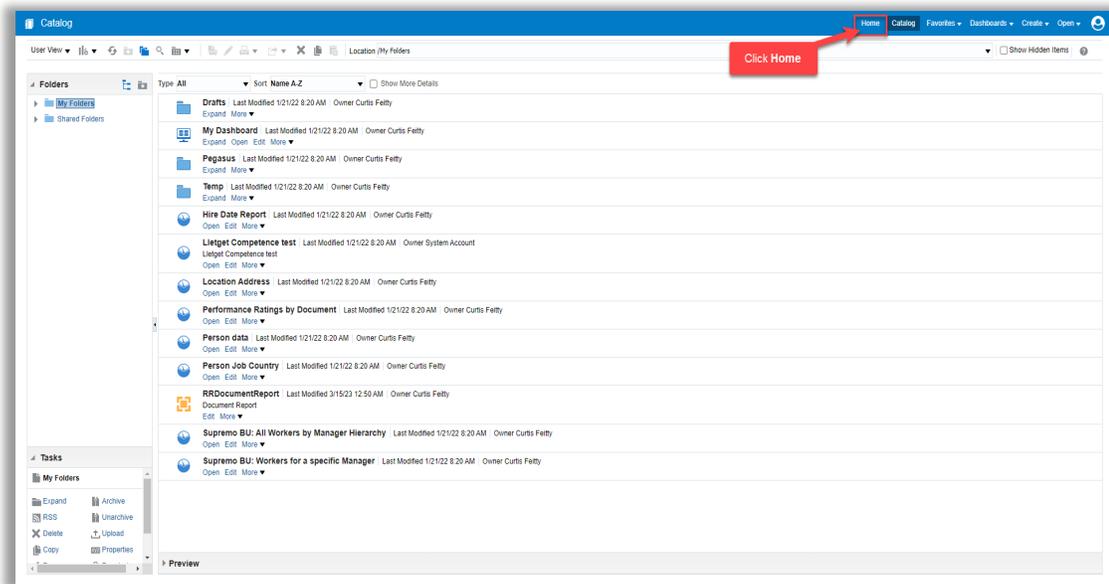
We can create a Report or an Analysis by clicking the drop down beside **Create**



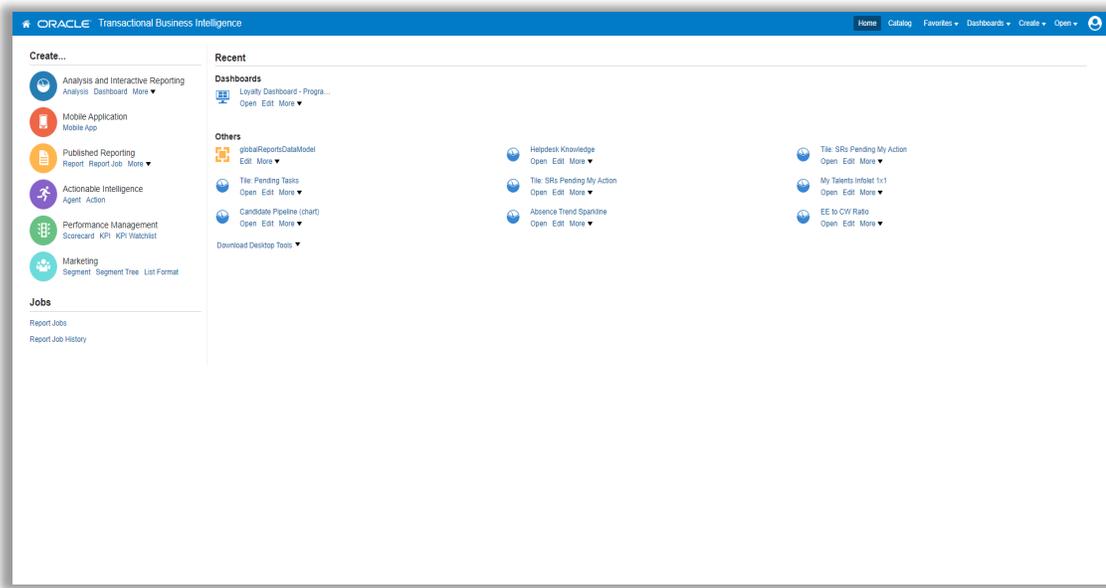
We can also perform other activities such as uploading a Report, etc. on the bottom left of the OTBI Work Area



If we click **Home**, we can access an overview of activity for OTBI



Here we can view our **Recent items**, **Create** a new item, and view our **Jobs History**. The **Jobs History** will show the processes that have ran as per a schedule as well as any file transfers such as Benefit File Carrier feeds

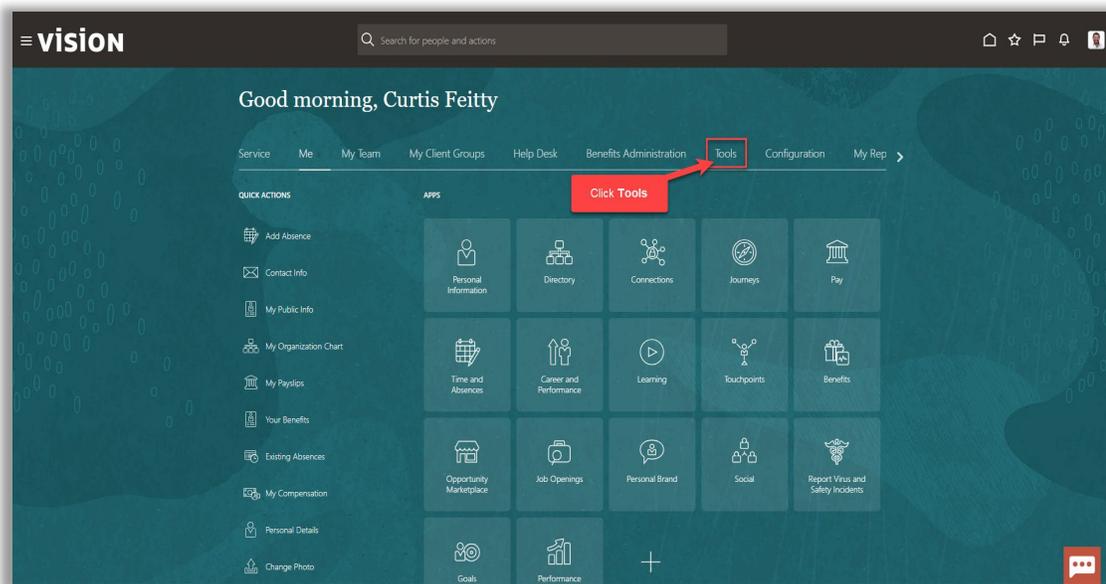


Next, we'll discuss how to view the Reports and Analytics area of OTBI.

