OSFA Conference 2021

Oracle Business Intelligence Enterprise Edition (OBIEE)

Agenda

- Overview of OBIEE
- Updates and reminders
- Access to OBIEE
- Recreating Hyperion queries
- Analysis discussion
- Pivot view
- Formula help
- Best Practices and Helpful Info

Overview of OBIEE

- Why OBIEE?
  - Oracle gave Hyperion: End of life (no longer supported)
  - Oracle ULA – Hyperion desktop Licensing ends - ***6/30/22***

- OBIEE - also known as OB1

- Web based
  - OB1 Production site: https://obi.das.oregon.gov:9503/analytics/
  - State Network (Big IP)

- New Security
  - Shared Active Directory (Shared AD)
    - Agency ARS (Active Roles Server) admin team works with DAS DCS to setup
  - Sync vs Non-Sync: Website document
  - Non-sync uses OB1 password manager site (Resets: ARS admin)

Updates and reminders

- DAS Datamart has not changed

- Test environment - only for admin

- Internal databases – Not allowed with OB1
  - Management decision
  - Security risks

- iLearn OBIEE Training
  - Required – Take as soon as receive security access
  - Added Word document to website training section
  - iLearn conversion to 'Workday training' – 6/30/21
  - Working on additional training

Access to OB1: Security

- Agency Security Officer
  - SARS System Security – OB1 access setup
- View Access
  - Admin – 1 or 2 per agency
  - Author – 99%
  - Consumer – minimal users
- SFMS & OSPS Users
  - Subject Area view
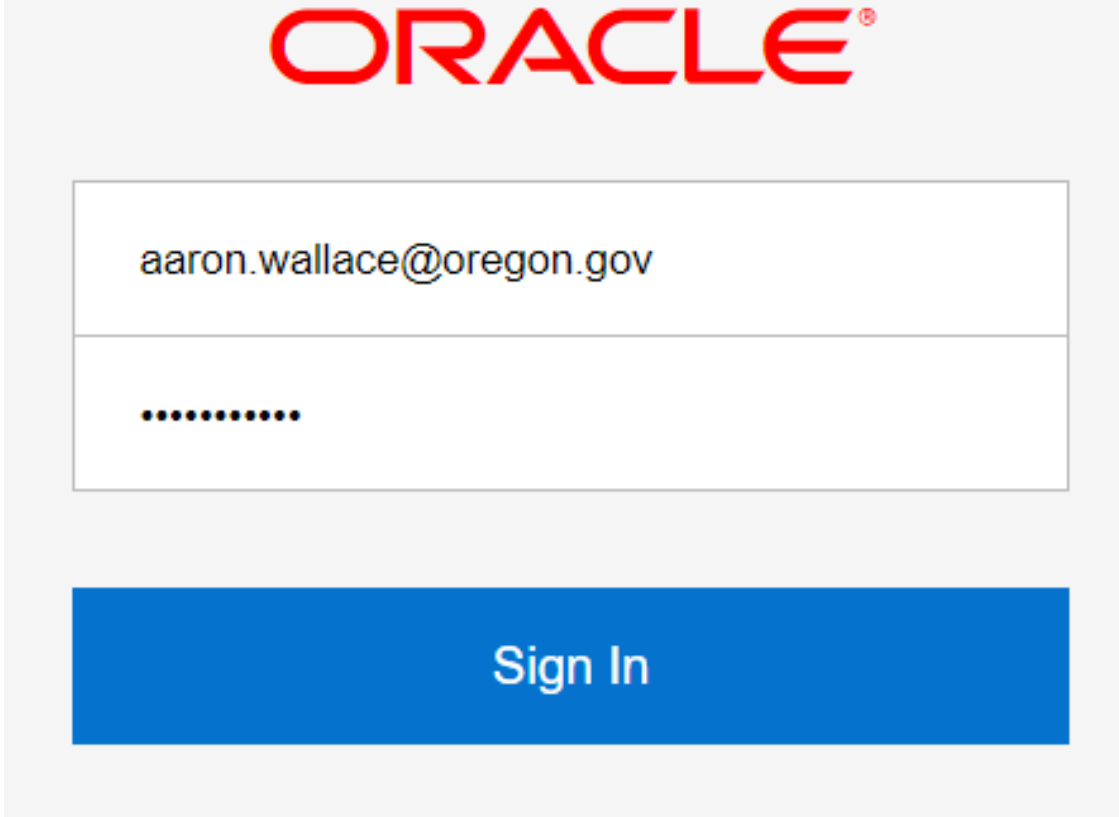 - OSPS - Agency Level Security

Access to OB1: Logging In

- Production site:

https://obi.das.oregon.gov:9503/analytics/

- User ID:
  - Email Name + @Oregon.gov

  - Email Name + _SS@Oregon.gov

- Credentials error – Agy Domain

Recreating Hyperion Queries: OB1 - Home Page

Recreating Hyperion Queries: Helpful Tips

- When recreating a Hyperion query in OB1, find the 'Financial' table in your Hyperion query and use that subject area.

