NV301 – Umoja Advanced BI Navigation

Umoja Advanced BI Navigation – Version 9

Last Modified: 19-Jan-2018

Agenda

Course Introduction
Module 1: Analysis Workspaces
Module 2: Define and Modify an Analysis
Module 3: Add a Sub-analysis and Chart
Module 4: Save, Send and Print an Analysis
Module 5: Customizing WebI Reports
Course Summary
Course Assessment
Course Survey

Introduction

Please share with us:

- Your Name
- Your Section/Unit
- # Years with the UN
- Interesting Fact About Yourself

Ground Rules

Please consider the following guidelines during the training session:

- Turn your cell phone to silent mode. Please step out of the class to take any important phone call
- Please do not access your e-mail or the Internet outside of breaks
- Participate fully in the training session and respect each other’s contribution
- Breaks are included at the discretion of the trainer

No Phones | **Do Not Access E-mail** | **Participate** | **Ask Questions** | **Breaks**

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Course Overview

The purpose of the **Umoja Advanced BI Navigation** is to explain the Business Intelligence (BI) reports. This course will also explain the steps to add and modify analysis and charts.

Prerequisite Review

You should have completed the following prerequisite courses:

- Umoja Overview
- Umoja Master Data & Coding Block Overview
- Umoja BI Navigation

Course Duration: 6 hours

Course Objectives

After completing this course, you will be able to:

- Describe Umoja Business Intelligence (BI) reports
- Explain how to access the Online Analytical Processing (OLAP) tool
- Explain the steps to define, modify, add and delete an Analysis Workspace
- Explain the steps to add and customize charts within an Analysis Workspace
- Explain the steps to save, send and print an Analysis Workspace

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Module 1 Objectives

After completing this module, you will be able to:

- Describe the purpose and capability of Umoja BI
- Explain the difference between Web Intelligence (WebI) Reports and Analysis Workspaces
- Access and navigate through an Analysis Workspace
- List the icons used in the Analysis Workspace

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Key Terminology

Key Term	Description
BI Portal	Web-based application that is used to access the Umoja BI system.
Web Intelligence (WebI)	Pre-formatted, static reports, which are available for all BI users, depending on process area.
Analysis Area/Workspace	BI Tool only available to specific BI users that can be used as a starting point to create complex, ad-hoc, queries instantaneously. Analysis Areas are separated by process. For example, certain users have access to the Purchase Order Analysis Area, the Funds Management (FM) Analysis Area, etc.
Key Figures	The measures that describe values, quantities, or other numerical metrics.
Characteristics	Fields that are used to “slice and dice” data in an analysis, such as Vendor or Cost Center.

Key Terminology

Key Term	Description
Attributes	Refers to the breakdown of certain characteristics to a deeper level, offering detailed options not necessarily available in Umoja ECC. For example, region of supplier, lifecycle status of grant or fund type

Roles & Responsibilities

The following Umoja Enterprise role is involved in the Umoja BI Advanced Navigation process:

BI Power User

- Access to view and analyze collections of Umoja data related to a specific process area. For example, Funds Management BI Power Users can access FM-related data elements.
- In addition to Power Users are able to:
  - View, query, and manipulate sets of data for ad-hoc requirements using the Analysis Workspaces
  - Save Workspaces to share Analysis with other power users
  - Access formatted Web Intelligence reports viewable by all BI Users. For example, a trial balance report

BI Overview

Umoja BI refers to the data and reporting tools that are used to support decision making across the organization.

Umoja BI:

- Consists of components that support data management and modeling through the use of analytical tools
- Provides UN with historical and current view of operations

Umoja BI is an application distinct from ECC and SRM, both of which may offer their own individual reports:

Umoja BI Reports

Umoja BI

Umoja BI reports are:

- Created by accessing information from several data sources
- Not based on exact real-time data due to a maximum lag of 24 hours*
- Accessed via the BI web portal by selecting the appropriate folder and/or link
- Able to create graphical representations of data

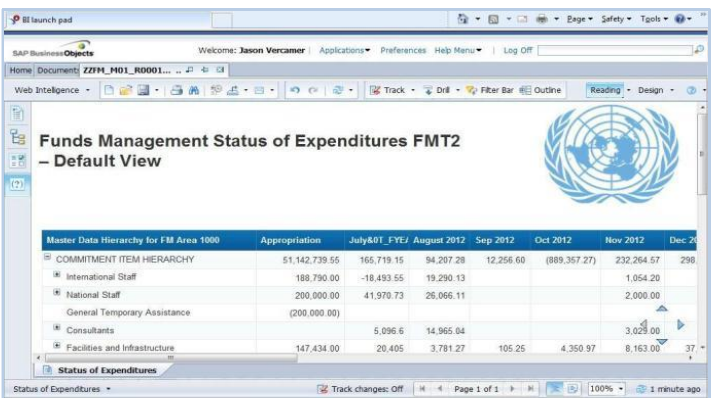
*The 24 hour time lag exists because it takes time and processing to reorganize data to support complex reporting.

Types of BI Reports

There are two specific types of reports that BI Users and/or BI Power Users can review and generate within the Umoja BI portal. These reports are as follows:

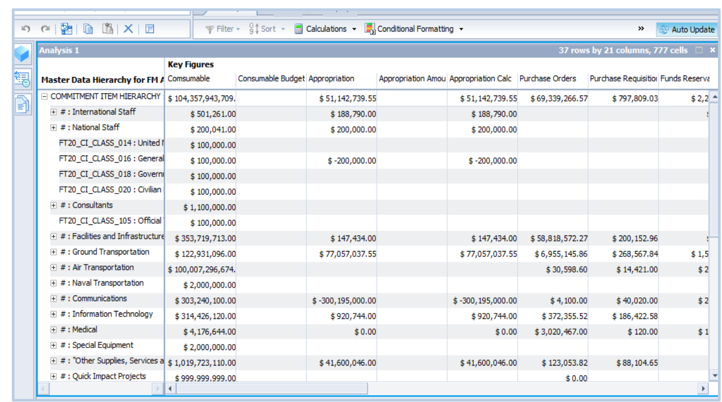
Web Intelligence Reports (WebI)

WebI reports are formatted reports that **BI Users** and **BI Power Users** can view from the BI portal.



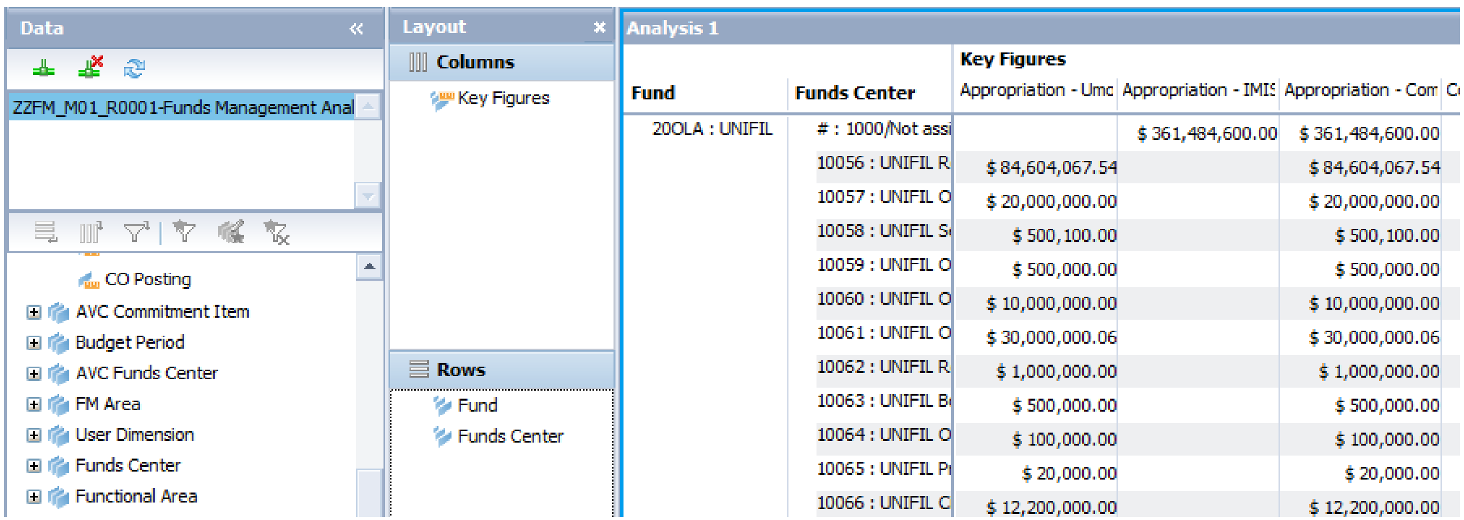
Analysis Workspaces

Analysis Workspaces are ad-hoc, custom queries that **BI Power Users** can access and edit within the BI portal.



Analysis Areas

Data that is available within the Analysis Workspace tool is organized in **Analysis Areas**. Each Analysis Area contains the characteristics and Key Figures (measures) associated with that process. For example, the Purchase Order Analysis Area contains characteristics such as Cost Center and Purchasing Group.



In other words, the Analysis Area is a blank slate which gives you the tools you need to build customized analyses and reports.

Overview – Analysis Areas

The following Analysis Areas are available in the Umoja BI system:

General Ledger (G/L)

- Trial Balance
- G/L Line Item

Funds Management (FM)

- Funds Management
- Budget Consumption (Detailed)
- Budget Consumption (Summary)

Supply Chain

- Requisitions
- Purchase Orders
- Solicitations
- Contracts
- Vendors

Real Estate

- Real Estate Conditions
- Real Estate Measurements
- Real Estate Cash Flow
- Real Estate Occupancy
- Real Estate Contract Measurements

<u>**Note**</u>: This is only a partial list of Analysis Areas. More reports will be added to Umoja over a period of time. Please refer to the **Advanced BI Job Aids** for more information about each of these Analysis Areas.