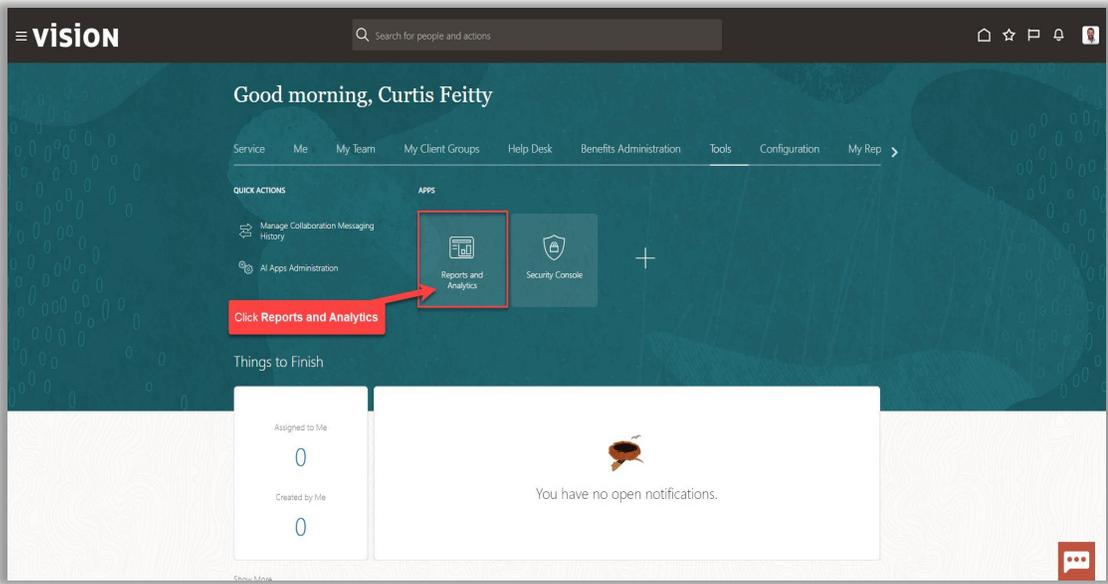
View Reports & Analysis

Navigation: Home>Tools>Reports and Analytics>Browse Catalog>Expand Shared Folder>Custom>Select Report or Analysis