- Subject area are already setup with profile tables.
    - Do not use 'add/remove subject areas' function
    - Provide a work request to DM Support

- Name change in OB1 (only):
    - OSPS Subject Area
        - DM Table: "JS Lab Adj" = "OSPS – Labor and GPA" (Gross Pay Adjustments)
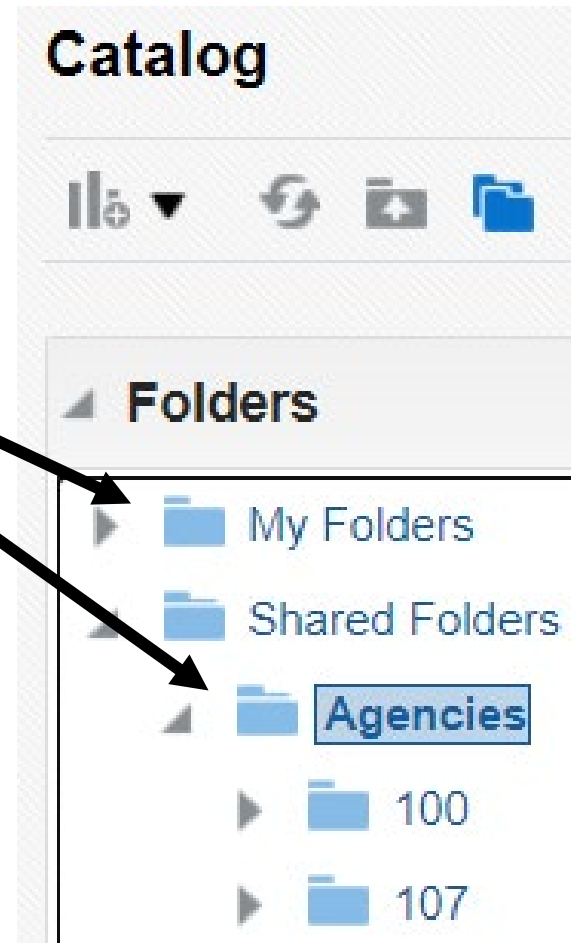
Analysis discussion: Order

- Select Subject Area
  - Financial, Profile and Calculated Fields folders

- Select Fields (Sort as necessary)
  - Double click, Shift click or Ctrl click
  - Profile table fields match RSTARS screen.
  - Ruler icon = true number

- Add Filters (multiple):
  - Agency and Date - always first
  - Multiple values – use a semi-colon – "**;**"
    - Hyperion used a comma.

- Hyperion filter 'not begin with'
  - Use "Is not like (pattern match)" operator function.
  - "%" and "_" work with filters

Edit Filter

Column	Fiscal Year
Operator	is equal to / is in
Value	2020;2021

Analysis discussion: Tips

- Sort in the Criteria section
  - ‣ Results section override

- Save – ('My folder' or 'Shared')
  - ‣ Add narrative text
  - ‣ Agy Admin create subfolders
  - ‣ Reference personal file

- OB1 features
  - ‣ Auto sum - Less rows
  - ‣ 1 million rows

- Results tab
  - ‣ Double check
  - ‣ Compound Layout
    - ■ Title and Table views
  - ‣ CL name change

Catalog

Folders

- My Folders
- Shared Folders
  - Agencies
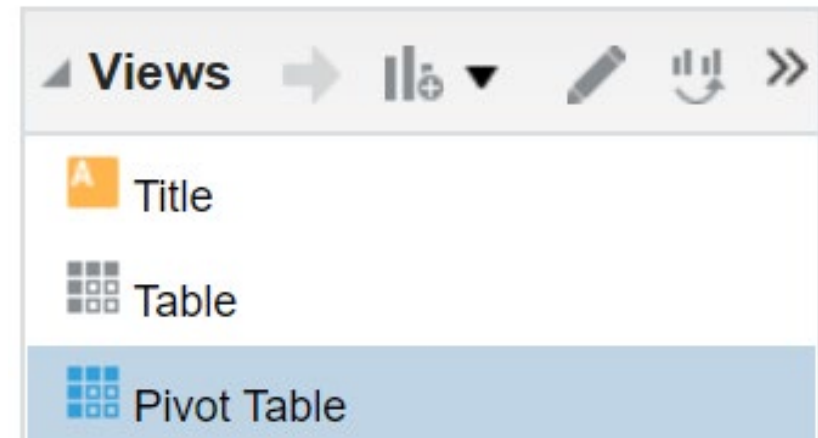   - 100
    - 107

Analysis discussion: Refresh

- OBIEE 'Auto refresh' feature
  - Occurs: Open Analysis, create views, and edit (Tables, Pivots, etc)

  - Concern statewide due to varying wait time.

