Guide for Running OBI Reports

1. Go to https://www.vanderbilt.edu/pie/
2. Go to the Portal tab and click on “Academic Data Reports (OBI).”

3. You will be redirected to the following page:
   a. If working off campus or not connected to the Vanderbilt University network, you will need to connect to the Vanderbilt University VPN using Pulse Secure. Click on “SSL VPN” to get help setting up this connection.
   b. Click on “Oracle Business Intelligence” to access the Oracle Business Intelligence (OBI) reports, connecting first to the Vanderbilt University VPN, if necessary.
4. You will be asked to sign in using your VUNet ID and Epassword, as shown below.

5. Once logged in, you will be redirected to the Home Page of OBI. Click on “Catalog” in order to navigate the list of folders and reports that you have access to. You can add either of these pages to your Internet Browser’s bookmarks/favorites list for quicker access in the future.
6. a. By clicking on the “Shared Folders” on the left-hand side, you can view all report folders you have access to.
b. You can expand folder contents by clicking on the triangle directly to the left of the folder name in the list, double clicking on a folder name, or by clicking on the “Expand” option beneath the folder name.
c. You can drag the left-right dividing bar to create more space in the Folders list if needed.

7. Click “Open” to run a report.
- Answers (NSArray) reports sort A-Z at the top of the report list.
- BI Publisher (NSArray) reports sort A-Z at the bottom of the report list.
Questions ( ) Answers

8. a. Required report prompts are preceded by an asterisk.
   b. Optional report prompts are not preceded by an asterisk and usually contain the text “All Column Values.”

9. a. There are multiple ways to select prompt values:
   - Scroll down the choice list and select a value.
   - Use the “Search...” feature.
   - Type prompt values directly into the box and use semicolons (;) to separate values in the list.
     - Example: 2017F;2017S;2017U (without spaces after semicolons)
     - The prompt box will show highlighted values related to what you’re typing into it.
   b. Once all required prompts are populated, click “Continue.”
10. a. Data appears here.
   b. Change prompts and click “Apply” to return different result sets.

11. **Data Exporting Options**
   a. Click on the gear for Printing and Exporting options.
   b. Under the “Export to Excel” option, if the report contains multiple tabs:
      - Export Current Page will only export the page that is currently visible.
      - Export Entire Dashboard will export every tab in the report. When using this option, make sure every tab has the prompts set to the desired values.
12. **Favoriting a Report**
To add the current page (tab) of a report to your Favorites list, click on the Favorites menu and click on “Add to Favorites.”

- If you want to return to the first tab of a report when accessing it through the Favorites list, make sure to be on the first tab of the report when you click “Add to Favorites.”

![Image showing the Favorites menu](image1.png)

13. **Removing a Favorited Report**
To remove a report from your Favorites, click on the Favorites menu and click on the report you would like to remove. From there, click back on the Favorites menu and click “Remove from Favorites.”

- Alternatively, you can use the “Manage Favorites...” option to remove a Favorited page.

![Image showing the Manage Favorites option](image2.png)

14. Click on “Catalog” to return to the list of folders and reports.

![Image showing the Catalog page](image3.png)
15. a. Required report prompts are preceded by an asterisk.
b. Optional report prompts are not preceded by an asterisk and usually contain the text “All” or are left blank.

16. a. There are multiple ways to select prompt values:
   - For prompts with choice lists:
     - Scroll down the list and select a value.
     - Use the “Search…” feature.
   - For prompts without choice lists:
     - Type prompt values directly into the box and use commas (,) to separate values in the list.
     - Note: Blank prompts may be optional.
b. Once all required prompts are populated, click “Apply.”

17. a. Data appears here.
b. Change prompts and click “Apply” to return different result sets.
18. **Data Exporting Options**
   a. Click on the gear for Printing and Exporting options.
   b. Find export options by hovering over the “Export” option.

19. **Favoriting a Report**
   To add the current report to your Favorites list, click on the Favorites menu and click on “Add to Favorites.”

20. **Removing a Favorited Report**
   To remove a report from your Favorites, click on the Favorites menu and click on the report you would like to remove. From there, click back on the Favorites menu and click “Remove from Favorites.”
   - Alternatively, you can use the “Manage Favorites...” option to remove a Favorited page.
21. Click on “Catalog” to return to the list of folders and reports.