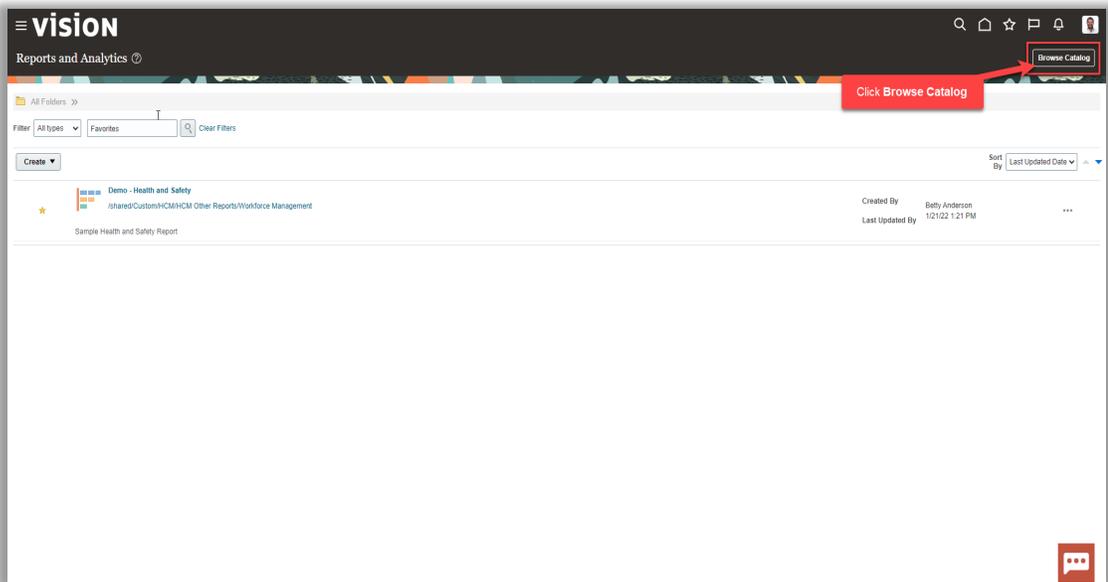
From the home screen, click **Tools**



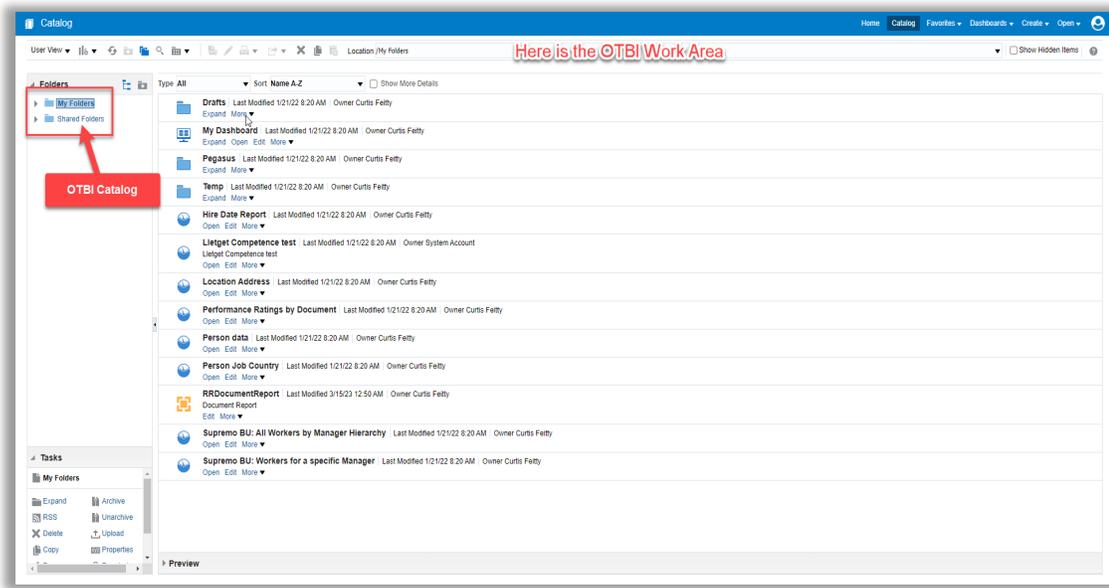
Next, click **Reports and Analytics**



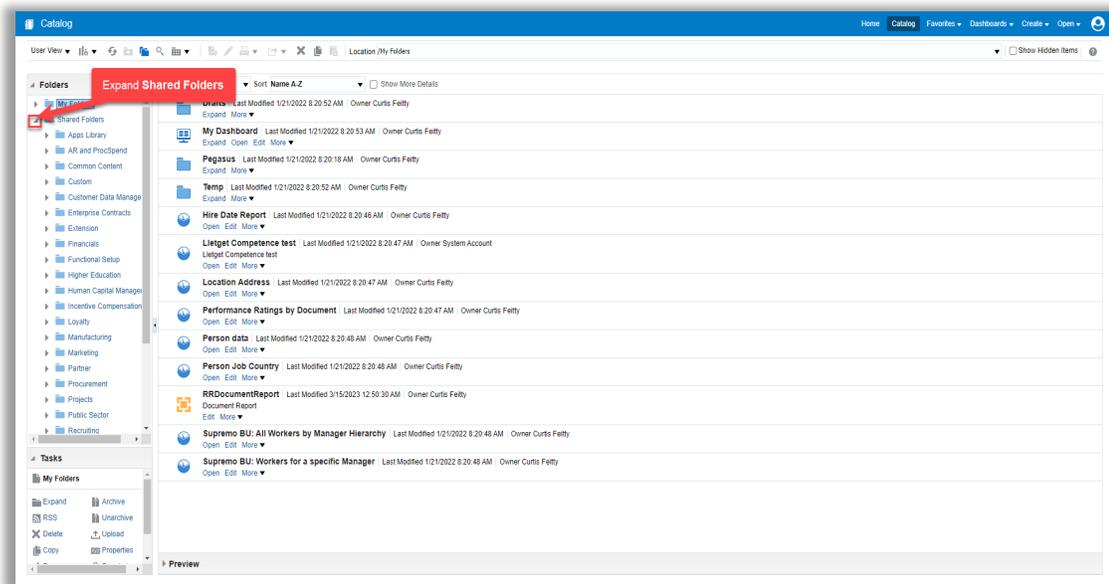
Next, click **Browse Catalog**



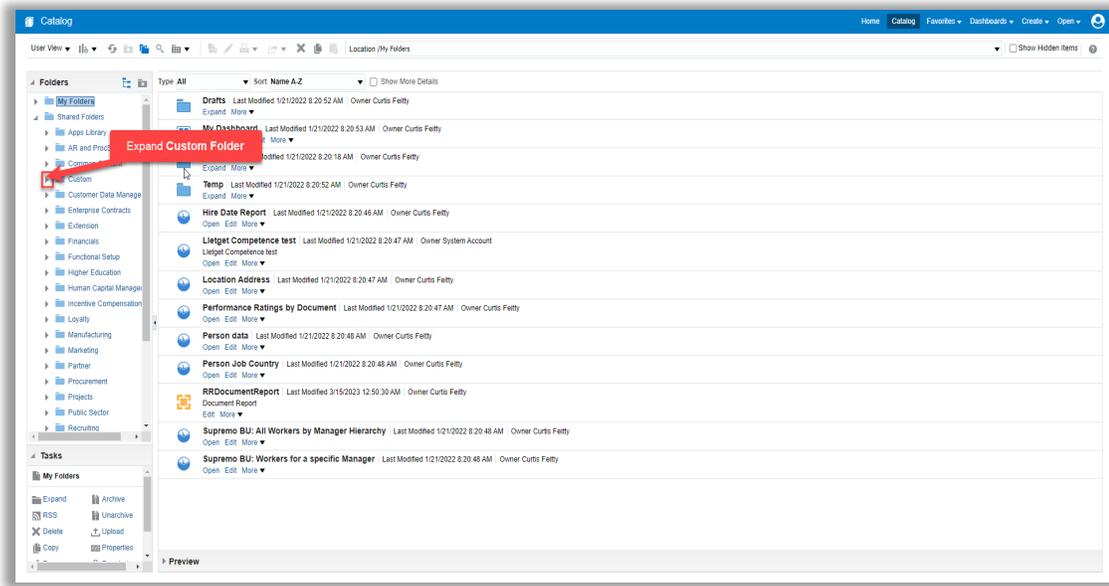
This is the OTBI Work Area. To the left is how we access the reports through the OTBI Catalog.



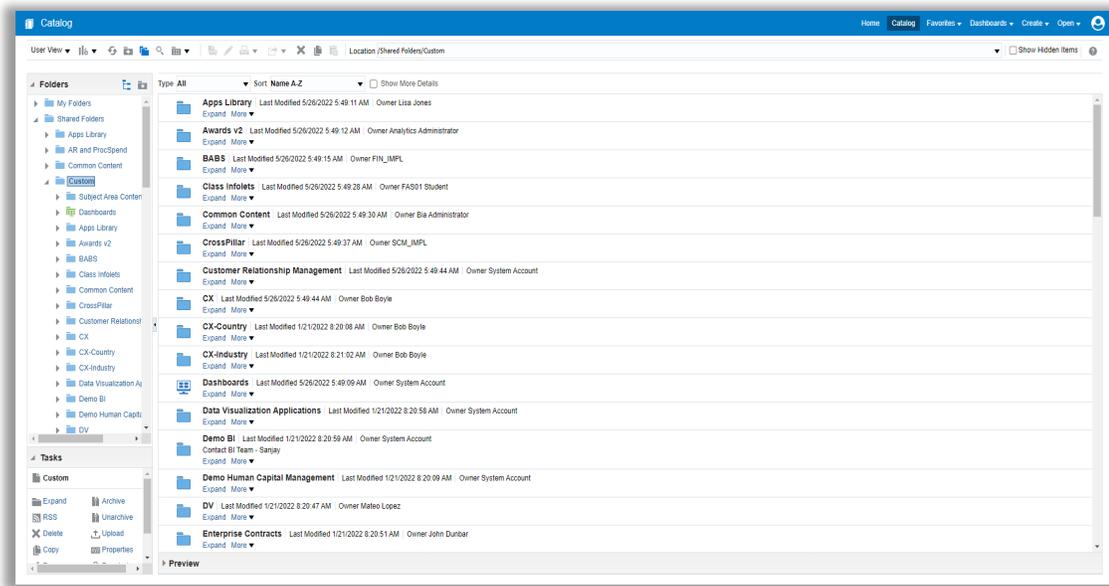
If we expand **My Folders**, we can view the reports associated with our user account. If we expand **Shared Folders**, we can view the Organization's reports. Expand **Shared Folders**



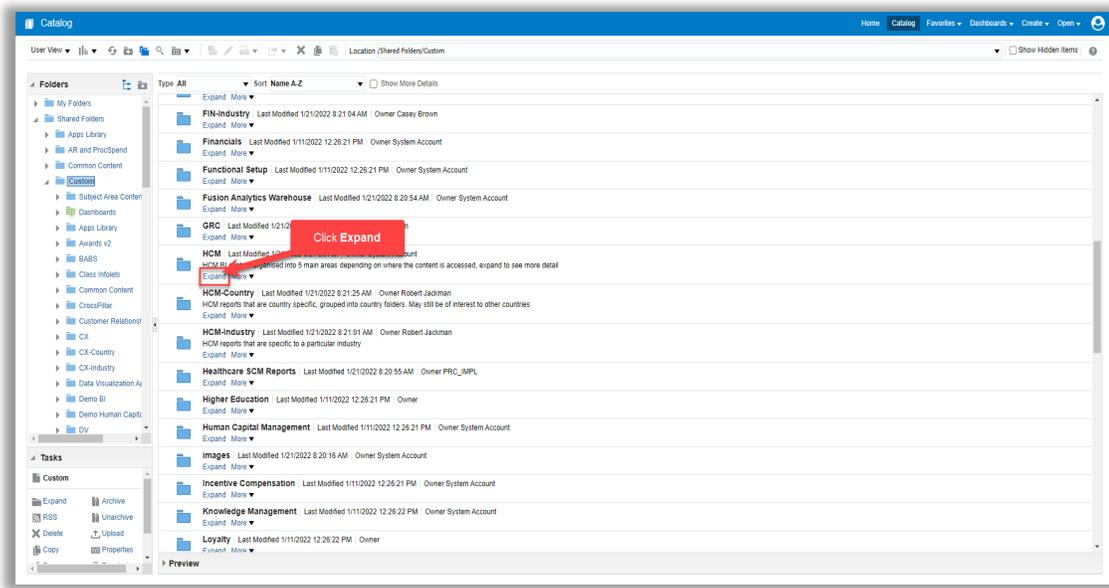
Here we can view the various folders that contain the Reports and Analysis for the organization. To view Reports and Analysis created by and for the organization, expand the **Custom** folder



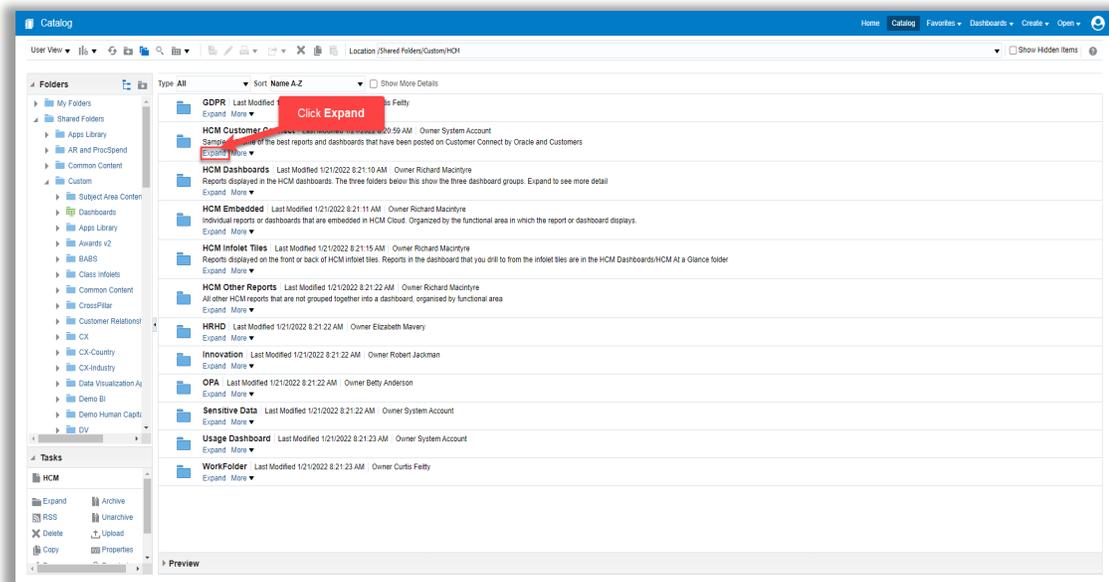
Here we can view the **Custom Reports** for the Organization