Overview – Funds Management Area

An overview of the FM Area is provided below:

Description

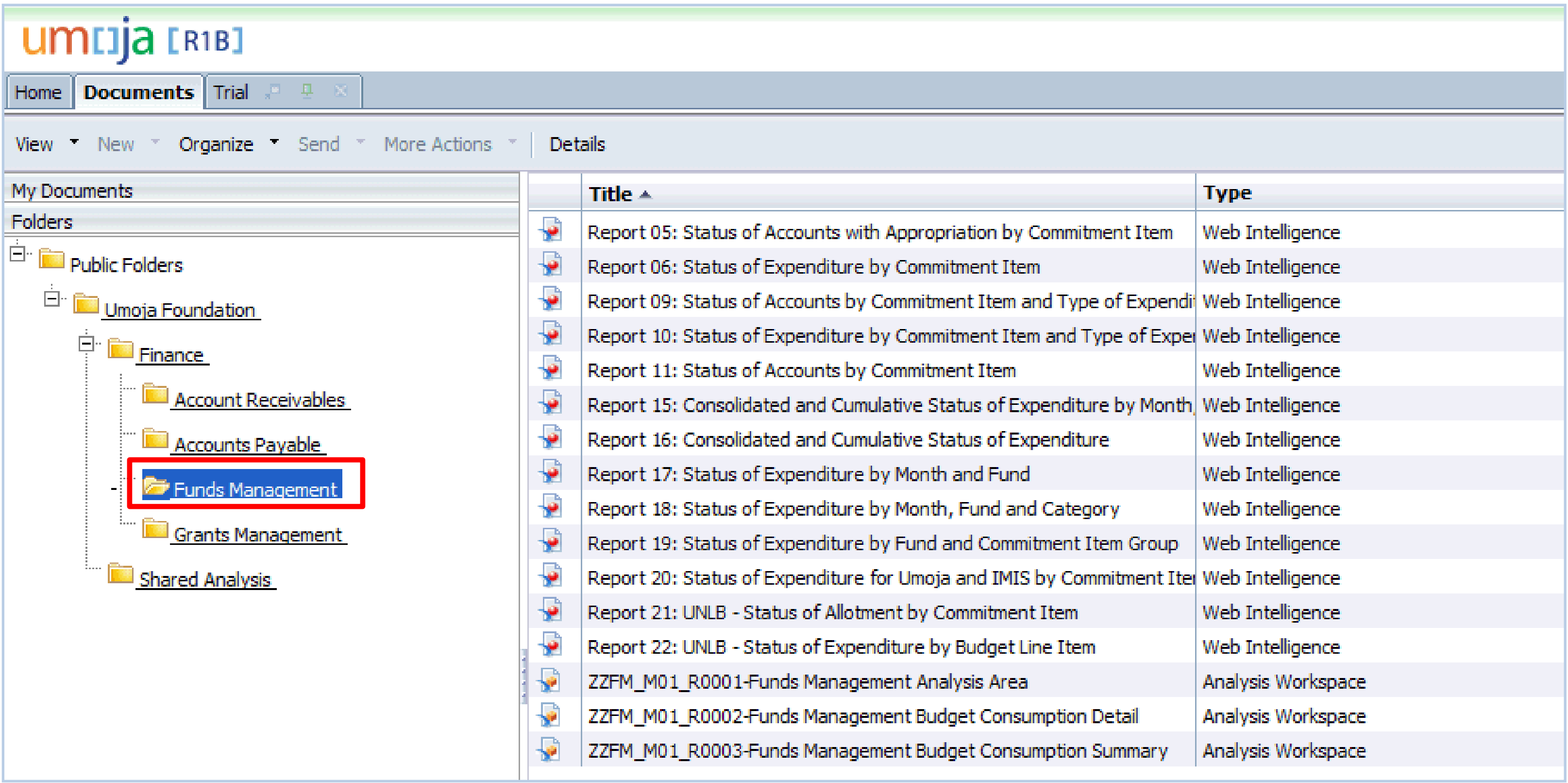
- The **Funds Management Analysis Area** compiles FM records from Umoja ECC with some from IMIS. This is necessary because there are no other reports that compile information from thee two sources in one location
- The Budget Consumption Summary and Budget Consumption Details Analysis Areas display consumable and available budgets

Purpose

- Finance Officers can track the budget availability of a Fund, Funds Center or Functional Area
- Chief Finance Officer of a mission, Special Political Mission (SPM) or UN office can review available budget
- Grant or Fund Manager can request G/L accountant for a Funds Balance report to track statuses of budgets

Funds Management – Analysis Area

Click the **Funds Management** folder to view the full list of Funds Management Analysis Area.



Overview – General Ledger Area

An overview of the G/L Area is provided below:

Description

- The **G/L Line Item Analysis Area** lists all Financials (FI) documents for a given period along with account assignment objects such as Fund, Grant, and Business Area
- The **Trial Balance Analysis Area** shows the opening balance, total debit movement, total credit movement, total net movement, and ending balance in columnar format for any given period

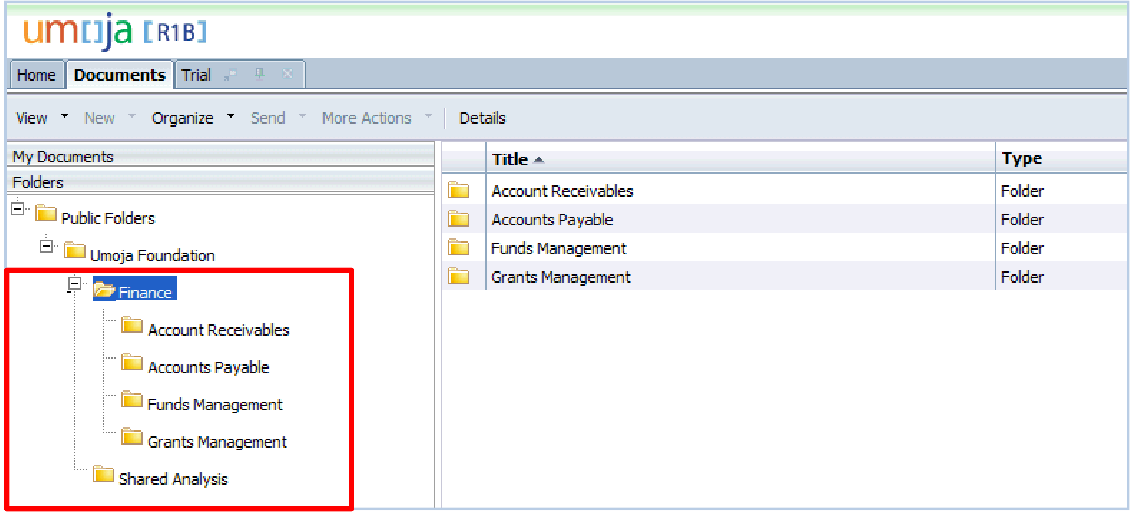
Purpose

- Although Umoja provides standard Balance reports, there is no standard ECC report with the classic trial balance column format that runs by Business Area, Fund, Grant or Segment. This is provided by the Trial Balance Analysis Area
- Financial Staff and Accounting Officers can use the G/L Line Item Analysis Area to get a complete picture at all direct entry documents that have been entered into the Umoja G/L

Finance – Analysis Area

Under the **Folders** section, you can view different folders and sub-folders for each process area. The sub-folders under the **Finance** folder are:

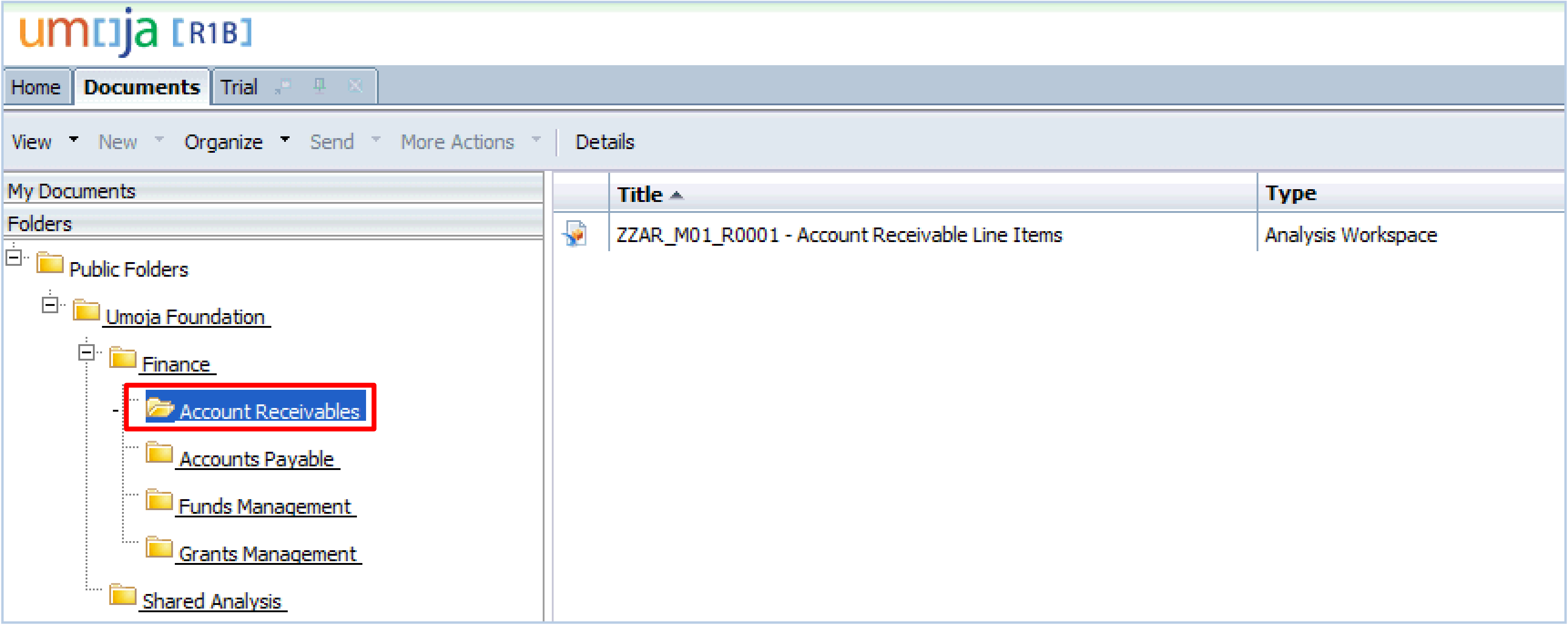
- Account Receivables
- Accounts Payable
- Funds Management
- Grants Management



Note: The navigation slides are based on the Finance Analysis Area but you should select the correct process area in relation with the assigned role.