  - Bringing on Contractor.

  - Initial Analysis build:
    - Use a small agency (ex. 108) to filter.
    - Filter the 'Criteria' section as much as possible.

Pivot View: Creation

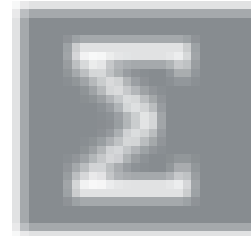- Add new view
  - Recommended – Pivot table
  - New Compound Layout (CL)

- Views section
  - Edit, Duplicate, Rename
  - Deleted view

- Move views into CL

Pivot View: edit

- Layout editing
  - ▸ Columns, Measures & Rows
  - ▸ Totals & Properties
  - ▸ Sections and Prompts
  - ▸ Hidden vs Exclude
  - ▸ Field Duplication

- Options: Done or Revert
  - ▸ Revise

Formula Help: Start

- Formula creation start:
  - Input field from the 'Criteria' section of an Analysis.
  - Add any subject area field.
  - Use wheel icon to edit.
  - Update the 'folder' and 'column' heading names
    - Must be different than other fields.
  - Update the formula area.

- Use the "*f*(...)" formula help function.
  - Adds various formula aspects.
  - Gives definitions of the formula.

Formula Help: Hints

- Set Aggregation Rule
  - Sum for number
  - Not needed for text field

- You must include <u>all</u> fields that are related to a formula in the criteria section. You are able to hide the fields from view within the Results section, if desired.

- If you receive an error message when creating a formula
  - Very technical message.
  - Recommend - save prior to selecting 'Results' tab.
  - Best current option: 'trial and error'.

Formula Help: Continued

- When creating a formula and you want the program to recognize a value as a true number, don't use quotes. If you use quotes, then it recognizes it as a text field. Ex. '0' compared to 0.

- If using a formula as a filter
  - Displays as full formula
  - Does not reference field name

- Common formula symbols: % and _

- OB1 uses 'CASE' statements; Hyperion uses 'If/then'.
  - Most used formula (between, groups, not equal)

Formula help: Case Statement Examples

- Hyperion: If (Gl_Acct == '3500') {M13_Balance_Gl} else {0}

- OB1: CASE WHEN "GL Detail"."Gl Acct" = '3500' THEN "GL Detail"."M13 Balance Gl" ELSE 0 END

- Hyperion (not equal): If (Fiscal_Year == 2020 && Appn_Year != 2021) {'Y'} else {'N'}

- OB1: CASE WHEN "GL Detail"."Fiscal Year" = 2020 AND "GL Detail"."Appn Year" != 2021 THEN 'Y' ELSE 'N' END

Formula help: Case Statements continued

- <u>Hyperion (between statement)</u>: if (Gl_Acct >= 3500 && Gl_Acct <= 3600) {'Y'} else {'N'}

  <u>OB1</u>: CASE WHEN "GL Detail"."Gl Acct" >= '3500' AND "GL Detail"."Gl Acct" <= '3600' THEN 'Y' ELSE 'N' END

- <u>Hyperion (Grouping)</u>: if (Gl_Acct == 3500) {'Expense'} else if (Gl_Acct == 3100) {'Revenue'} else {'None'}

- <u>OB1</u>: CASE WHEN "GL Detail"."Gl Acct" = '3500' THEN 'Expense' WHEN "GL Detail"."Gl Acct" = '3100' THEN 'Revenue' ELSE 'NONE' END

Formula help

- New Formula document
  - Various Hyperion to OB1 examples

- You can use formula as a filter
  - Full formula displayed

- When referencing another formula field
  - Full formula is included.

- Save a formula
  - Use the 'save column as' feature within a criteria section.
  - Add to another Analysis
  - Formula is linked
  - If sharing file with another user; must have permission

Best Practices and helpful information

- All files are saved to the DAS OB1 server.
  - Admin's create folders
  - Shared folder benefits (Audits, coworkers, etc.)
  - Data is backed up

- Export data to CSV (not Excel – known issue).

- There is a new OB1 Repository
  - SARS creating DAFR6610 & 6620 and SEFA

- OSFA presentation posted to website

Q & A