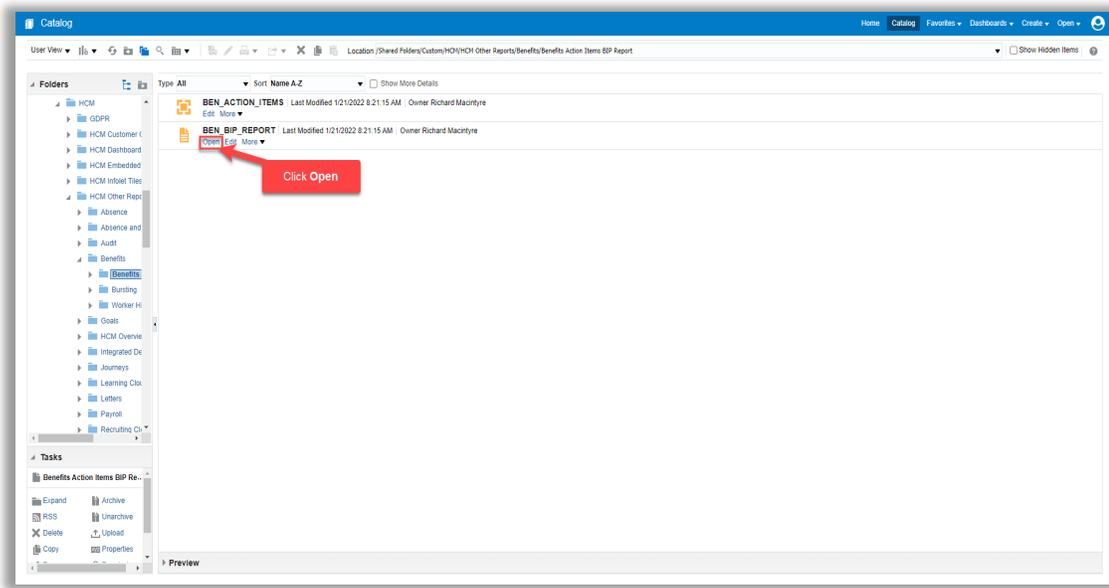
Click **Expand** to view the Reports and Analysis included in any folder



Click Expand in the subfolder



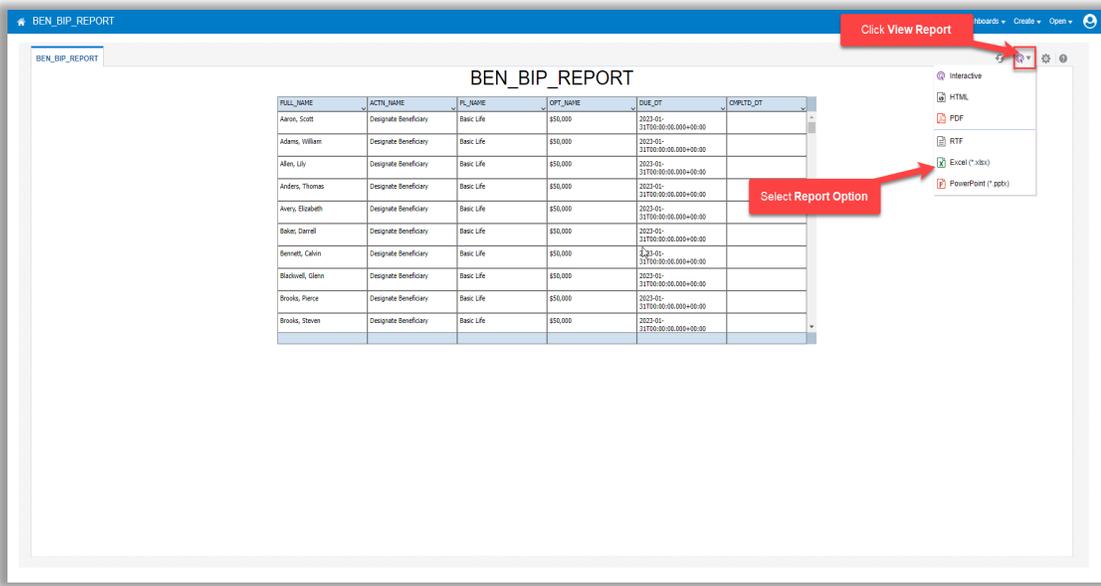
Click Open to view the Report Output



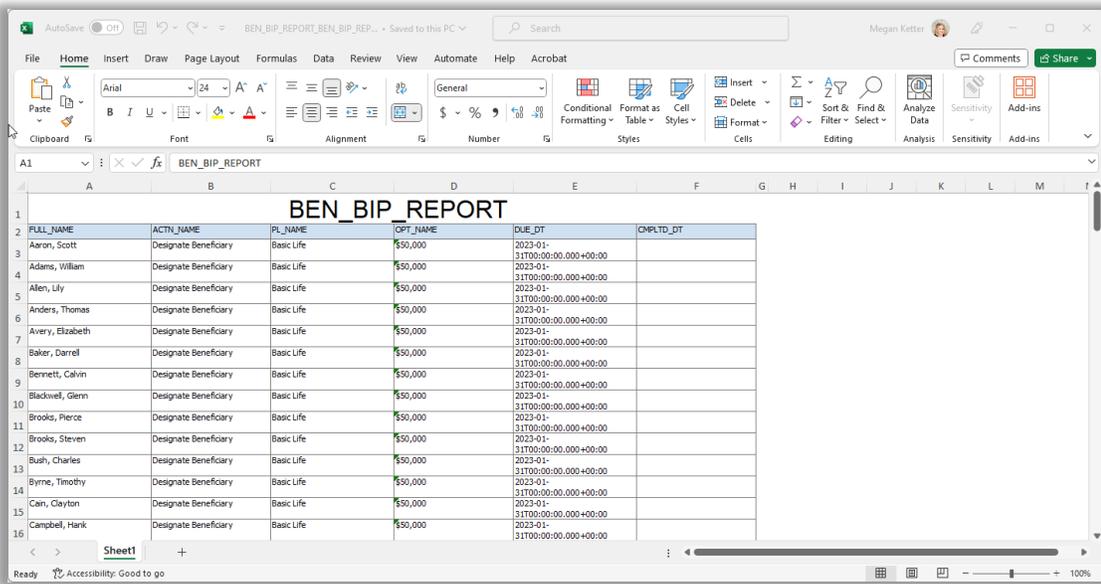
Now we can view the **Report Output**



Lastly, we can export the report. Click **View Report** and select the format in which we want the Report Data to be extracted



The Report will download to our system and can be opened, saved and shared



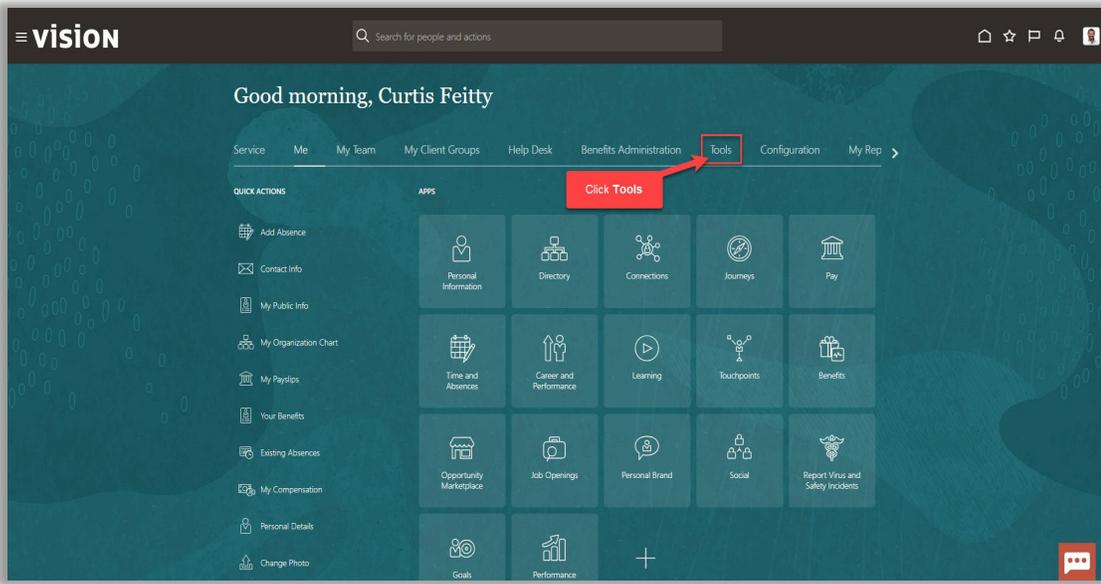
Next, we'll review how to create an Analysis.