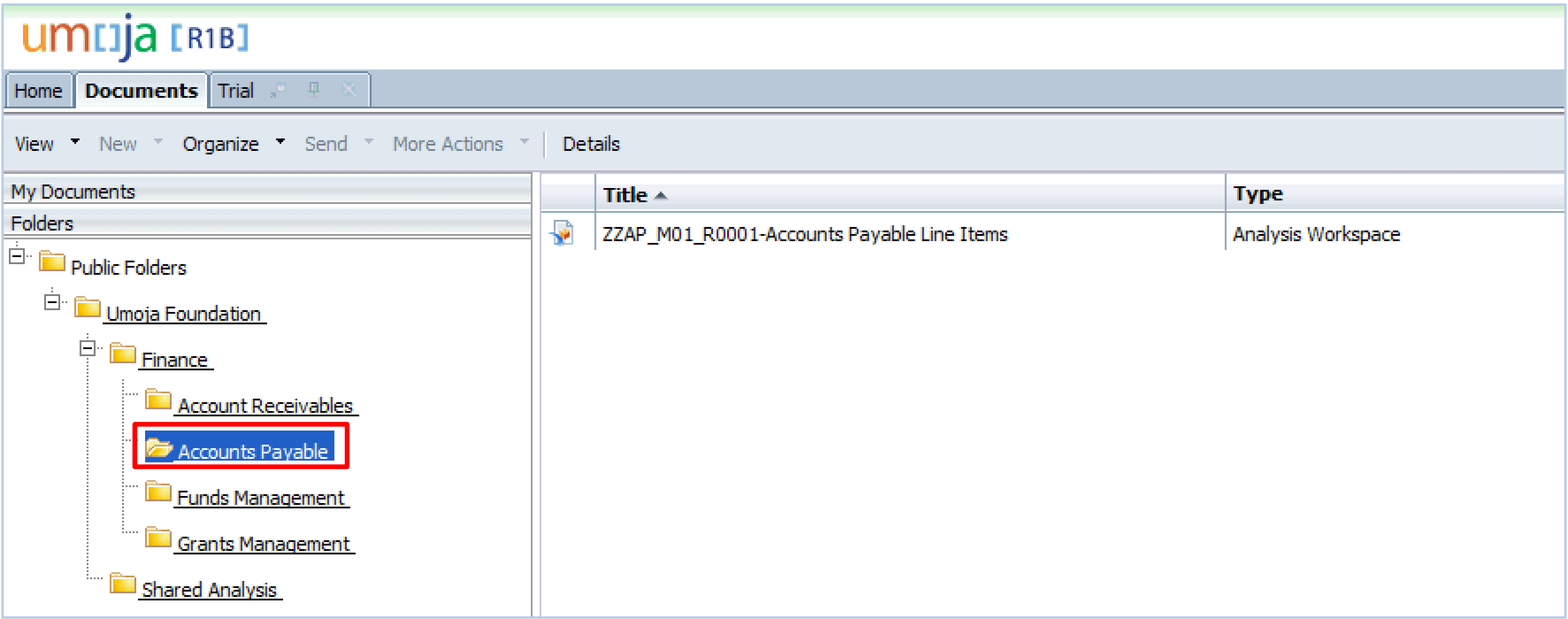
Accounts Receivables – Analysis Area

Click the **Accounts Receivables** folder to view the full list of Accounts Receivables Analysis Area.



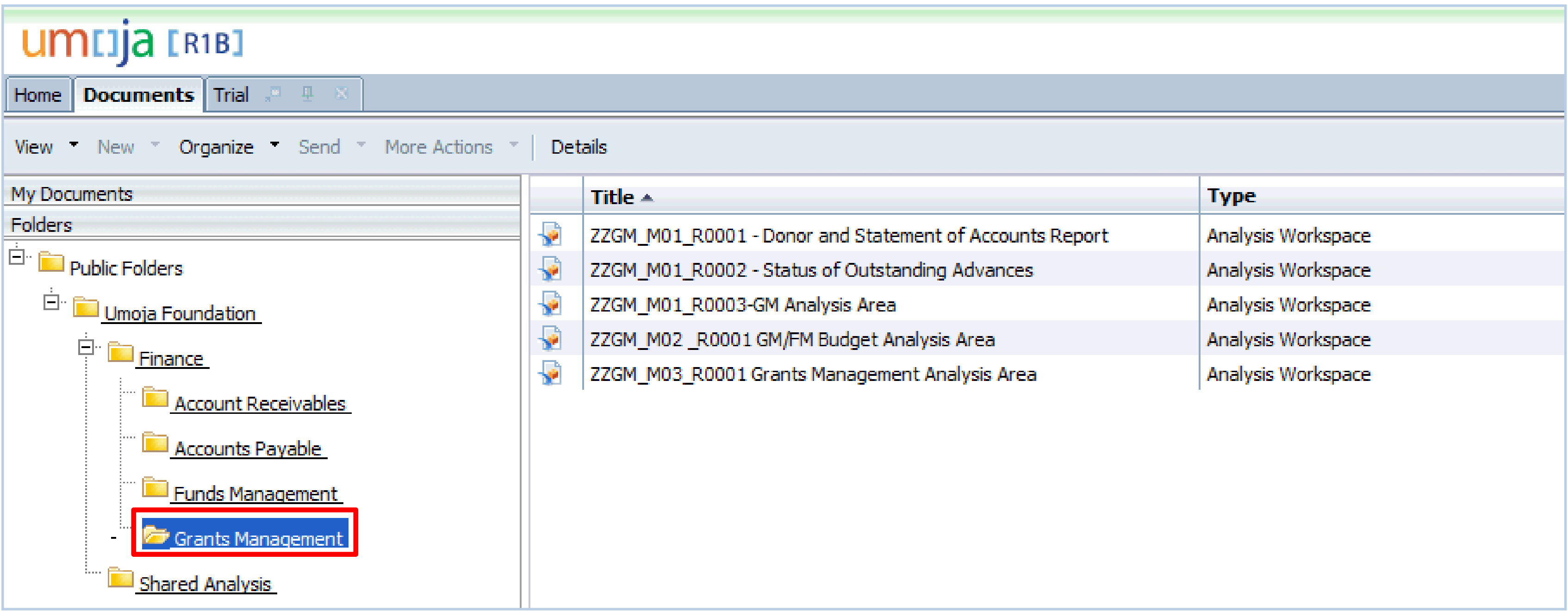
Accounts Payable – Analysis Area

Click the **Accounts Payable** folder to view the full list of Accounts Paybale Analysis Area.



Grants Management – Analysis Area

Click the **Grants Management** folder to view the full list of Grants Management Analysis Area.



Overview – Supply Chain Area

An overview of the Supply Chain Area is provided below:

Description

- The **Requisitions, Purchase Orders, Solicitations, and Contracts Analysis Areas** provide aggregated measures and detailed analysis based on data from Umoja SRM
- The **Vendor Analysis Area** provides information about Business Partners classified as Vendors in Umoja and United Nations Global Marketplace (UNGM)

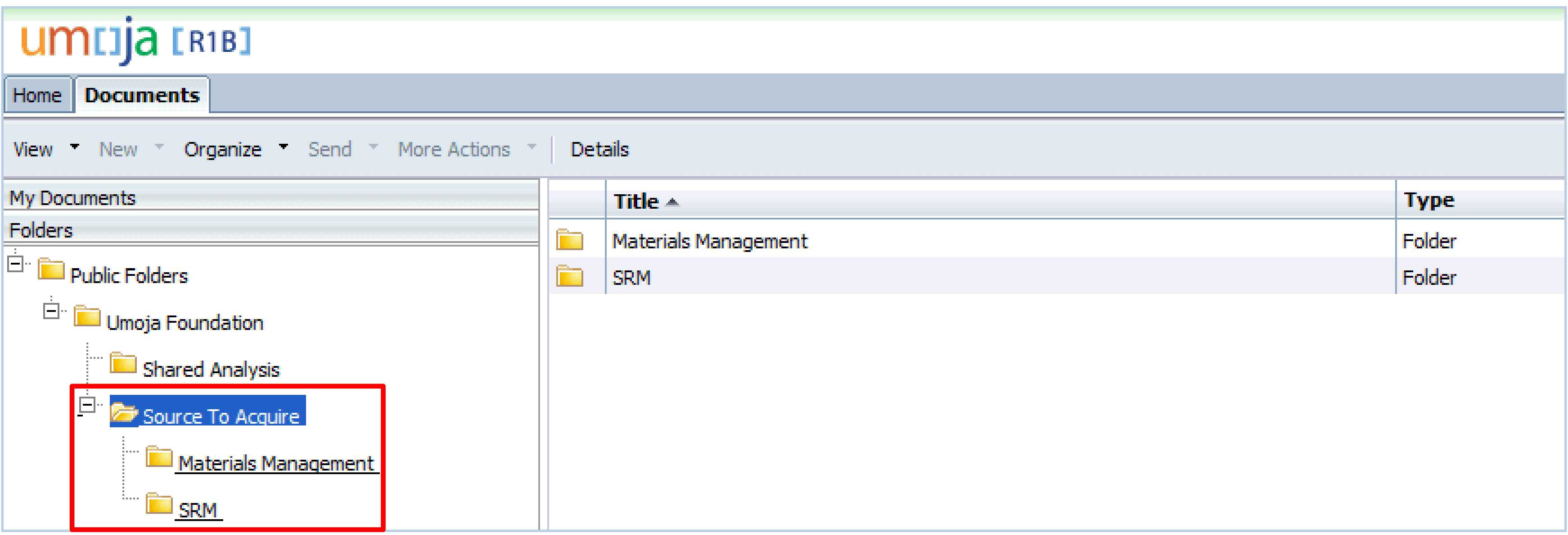
Purpose

- Procurement officers and related personnel can view metrics concerning SRM documents in an ad-hoc fashion. While SRM provides detailed information about each purchasing document, aggregate reporting is not as readily available
- Users without access to either Umoja SRM or UNGM can view comprehensive metrics as well as bidding and contractual histories for vendors in Umoja

Supply Chain – Analysis Area

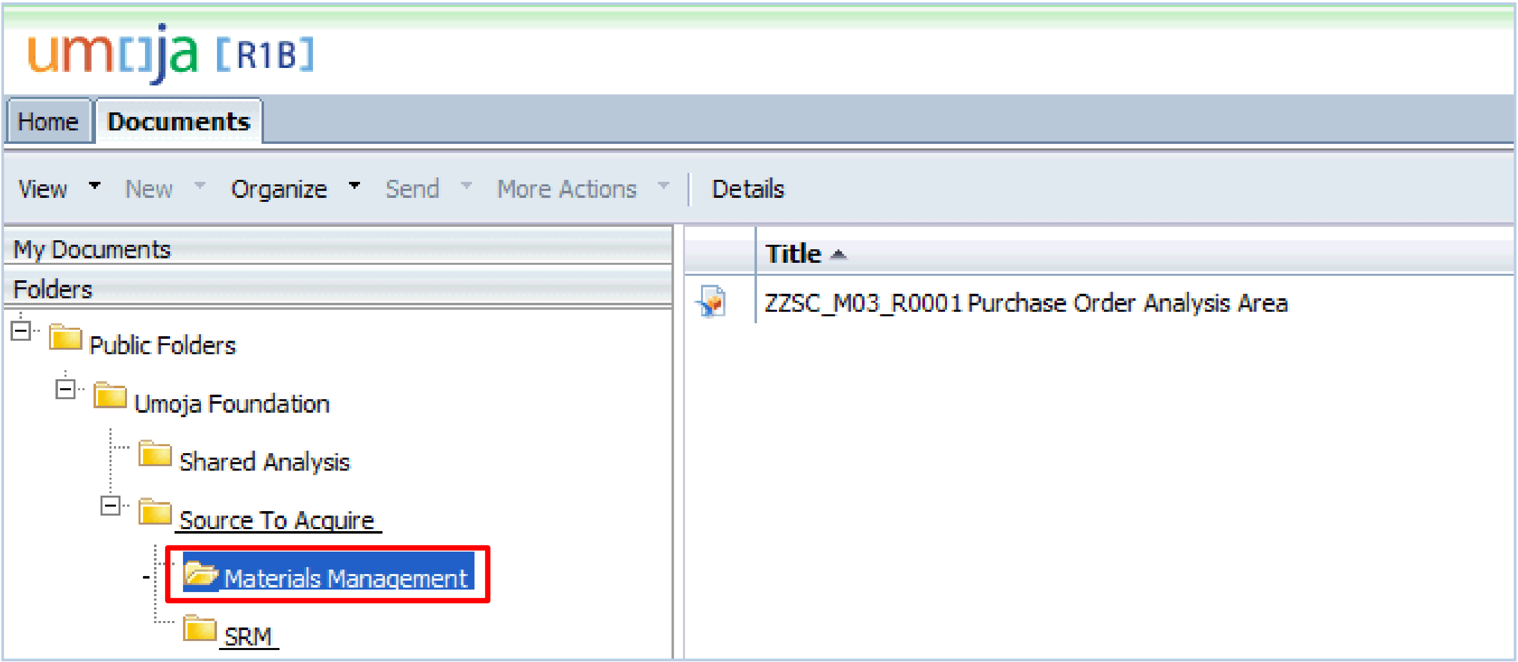
Similarly, some of the sub-folders that can viewed under the **Source To Acquire** folder are:

