JANUARY 1, 2018

University of Wisconsin Business Intelligence

QUICK START GUIDE

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Contents

Change Log	1
Signing into UWBI	2
Signing Out of UWBI	3
Setting Preferences	3
Global Header	4
Favorites	5

Change Log

Description of Change	Resource	Date of Change
Update with comments from Robert Flum	Cati Cederoth	12/31/2017
Future updates: Add basic navigation, search and open	TBD	

Signing into UWBI

To Sign into UWBI:

- 1. In the address field of a browser, enter the URL https://uwbi.wisconsin.edu/analytics
- 2. Authenticate local organization by selecting a campus from the Select Organization dropdown, then select Go



3. The Login page appears. Enter NetID and Password, then select Login

Login	
NetID	Forgot NetID
Ex: bbadger	
Password	Forgot password
Login	

- 4. The Additional Login Required screen appears requiring a One-Time Password
- 5. Enter a **One-Time Password** with a fob or the VIP Access App on a cellphone (available on Apple and Android devices)

Additional Login Required					
Please enter the six-number of	code displayed on your One Time Password device to continue.				
One Time Password:	Continue				

6. Select Continue

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7. After signing in, the user is directed to a Landing Page. The Landing Page populates links in the form of tiles (highlighted red). The tiles are comprised of campuses the user has access to, e.g., Eau Claire or HR/Finance. The example figure below will not look like the user's Landing Page due to different levels of access

DRACLE Business Intelligence		Search Al		Q, Advance	d Administration	Help + Sign Out
NBI Landing Page	Home Cat	alog Favorites •	Deshboards +	New • Open •	Signed in As accord	nningham@wisc.ed ()
	UNIVERSITY OF WISCONSIN SYSTEM					
a University of Wisconsin Analytics hs home page provides links to all diahobards and analyses available to University of V	feconsin users. To access the deshboards and analyses available for a specific carryous or enter	rprise group, piezze sele	d the appropriate logo			
Announcements						
No announcements at this time.						
Available Dashboards						
JW Eau Claire	Human Resources and Finance	UN	V Madison	1.2.1		
Eau Claire				WISCO	ONSIN	
UW Platteville						
Helpful Resources						
Cracle Bl Documentation	Knowledge Base Division of Mon	mation Technology				

8. Once a tile has been selected, the user is directed to the tile's homepage

Signing Out of UWBI

To sign out of UWBI:

1. In the Global Header, select Sign Out

		Search A	· •		٩	Advanced	Help 🔻	Sign Out	<u>ا</u>	Global
Home	Catalog	Favorites 🔻	Dashboards 🔻	New v	Open 🔻	Signed	In As cjez	@uwsa.edu 🖣	·]	► Header

2. Close out of the browser

Note: Sign out before closing the browser, do not close the browser to sign out.

Setting Preferences

To set preferences:

- 1. In the Global Header select the dropdown arrow by Signed in as Username
- 2. Select My Account
- 3. Make desired changes
- 4. Select OK

My Account			0	×
User ID: cjez@ Display Name:	ouwsa.edu : cjez@uwsa.edu	I		
Preferences	BI Publisher Pi	references Mobile Preferences Delivery Options Application Role	es	
	Starting Page	Default 🗸		
Lo	cale (location)	Default - English - United States		
User Inter	face Language	Default - English		
	Time Zone	Default - Unknown Time Zone		
Subject A	rea Sort Order	Default - Sort in Saved Order ↓		
ŀ	Analysis Editor	Default - Start on Results tab when editing Analysis $igsymbol{ au}$		
Acce	essibility Mode	● Default ─ On ─ Off		

Global Header

The **Global Header** will always display in the top right of any screen while in UWBI. Note that options listed will vary depending on the privileges the user has. For example, a consumer will not see the "New" option.

	Search All	▼	Q Advanced	Help 🔻	Sign Out
Home Catalog	Favorites 🔻	Dashboards 👻 New 👻	Open 👻 Sig	ned In As	TestUserS 🔻
					¢ 0

- Search Enables users to search the catalog
- Advanced Displays the Catalog Page in search mode
- Help Displays Home Help and Help Contents
- Sign Out Signs out of UWBI
- Home Displays the Home Page
- Catalog Displays the Catalog Page
- Favorites Displays favorite objects and categories
- Dashboards Contains links to all dashboards
- New Displays a list of objects. To create an object, select it from the list
- Open Use to open objects

Favorites

The use of the Favorites functionality (from the global header) is a useful way for every user to customize their experience. Saving a **Favorite** allows users to navigate to a certain dashboard and tab with a shortcut.

To save a Favorite:

- 1. Navigate to desired dashboard and tab
- 2. Select the Favorites dropdown from the Global Header
- 3. Select Add to Favorites



To view Favorites:

1. After a Favorite has been saved, a list of Favorites will appear under the Favorites dropdown in the Global Header

To manage Favorites:

- Select Manage Favorites
 - Here users can:
 - Create more organization by making Categories
 - To create a **Category**:
 - Select **New Category** (highlighted red in figure below)
 - Title the **Category**
 - Select OK
 - Select a Favorite to add to the Category
 - Select the **Copy** icon (highlighted blue)
 - Select the Category, and select the Paste icon (highlighted yellow)
 - To view Category contents, double click on the Category
 - To return to the Favorites list, click on Favorites
 - Once an item is in a Category, delete it from the Favorites list. Select the Favorite, and select the Remove icon (highlighted orange)
 - Rename a Category

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- To rename a **Category**:
 - select the Category
 - Select the **Rename** icon (highlighted green)
 - Rename
 - $\circ \quad \text{Select} \ \textbf{OK}$
- Remove a Favorite or Category
 - To remove an item:
 - Select the item, and select the **Remove** icon (highlighted orange)
- Sort Favorites and Categories
 - To sort items
 - Select the **Sort** icon (highlighted purple) and select desired option (A-Z or Z-A)
 - When done with modifications, select **OK**

Manage Favorites	G	×	C
▶ E Favorites	Favorites Workforce - CE - Overview Workforce - CE - Employee Detail Workforce - EV - Overview	×	