Create Analysis

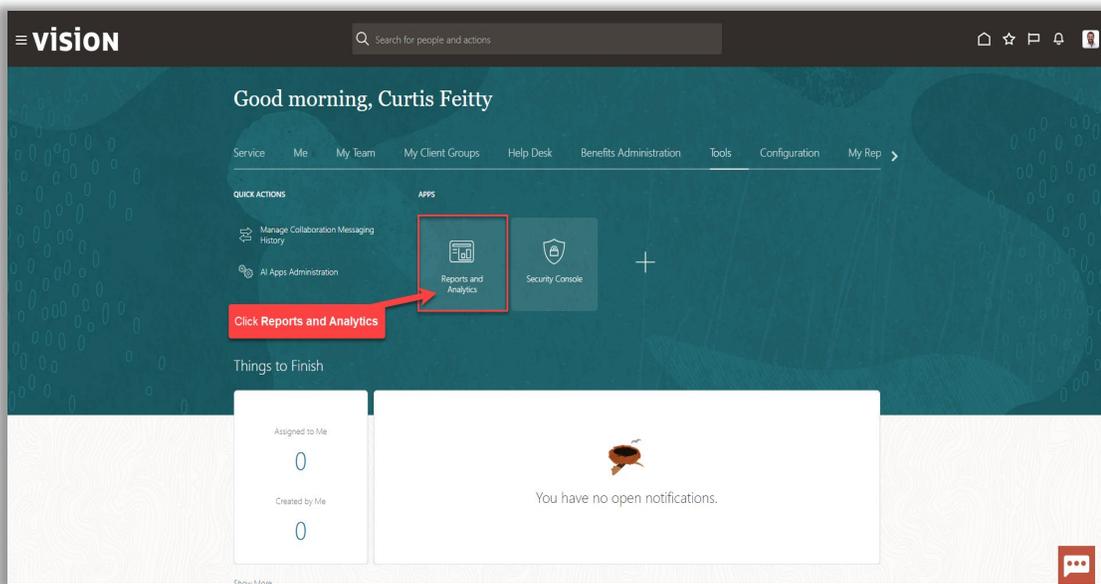
Navigation: Home>Tools>Reports and Analytics>Browse

Catalog>Create>Analysis>Select Subject Area>Add Columns>Save>Export This Analysis