- Materials Management
- SRM



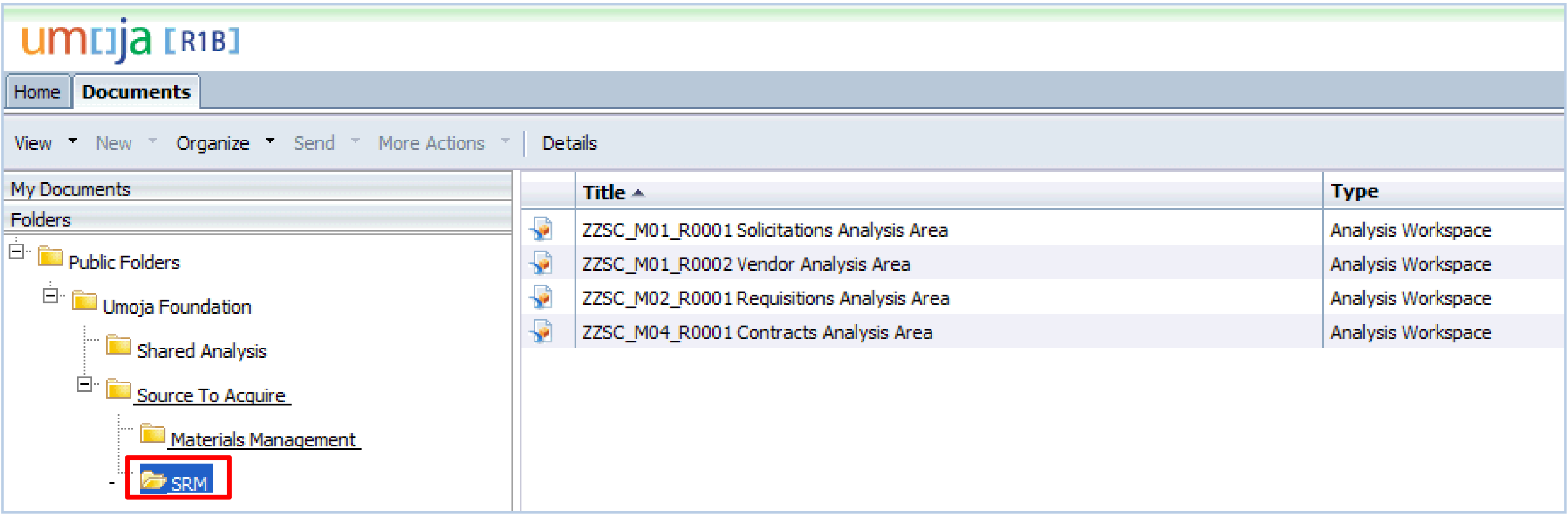
Materials Management – Analysis Area

Click the **Materials Management** folder to view the full list of Material Management Analysis Area.



SRM – Analysis Area

Click the **SRM** folder to view the full list of SRM Analysis Area.



Overview – Real Estate Area

An overview of the Real Estate Area is provided below:

Description

- The **Real Estate Conditions, Measurements,** and **Occupancy Analysis Areas** provide data relevant for the Portfolio Management process. Portfolio Management defines the real estate infrastructure and manages business partner relationships.
- The **Real Estate Cash Flow** and **Contract Measurements Analysis Areas** provide data relevant for the Lease Administration process.

Purpose

- Real Estate data found in OLAP Analysis Areas provide data of operational and strategic interest to Facilities Managers throughout the organization.
- Real Estate Power Users are able to report on both the Architectural View (functional data) and Usage View (financial data) regarding Real Estate assets

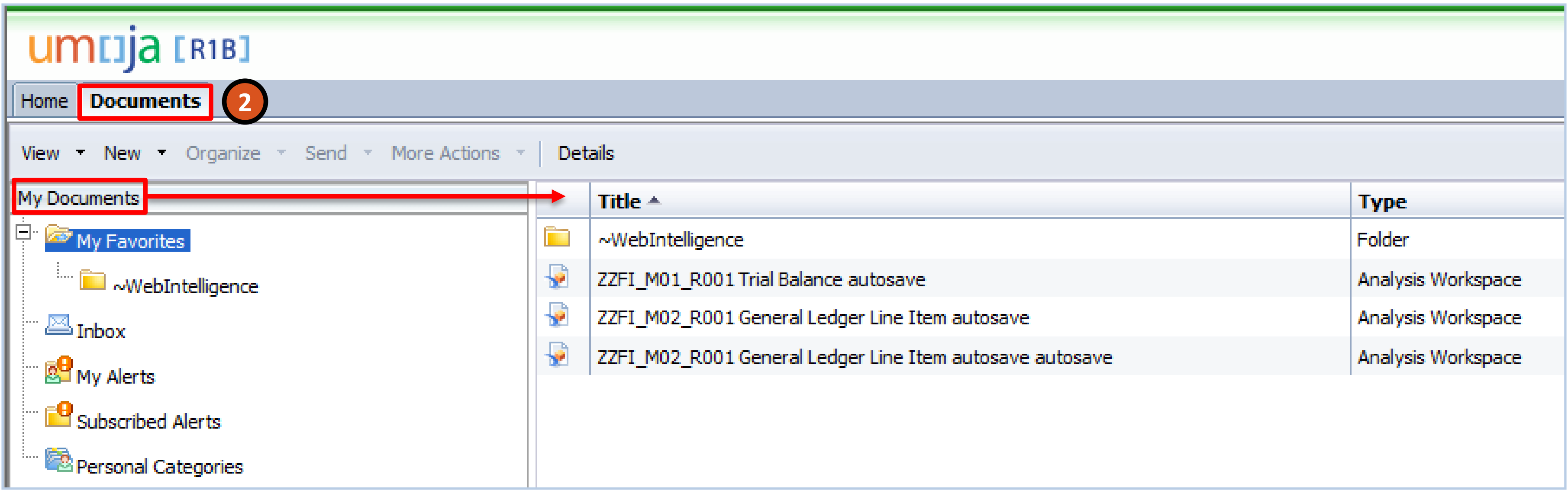
Real Estate – Analysis Area

Click the **Real Estate** folder to view the full list of Real Estate Analysis Area.

Access Analysis Workspace

The steps to access an Analysis Workspace are:

1. Log in to the BI portal
2. Click the **Documents** tab



Note: In the **My Documents** section, you will see any workspaces that you have saved to your personal folder (Saving workspaces will be covered later in the course).

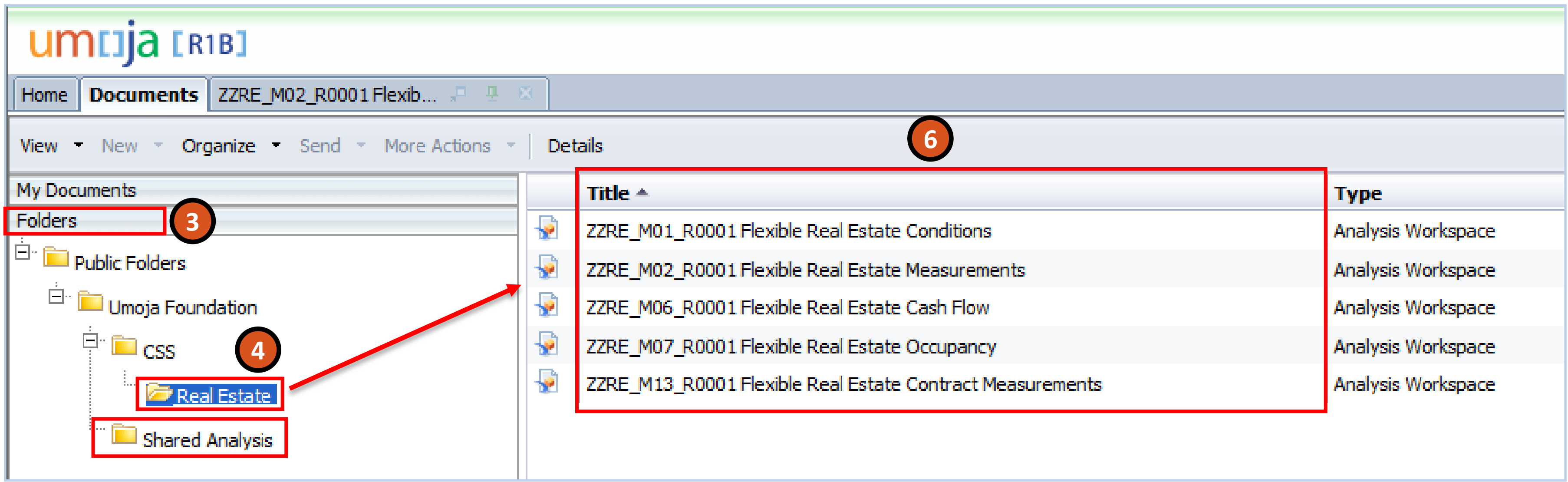
Access Analysis Areas

3 Click the **Folders** tab

4 Click the appropriate folder. A list of folders that align to your process (for example, Real Estate) will be displayed.

