

Dashboard Reports Quick Reference

Topic	Details
<p>Accessing Dashboard Reports</p>	<p>To access Dashboard Reports:</p> <ul style="list-style-type: none"> • Log on to MyUNiverse • Click the Reporting tab • Click Oracle Business Intelligence 
<p>My Dashboard <i>Where you VIEW reports</i></p>	<p>By default, the system opens to “My Dashboard”. This is where you can customize your view of reports you use most often.</p> <p>To customize My Dashboard:</p> <ul style="list-style-type: none"> • The first time you customize your My Dashboard it will show an empty dashboard with a link to “Click here to add content”.  <ul style="list-style-type: none"> • Anytime you wish to update your My Dashboard after that, click the Options button and select Edit Dashboard. • Drag reports from your Saved Content (My Folders or Shared Folders) and drop onto the area on the right (the bar turns dark blue indicating you may drop the report (click to drop). This will create a “section”. Each new report you add will have its own section. Multiple reports can be put in a single section. • Click the Save button in the upper right

Topic	Details
<p>Answers <i>Where you create reports</i></p>	<p>Answers allows you to create new reports. You can create a report from scratch or use an existing report to customize and save as your own.</p> <p>To create a new report:</p> <ul style="list-style-type: none"> • Click Answers • Click the table (Subject) you wish to use. The Subject holds data (fields). • Click the fields (columns) you wish to display in your report. • To add a condition, click the Filter button on the field. Select “All Choices” to view the correct format, and then select desired choice(s). • Click the Display Results button or the Results tab to view the report. <p><i>Tips:</i></p> <ul style="list-style-type: none"> • Each report must contain a Fact (measure) to return results. • Compound Layout is the “normal view” • If you move a column to the far left, it groups and sorts by that column. • The data warehouse is refreshed nightly.

Common Buttons/Functions

	Button	Function
Dashboard	Refresh 	The Refresh icon allows the user to refresh the dashboard so that the most current data is displaying.
	Printer Friendly 	The Printer Friendly icon allows the user to select PDF or HTML, which formats the report(s) currently displayed, in order to print.
	Add to Briefing Book 	The Add to Briefing Book icon allows the user to add the displayed view to a new or existing Briefing Book. Briefing Books can be viewed in <i>Answers</i> .
	Return	Return allows the user to go back to the main dashboard view after drilling.
	Back	Back allows the user to go back one view at a time after drilling.
		Page Options: <ul style="list-style-type: none"> • Apply Saved Selections – Allows the user to apply views they have saved previously. • Save Current Selections – Allows the user to save the current view and/or make this view their default for the page. (Example: User has drilled down to a detail set of specific data and wishes to return to this view without drilling each time). • Clear My Selections – Clears all selections and displays the data from the original view. • Create Bookmark Link allows the user to save (Browser Favorite) or share (Copy/Paste URL) the report view currently displayed.
Report	Modify	Allows user to customize columns and filters for the report. Save any modified reports to My Folders. DO NOT save personal modifications to reports in Shared Folders as those reports are used by others.
	Refresh	Refreshes data in the report, from the most recent cache
	Print	Allows user to select HTML or PDF and then print the report
	Download	Allows user to download the report into the following formats: <ul style="list-style-type: none"> • Excel, Excel 2000 • PowerPoint • Data (Excel .CSV) • Web Page (MHTML)
	Add to Briefing Book	Allows user to add the report to a Briefing Book
	Copy	Allows the user to copy the xml