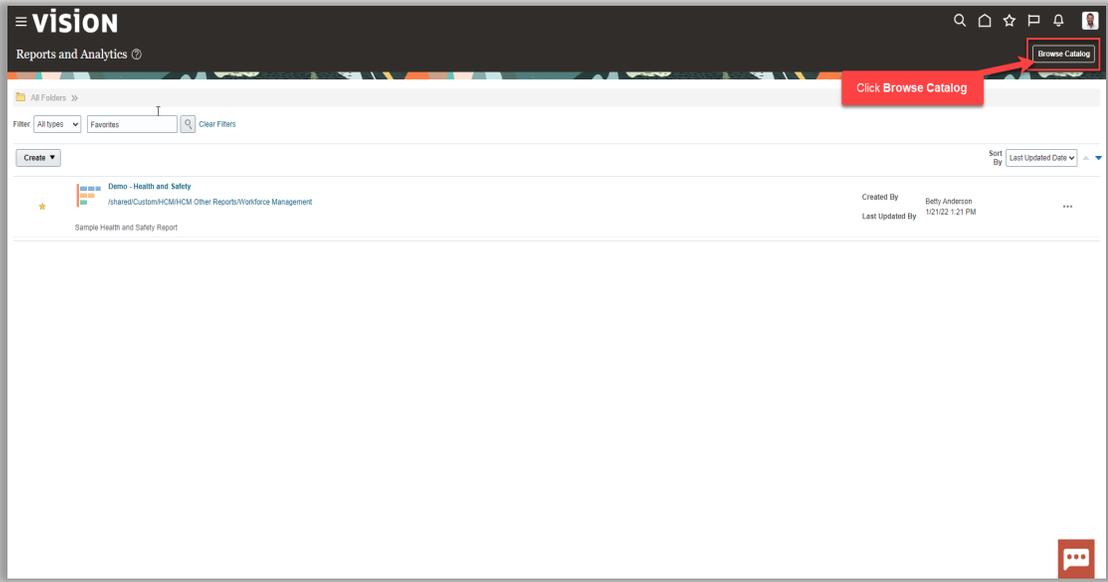
From the home screen, click **Tools**



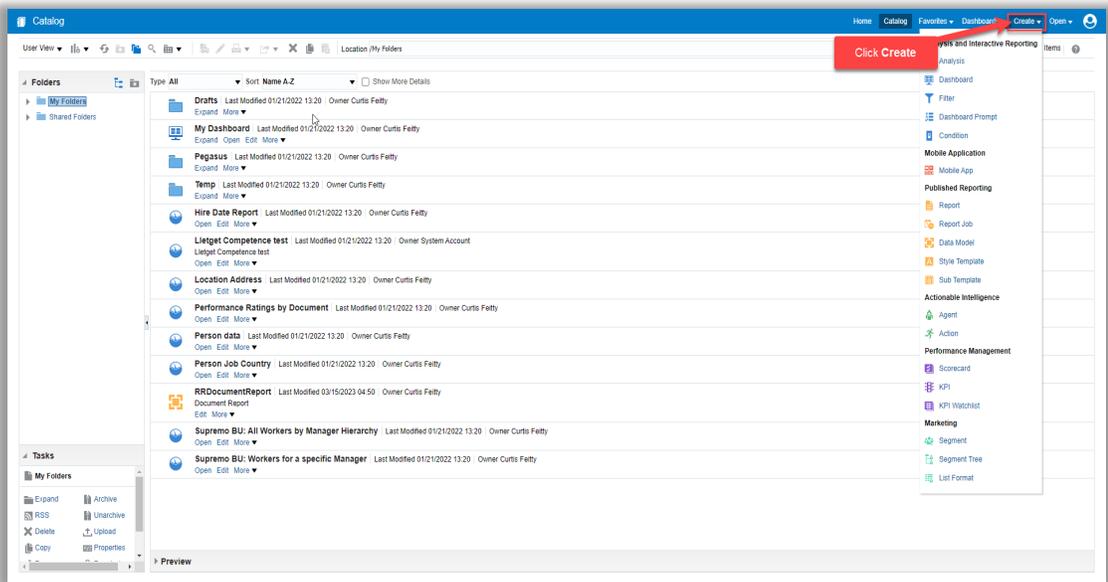
Next, click **Reports and Analytics**



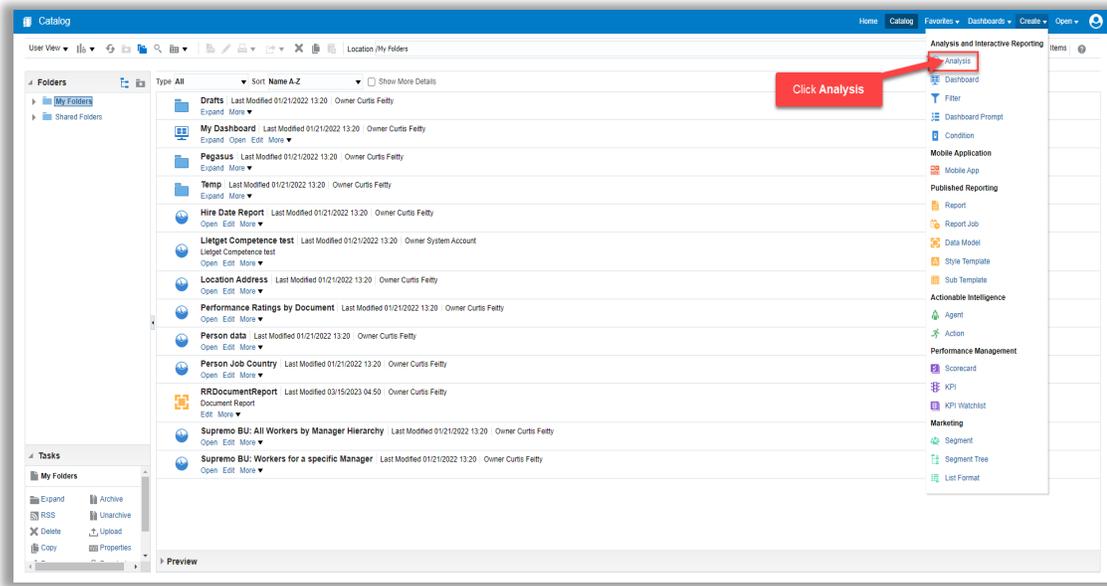
Next, click **Browse Catalog**



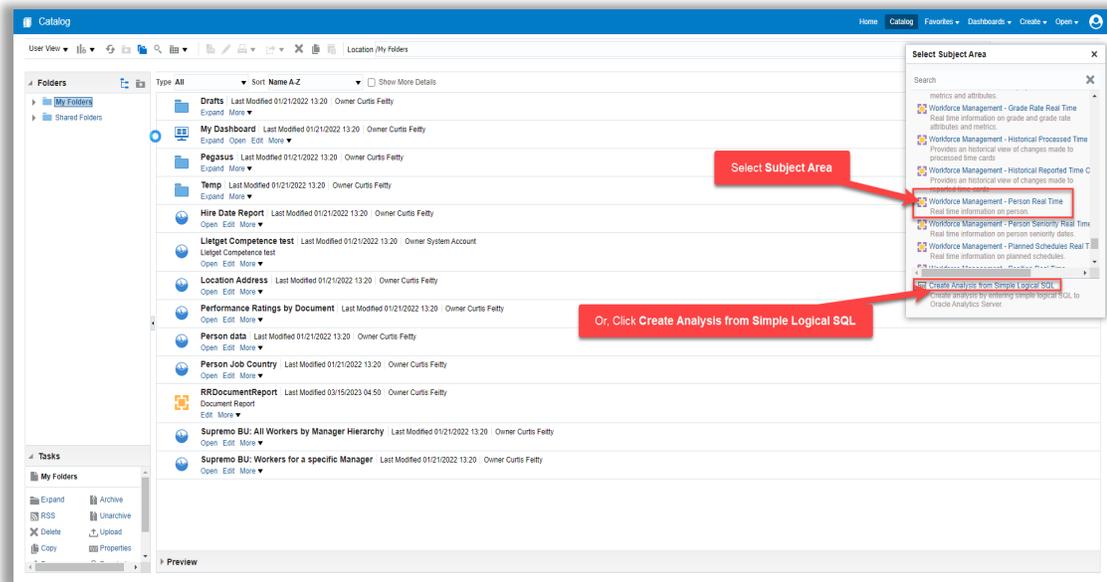
From the OTBI Work Area, click **Create**



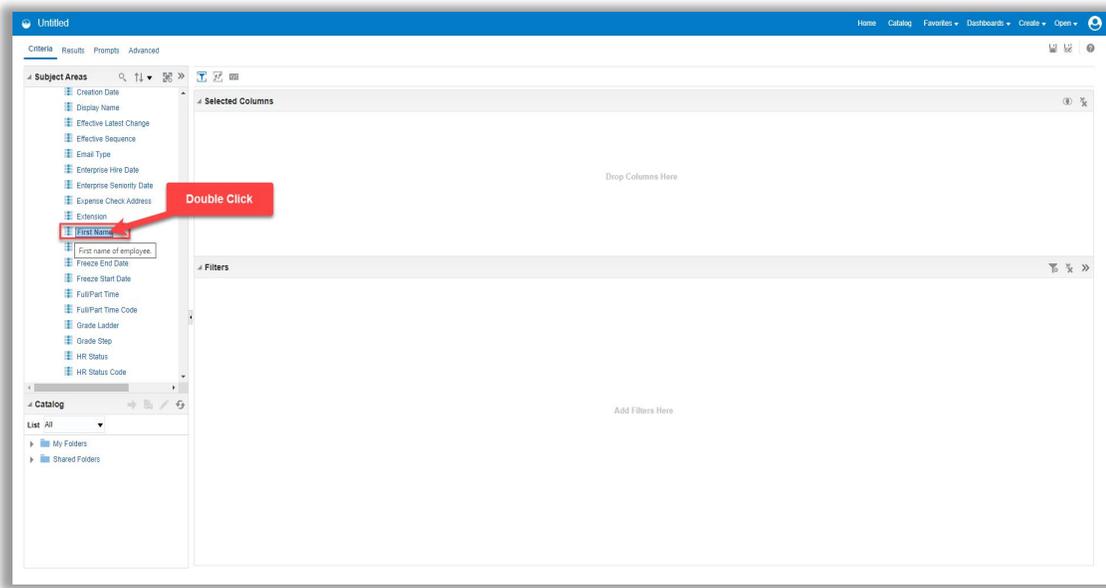
Click **Analysis**



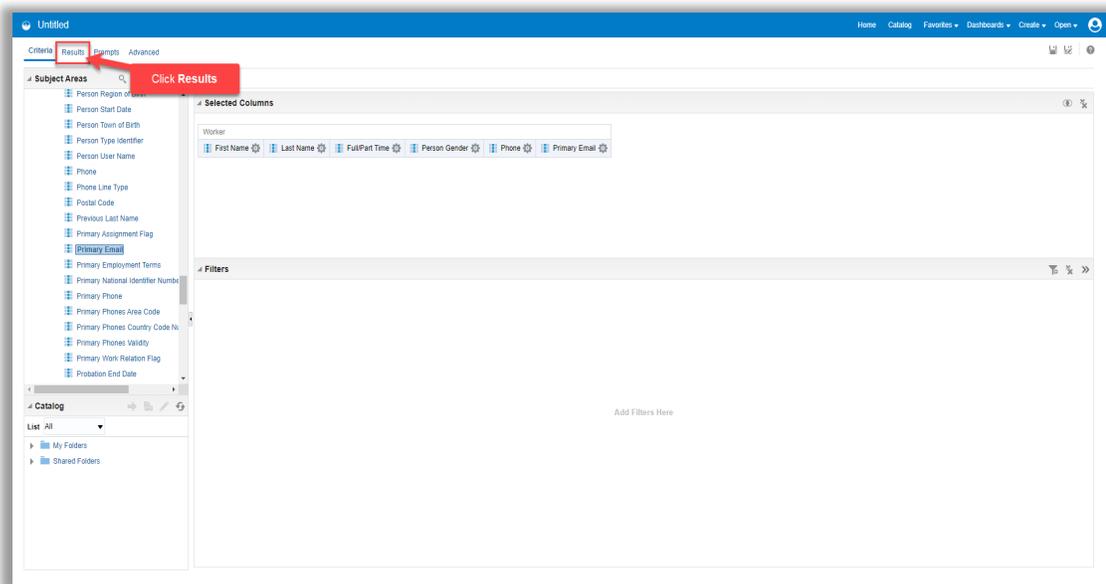
Next, we need to select the Subject Area in which we need to use to add the data or we can select **Create Analysis from Simple Logical SQL** to create an Analysis by using SQL. We'll select the **Subject Area**