5 Navigate through the folders to find the full list of Analysis Areas

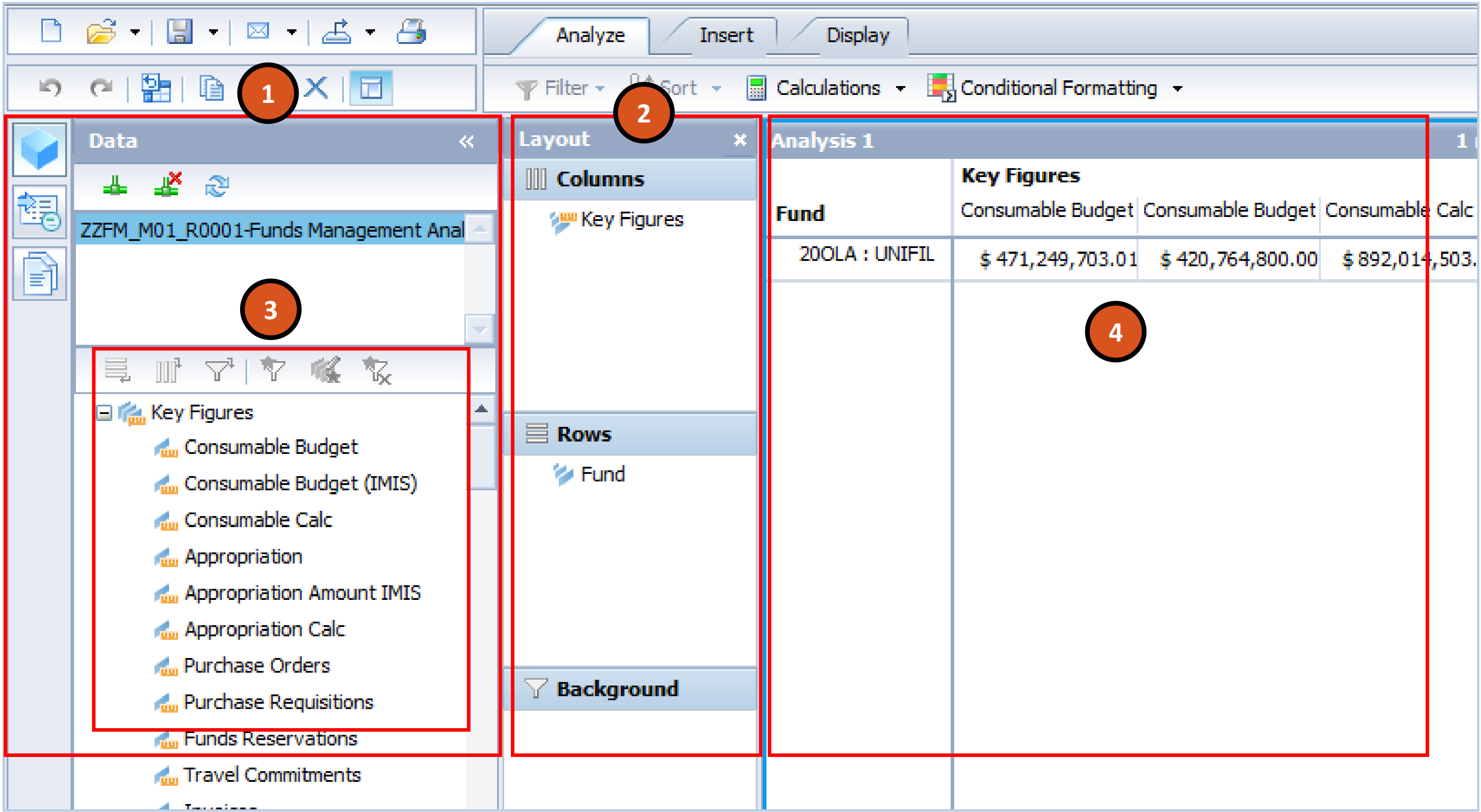
6 Double-click the title of an Analysis Area to open it in a new tab



<u>**Note**</u>: The **Shared Analysis** folder is used for all customized reports or workspaces which other users have shared publically. If you would like to share your analyses with others, they must be saved in this folder.

Navigating Analysis Workspaces

The screenshot below highlights the different navigational elements of an OLAP Analysis Area



1 Task Panel

2 Layout Panel

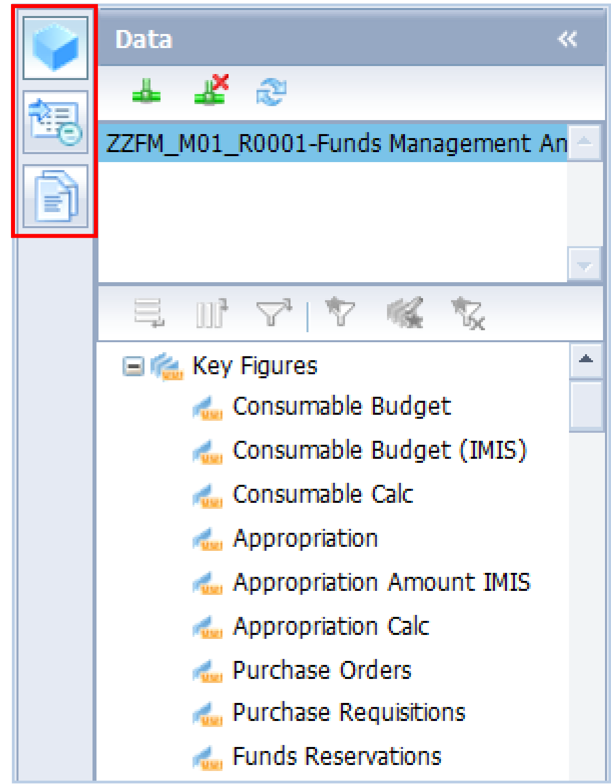
3 Metadata Explorer

4 Analysis Window

Navigating Analysis Workspaces

Task Panel

The **Task** panel is located on the left side of the screen. The three icons on the left side of the panel can be used to change the information that appears in the panel. These three icons are as follows:



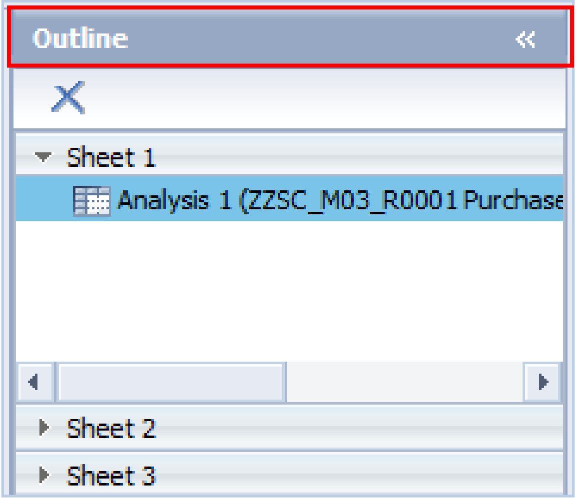
- **Data** 
  The **Data** icon opens the **Data** tab that is used to add or remove data sources from the analysis. It is also used to perform navigation functions, such as adding a hierarchy to rows or columns, adding a background filter or adding a favorite grouping

- **Properties** 
  The **Properties** icon opens the **Properties** tab that displays the configurable properties of the selected component, for example, column width or chart style

Navigating Analysis Workspaces

Task Panel

- **Outline**
  The **Outline** icon opens the **Outline** tab that provides an overview of the current workspace that can be useful when the workspace contains many sheets. This tab enables the user to quickly switch to another analysis in the workspace and to remove any analysis that is currently not in use

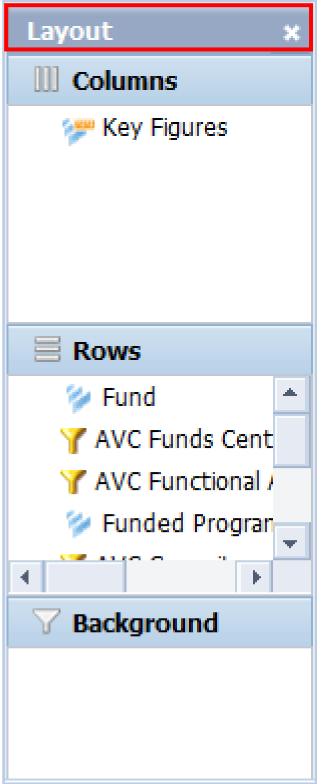


<u>Note</u>: The **Task** panel also displays specific tasks, such as the **Calculation**, **Filter** and **Conditional Formatting** panels. You can hide the entire **Task** panel to maximize the Analysis window size.

Layout Panel

The **Layout** panel is the panel adjacent to the **Task** panel. In this panel, you can:

- Drag and drop different hierarchies and measures into the rows or columns of your analysis, similar to a Pivot table in Excel
- Drag and drop different measures as a background filter to your analysis
- Perform navigational operations on hierarchies and measures including filtering, re-ordering and swapping objects



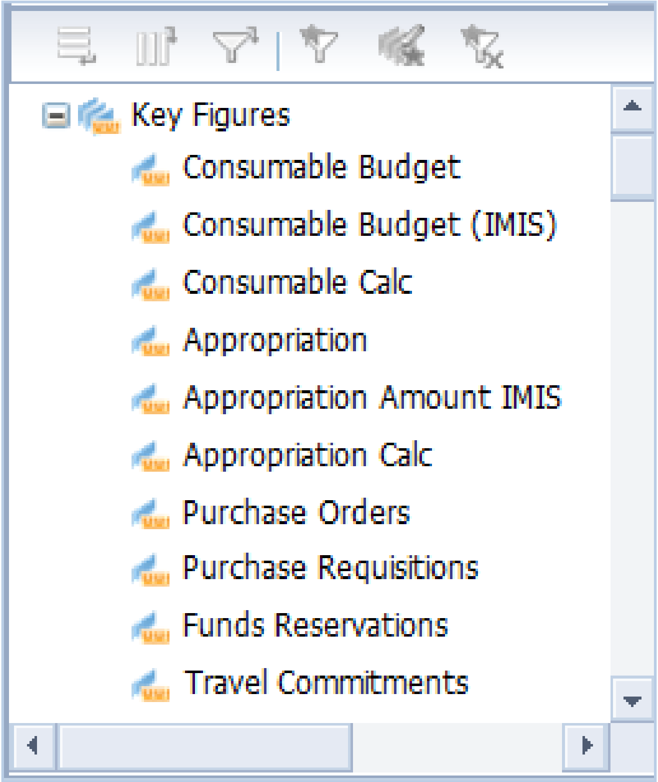
Note: You can hide the **Layout** panel to maximize the Analysis window size.

Navigating Analysis Workspaces

Metadata Explorer

The Metadata explorer resides within the **Data** tab and displays the Key Figures and Characteristics contained in a displayed data source.

For example, if the FM data source is selected, all the Key Figures related to FM, such as Down Payments or Appropriations, are displayed.



Navigating Analysis Workspaces

Analysis Window

The Analysis window is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data.

It is located to the right of the **Layout** panel. This window displays the core components of the Analysis Area report.