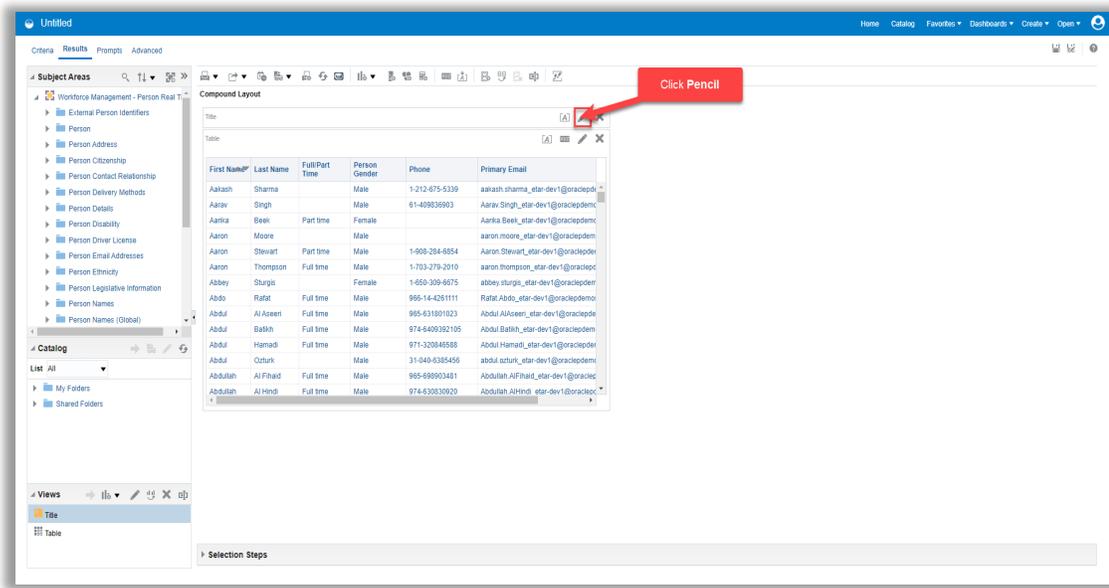
Next, we can expand the **Subject Areas** and add to the **Selected Columns**. To add, double click the **Field Name**. We can also hover over the field for a description



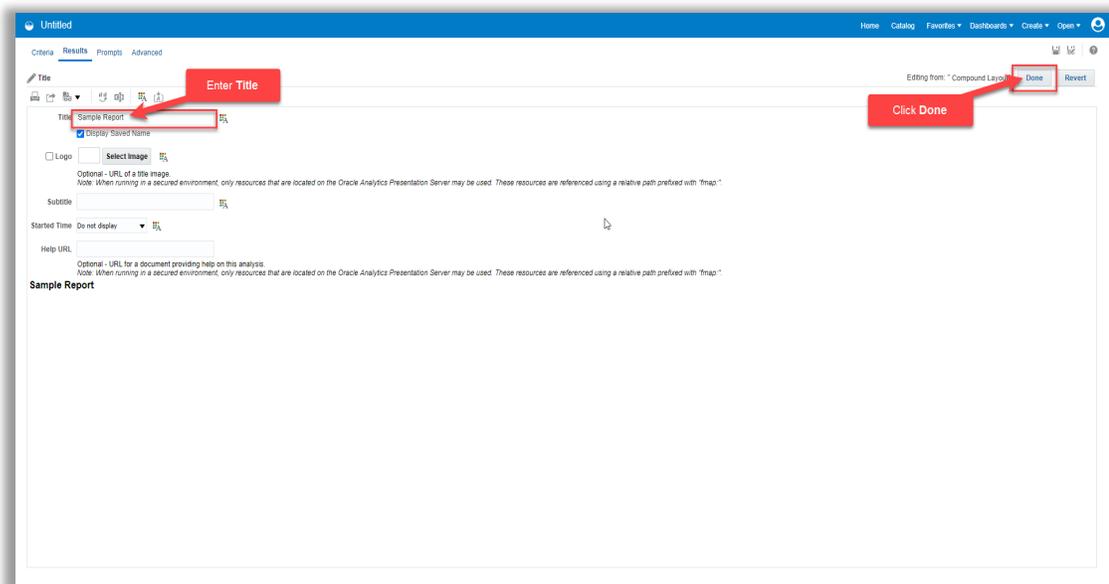
Follow this same process to add all the **Columns**. To view the results, click the **Results Tab**



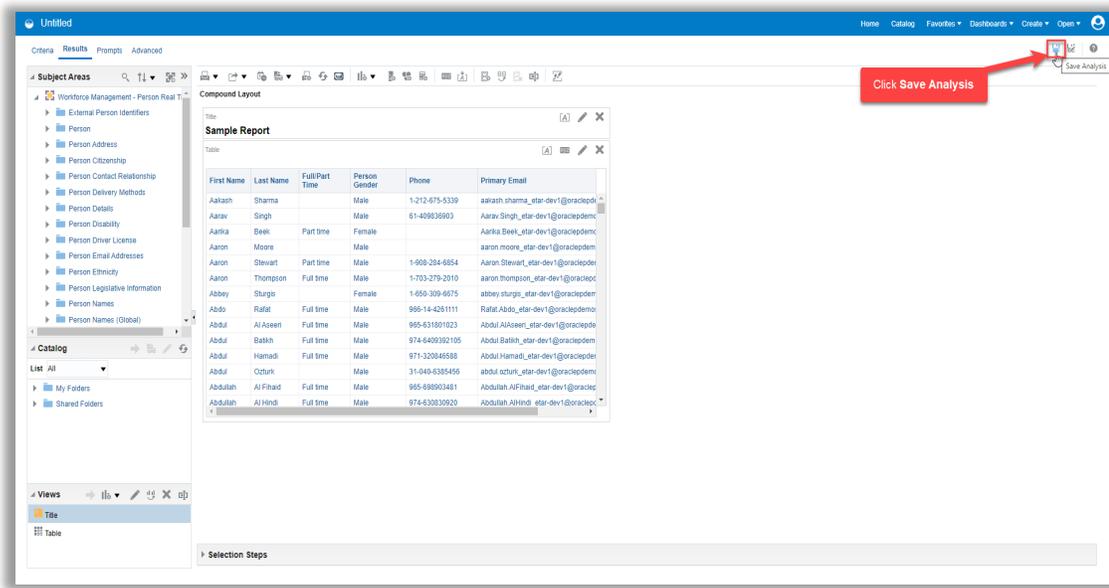
Here we can view our **Analysis** results. Next, enter the **Title** of the Analysis by clicking the **Pencil**



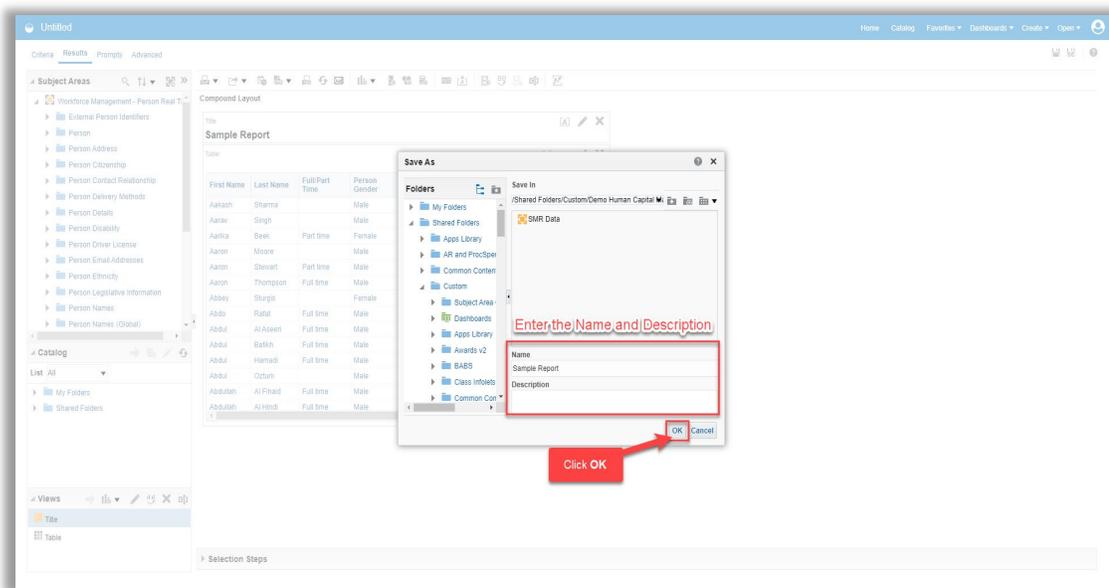
Enter the Tile and click Done



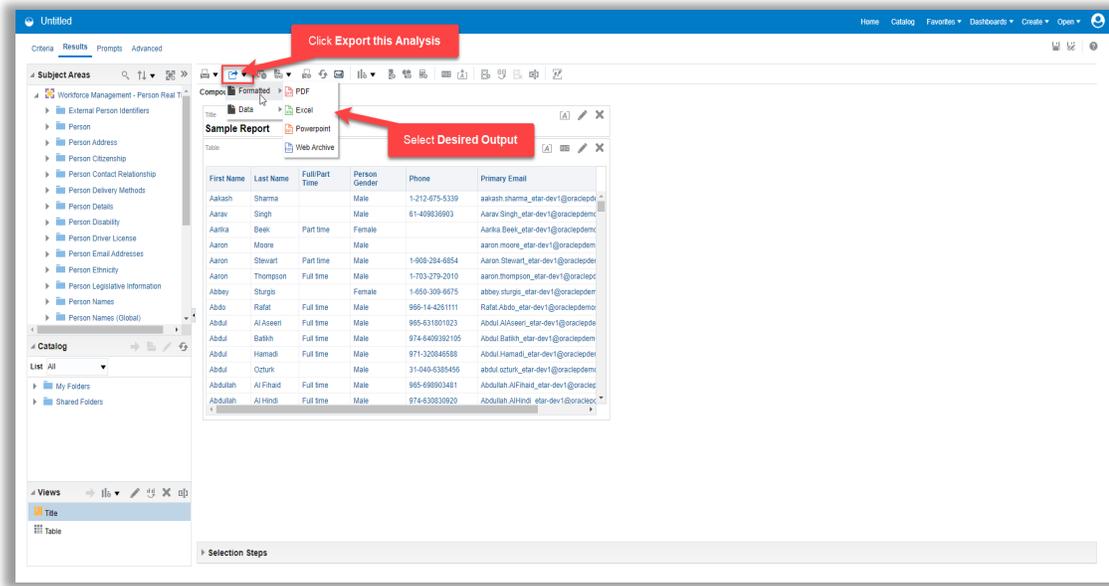
Next, if we want to save the Analysis for future use, click **Save Analysis**



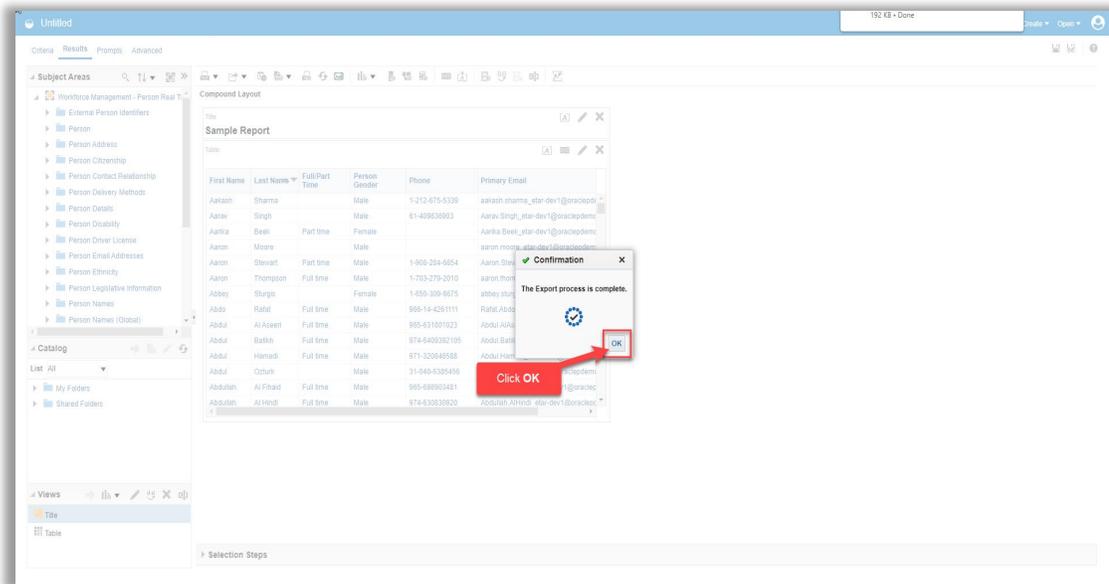
Designate where we would like to save this Analysis. If we want to keep this report private, we can save under **My Folders**. If we want to share this report with the organization, save under **Shared Folders**>**Custom** then pick the applicable folder. Enter the **Name** and **Description** and click **OK**



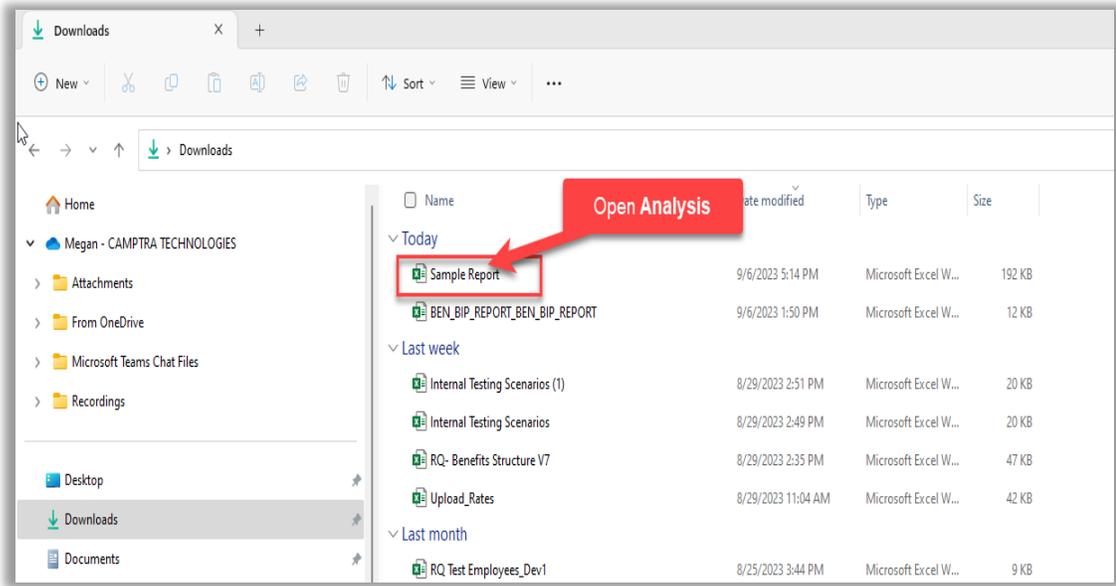
Lastly, click **Export this Analysis** and choose the output preference



Click OK



We can access the report in the **Downloads** file on our pc



Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version	Revision	Author	Changes
Version 1.0	Date	Megan Ketter	Initial Version