Analysis 1

		Key Figures		
Account Number	**Currency Key**	Opening Balance	Total Debit Postings	Total credit postgs
11101316 : Csh U	USD : United Stat	$ 0.00	$ 4,678.55	$ 4,678.55
11701010 : Csh M	USD : United Stat	$ 0.00	$ 1,113,241,757.82	$ 834,487,522.42
11701019 : Csh M	USD : United Stat	$ 0.00	$ 7,404.94	$ 6,579.74
11711000 : Cash	USD : United Stat	$ 0.00	$ 103,666.79	$ 103,667.43
11711001 : CshrC	USD : United Stat	$ 0.00	$ 52,800.64	$ 4,300.00
11715001 : CshP	USD : United Stat	$ 0.00	$ 0.00	$ 0.12
11715007 : CshP	USD : United Stat	$ 0.00	$ 19,478.04	$ 19,603.41
11721001 : CshrI	USD : United Stat	$ 0.00	$ 1,100.00	$ 600.00
13101010 : AR A:	USD : United Stat	$ 0.00	$ 21,300.00	$ 0.00
13101014 : AR A	USD : United Stat	[illegible]	[illegible]	[illegible]

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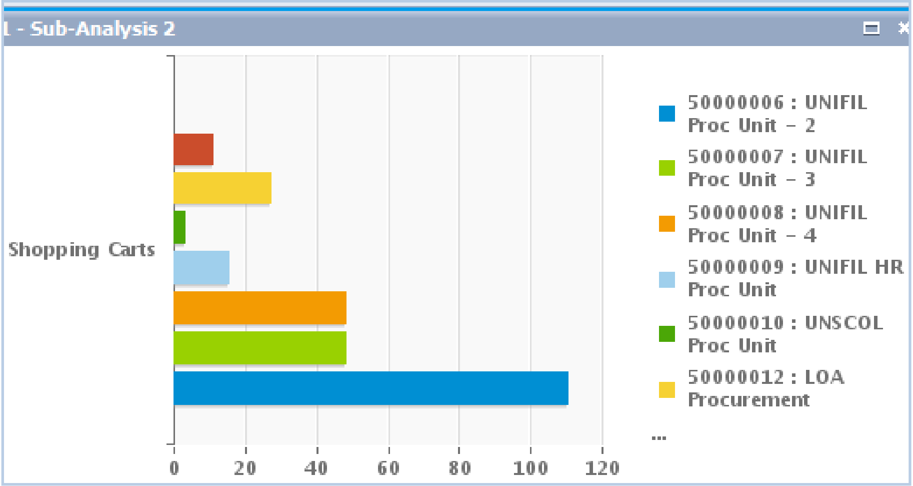
Navigating Analysis Workspaces

Chart

A chart is a bar, line or any other type of chart object that is added to the Analysis window to visualize the data in the analysis.

There is the option of adding more than one chart type. These additional charts display adjacent to each other and can be moved around on the screen, as required.



Icons used in Analysis Workspaces

The frequently used icons when working with Analysis Workspaces are as follows:

Name	Icon	Description	Examples
Key Figures		Numerical values which are measured in the analysis	Invoices (value) and Quantity
Single Figure		By default, all Key Figures are displayed in an analysis. Single figures/metrics can be displayed instead	Same as above
Characteristic		Fields in Umoja that are used to differentiate and analyze Key Figures	Fund and Purchasing Organization
Attribute		Used to describe characteristics in more detail	Attributes of Location/Plant are Country and Local Currency
Filter		Enables filtering the analysis on a specific characteristic or set of characteristics	Filtering an analysis only on the current posting period

Structure of an Analysis Workspaces

Key figures and characteristics are the main components of an Analysis Workspace. By default, all Key Figures for a specific Analysis Area are set in the **Columns** section of the analysis, while any characteristics are placed in the **Rows** section.

In the example below, the Key Figures for the Purchase Requisition Analysis Area are separated into each column, while the chosen characteristic, Purchasing Group, is listed by row.

Rows | **Columns**

Layout

Columns
- Key Figures

Rows
- Purchasing Group

Analysis 1

	Key Figures					
Purchasing Group	Shopping Carts	Line Items	Order Quantity	Net Value	Average Quantity C	Average Price
50000006 : UNIFIL Proc Unit - 2	110	155	*	*	*	*
50000007 : UNIFIL Proc Unit - 3	48	54	*	*	*	*
50000008 : UNIFIL Proc Unit - 4	48	107	*	*	*	*
50000009 : UNIFIL HR Proc Unit	15	20	20.0 EA	$ 2,203,680.00	1 EA	$ 110,184.00
50000010 : UNSCOL Proc Unit	3	13	*	*	*	*
50000012 : LOA Procurement	27	56	*	$ 200,100.00	*	$ 3,573.21
50000016 : UNHQ - Eng. Support Tea	11	17	*	*	*	*
# : Not assigned	0	0	0.0	$ 0.00	0	$ 0.00

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Learning Checkpoint 1

Which of the following elements is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data?

Select the correct option:

A. Task panel

B. Layout panel

C. Analysis window

D. Chart

Learning Checkpoint 1

Which of the following elements is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data?

Select the correct option:

A. Task panel

B. Layout panel

C. Analysis window

D. Chart

Option C is the correct answer. The Analysis window is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data.

Module 1 Summary

The key points covered in this module are listed below:

- Analysis Workspaces can be accessed by clicking the Documents tab in the BI portal
- The Task panel has three icons that are used to change the information that appears in the panel. These three icons are Data, Properties and Outline
- The Layout panel is used to drag and drop hierarchies and measures. It is also used to perform navigational operations on hierarchies and measures
- The Metadata explorer displays the measures contained in a displayed data source
- The Analysis window is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data
- A chart is a bar, line or any other type of chart object that is added to the Analysis window

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Module 2 Objectives

After completing this module, you will be able to:

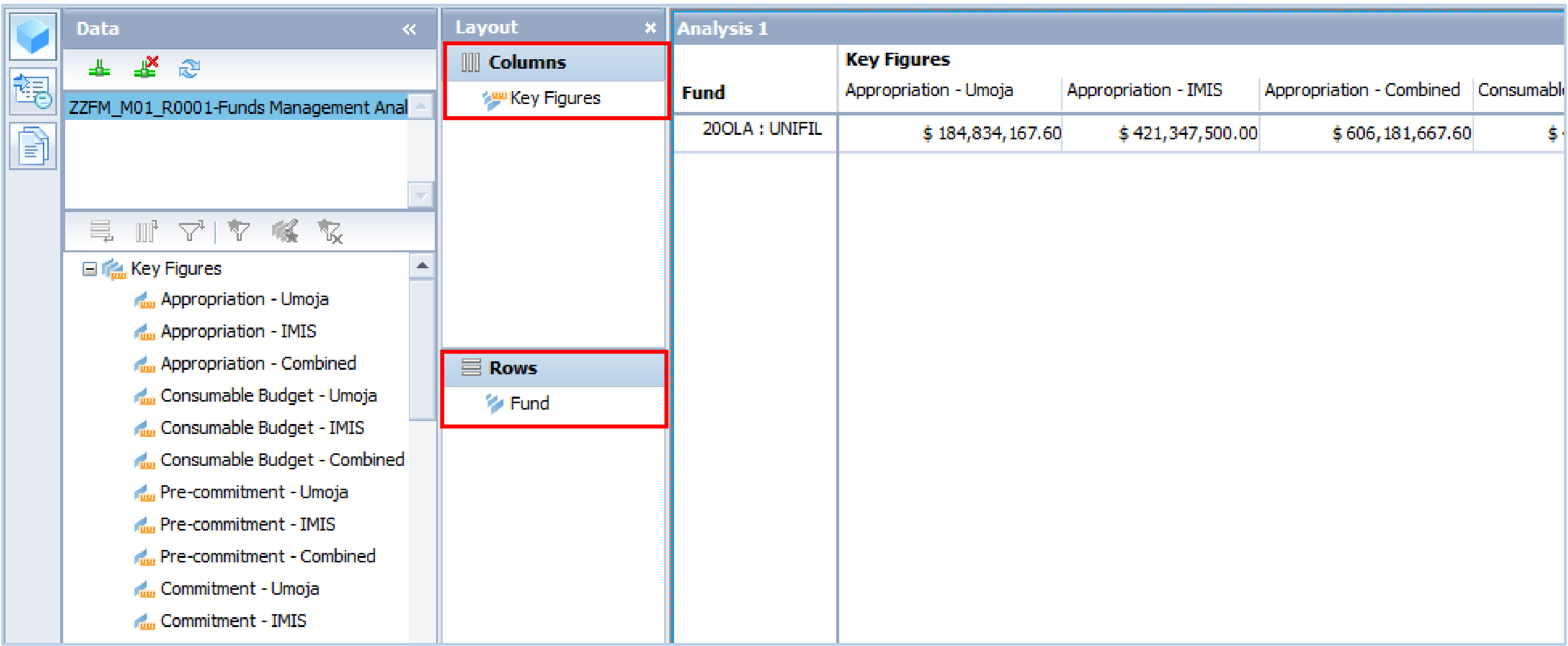
- Define a new analysis
- Modify an analysis in a Pre-Built Workspace

Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

When you open an Analysis Area, by default all **Key Figures** are listed in the **Columns** section, while one or more characteristics are in the **Rows** section.



Funds Management Analysis Area

Define a New Analysis

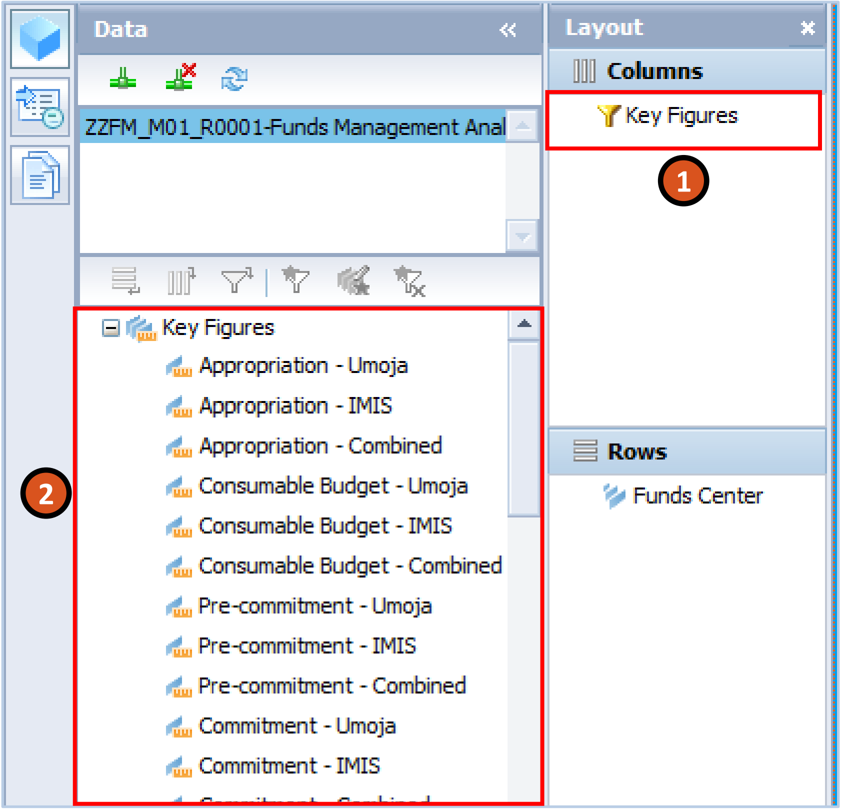
Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

The steps to modify the Key Figures in your analysis are as follows:

1. Drag the **Key Figures** label from the **Columns** section into the **Data** panel
2. Expand the **Key Figures** label in the **Data** panel
3. Drag the desired Key Figure back into the **Columns** panel

The icon next to **Key Figures** will turn into a **Filter** icon.



Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

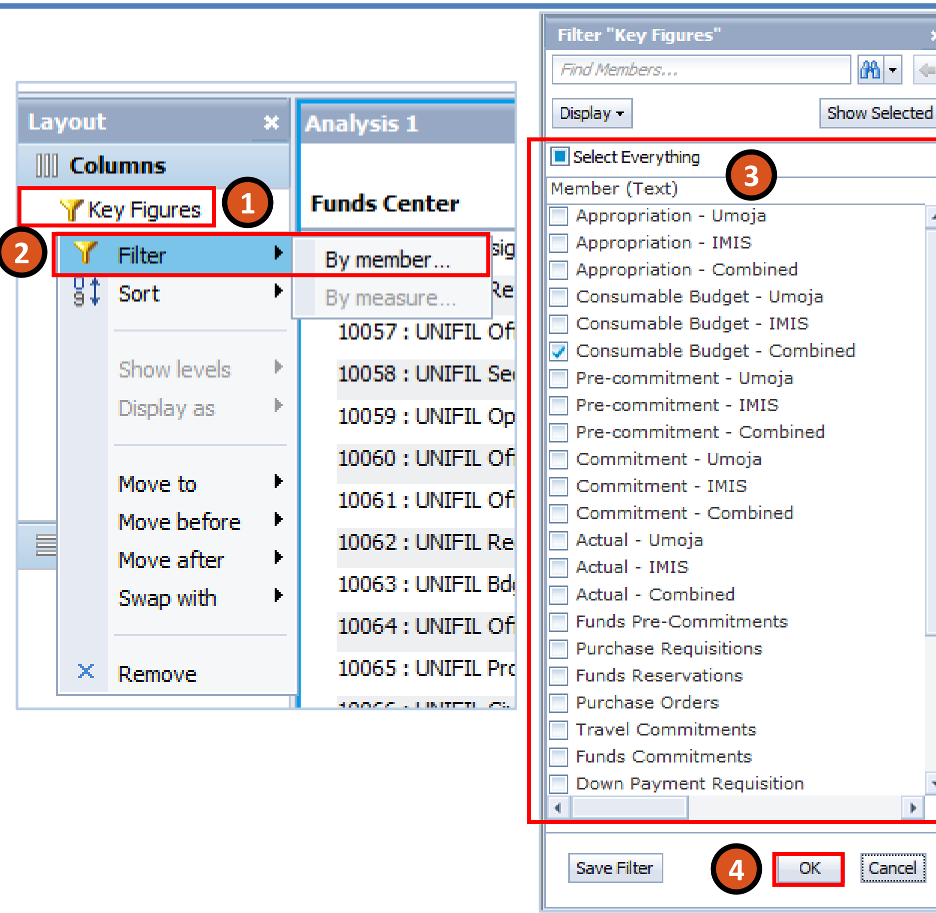
Alternatively, you can include/remove the Key Figures by using a filter:

1. Right-click the **Key Figures** label in the **Columns** section
2. Select the **Filter > By member...** list item

A **Filter "Key Figures"** pop-up window appears.

3. Check the Key Figures that you would like to include
4. Click the **OK** button

Note: This method is preferable when multiple Key Figures are selected to be included rather than just one or two.



Define a New Analysis

Define a New Analysis

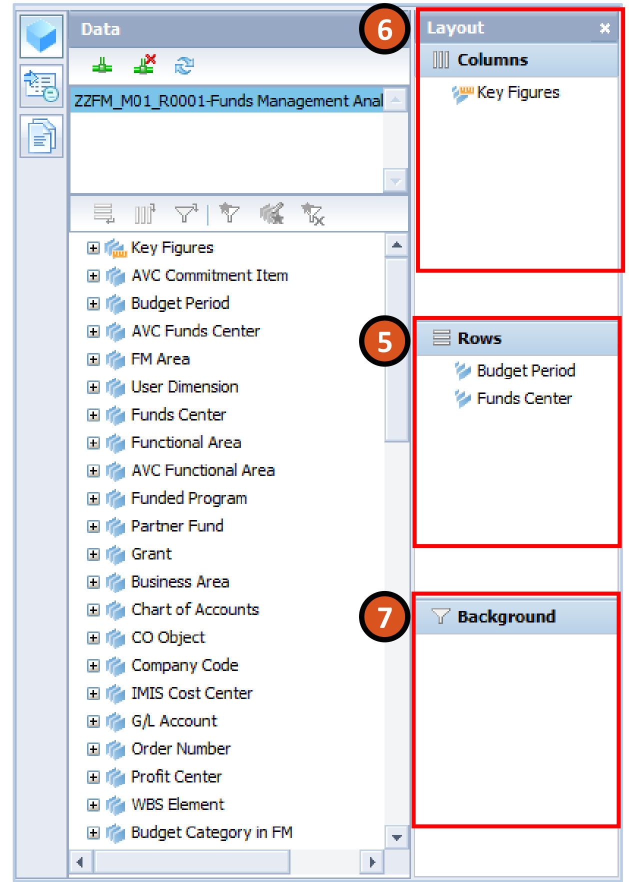
Modify an Analysis in a Pre-Built Workspace

Next, you can add Characteristics to the analysis. There are several ways to do this:

5 To add the selected Characteristic to the rows of the analysis, drag it to the **Rows** area

6 To add the selected Characteristic to the columns of the analysis, drag it to the **Columns** area

7 To add the hierarchy to the background filter, drag it to the **Background Filter** area. You will then be prompted which members of the Characteristic should be filtered



Note: While placing members of a measures dimension into an analysis, they can also be dragged directly into the rows or columns of the workspace area.

Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

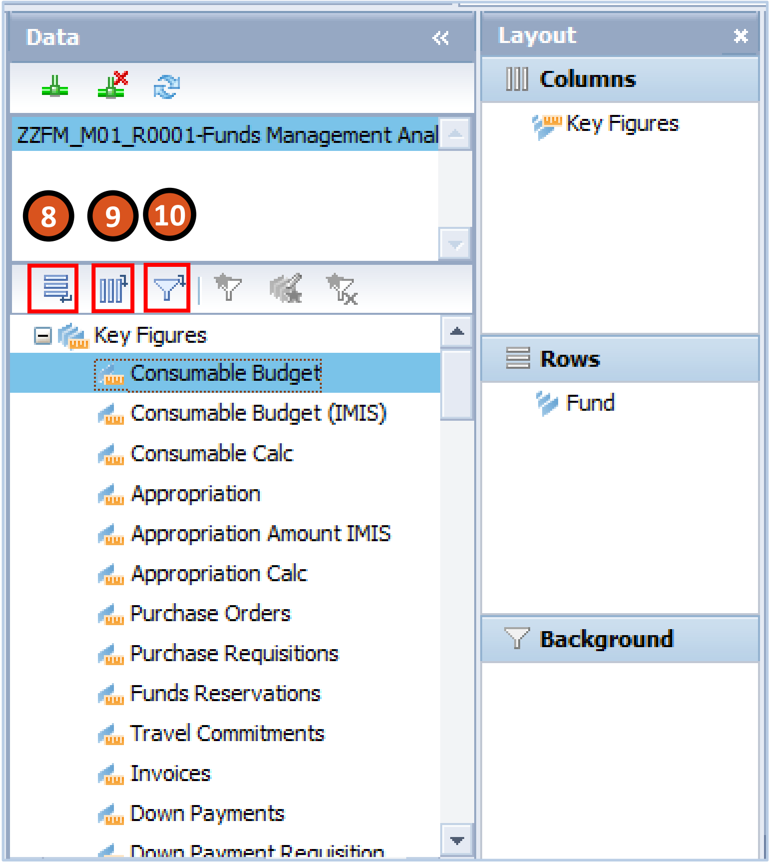
Alternatively, you can use the icons above the Metadata explorer on the **Data** panel to populate the workspace.

Select a component in the Analysis window and then click one of the following icons to add the elements to the analysis:

8 Click the **Add to Rows** icon to add the selected element to the rows on the crosstab

9 Click the **Add to Columns** icon to add the selected element to the columns on the crosstab

10 Click the **Add to Background Filter** icon to add the selected element to the background filter



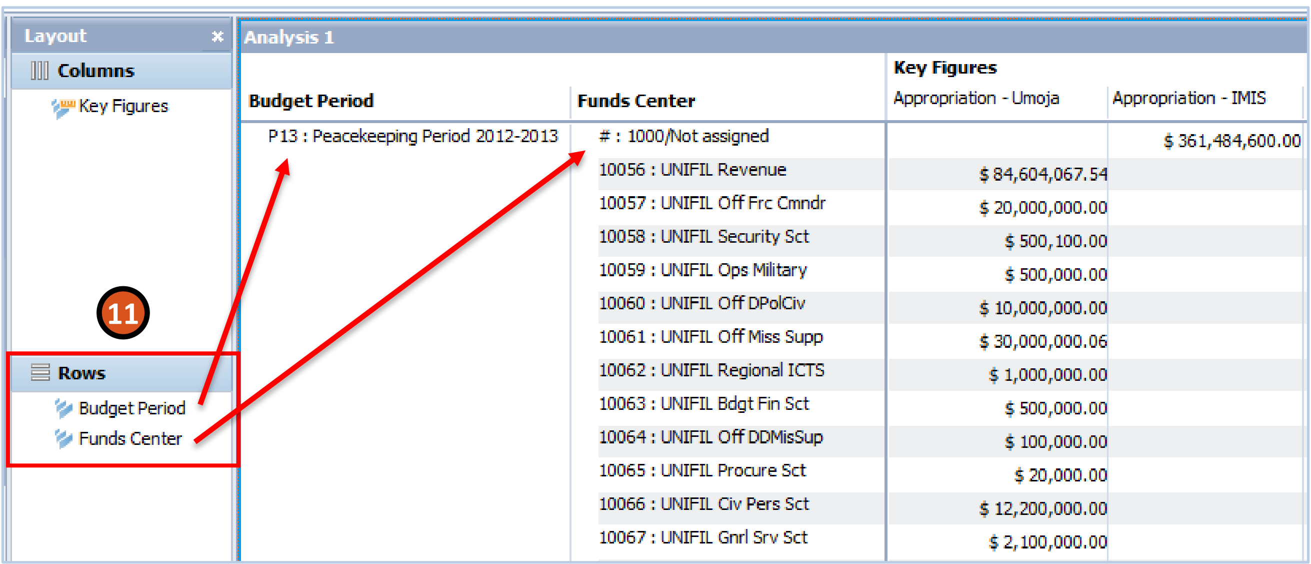
Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

Note that the order of Characteristics in the **Rows** section influences how the data is summarized. In this example, because **Funds Center** is below **Budget Period**, data is summarized by Budget Period, then Funds Center.

11 To re-order the Characteristics, simply drag them up and down in the **Rows** section.



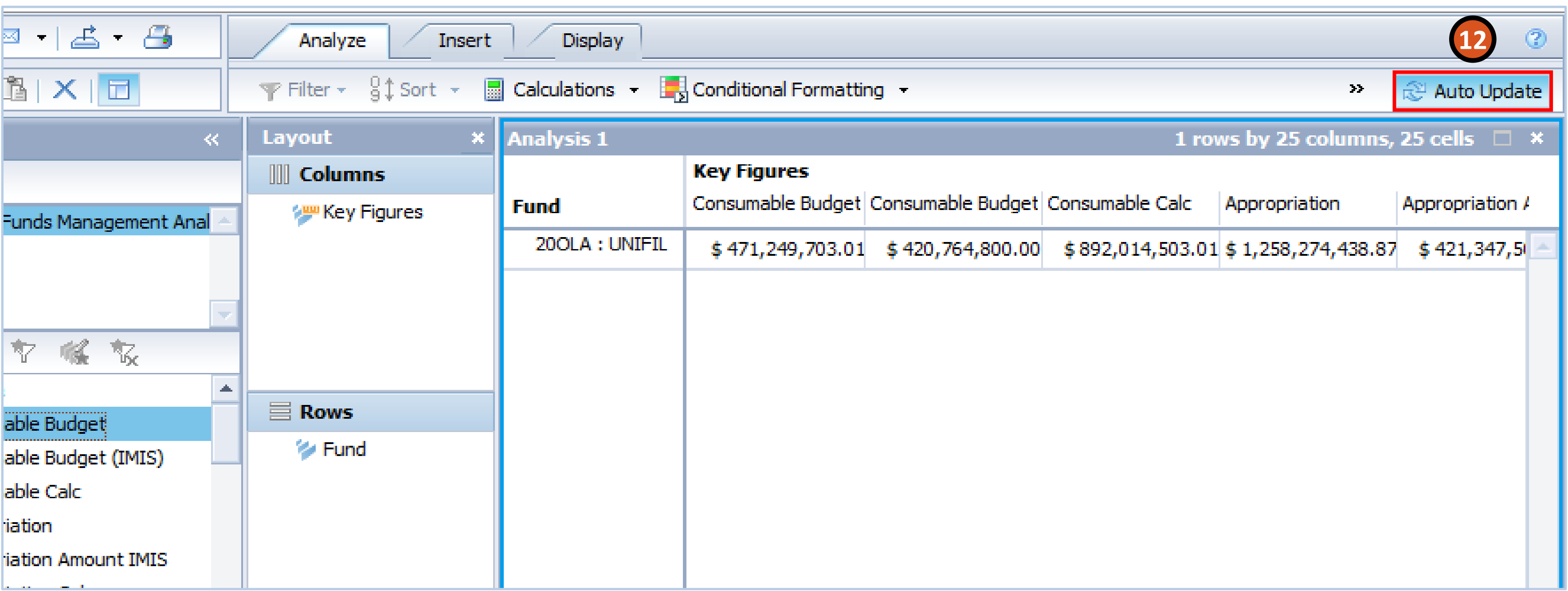
Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

If automatic updating is turned on, the crosstab and chart components update as you add hierarchy to the **Layout** panel, causing short delays.

12 Click the **Auto Update** button on the toolbar to turn off automatic updating



Define a New Analysis

Define a New Analysis | Modify an Analysis in a Pre-Built Workspace

There may be a case where the Key Figures of an analysis do not adequately capture your requirements. In these cases, you may need to perform a **calculation**.

Let's look at an example from the **Purchase Requisition Analysis Area**. In this analysis, the Key Figures include the total number of Shopping Carts that have been submitted for approval as well as the number that have been approved, by Purchasing Group.

In this example, we will create a new calculation that will show the number of Shopping Carts that have been submitted for approval <u>but not yet approved</u>. We will arrive at this number by subtracting the total approvals from the total submissions.

Analysis 1

	Key Figures		
Purchasing Group	Shopping Carts	Number of Shopping cart submissions	Number of Shopping cart approvals
50000006 : UNIFIL Proc Unit - 2	110	98	82
50000007 : UNIFIL Proc Unit - 3	48	44	40
50000008 : UNIFIL Proc Unit - 4	48	44	41
50000009 : UNIFIL HR Proc Unit	15	10	9

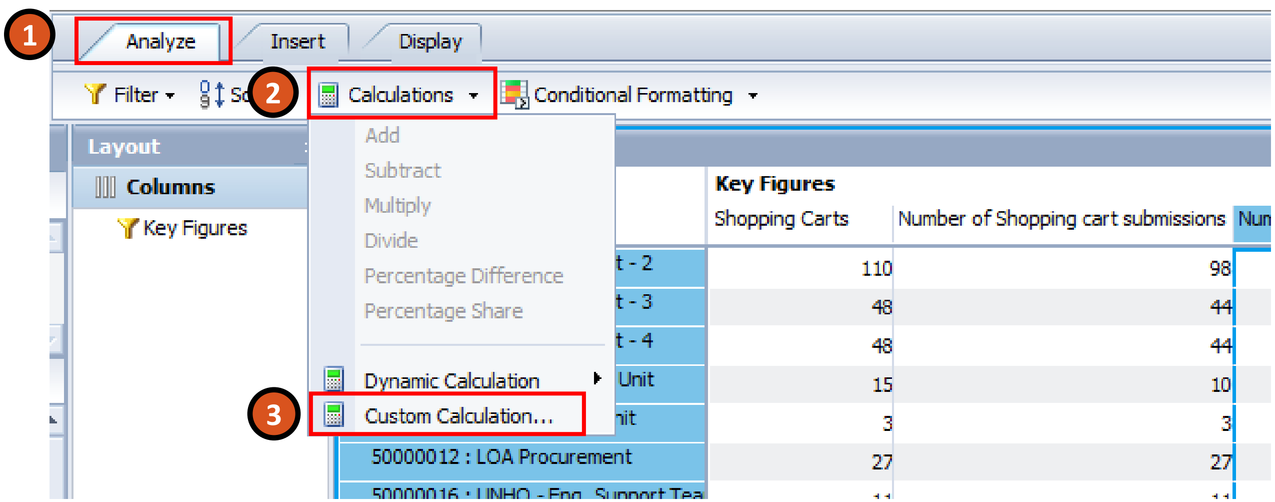
Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

To do this:

1. Click the **Analyze** tab
2. Click the arrow button next to **Calculations**
3. Click **Custom Calculation…** This will open a pop-up window.



Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

4 Enter a name for your calculation in the **Name** field

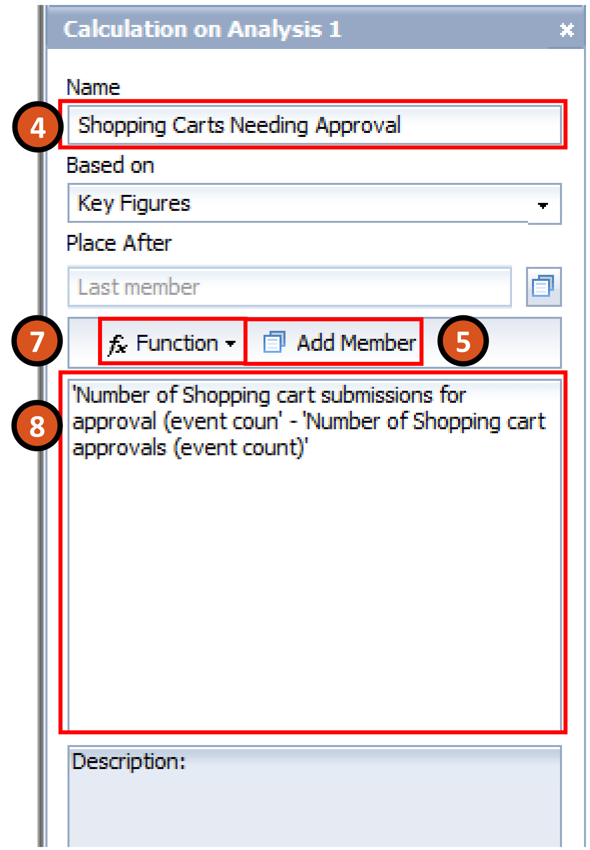
5 Click the **Add Member** button

6 In another pop-up window, select the Key Figure(s) that are to be included in your formula. This will bring the variables into the Function window.

7 Click the **Function** button to find standard functions, such as MIN, SUM, AVG, etc. (similar to Excel).

8 Otherwise, use standard operators like “+”, “-”, etc. to perform basic mathematical operations on your variables

9 Click **OK** when finished



Define a New Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

Now the new calculated Key Figure will appear as a new column. It can be dragged to another position in the analysis and acted on just as any other Key Figure.

Analysis 1

Purchasing Group	**Key Figures** Shopping Carts	Number of Shopping cart submissions	Number of Shopping cart approvals	Shopping Carts Needing Approval
50000006 : UNIFIL Proc Unit - 2	110	98	82	16
50000007 : UNIFIL Proc Unit - 3	48	44	40	4
50000008 : UNIFIL Proc Unit - 4	48	44	41	3
50000009 : UNIFIL HR Proc Unit	15	10	9	1
50000010 : UNSCOL Proc Unit	3	3	3	0
50000012 : LOA Procurement	27	27	24	3
50000016 : UNHQ - Eng. Support Tea	11	11	11	0
# : Not assigned	0	237	210	27

Modify an Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

In addition to the OLAP Analysis Areas, there are also **pre-built OLAP Workspaces** available to modify.

These are just the same as normal Analysis Areas, except the rows, columns, filters, and calculations have been already set up in advance.

Layout

Columns
- Key Figures

Rows
- Fund
- AVC Funds Center
- AVC Functional Area
- AVC Commitment Item

Analysis 1

Fund	AVC Funds Center	AVC Functiona	AVC Commitment Item	Key Figures Consumable Budget	Consumed Budget	Available Budget
20OLA : UNIFIL	10056 : UNIFIL Revenue	11BG0001 : PK	73121040 : COE FPU Freight	$ 200.00		$ 200.00
			74105010 : OE Infra AlteratPrem	$ 200.00		$ 200.00
			74106010 : OE Infra EngineeServ	$ 1,800.00		$ 1,800.00
			74121050 : OE Comm Maintenance	$ 1,800.00		$ 1,800.00
			FT20_CLASS_010 : International Staff	$ 434,782.61		$ 434,782.61
			FT20_CLASS_012 : National Staff	$ 434,782.61		$ 434,782.61
			FT20_CLASS_014 : United Nations Volun	$ 434,782.61		$ 434,782.61
			FT20_CLASS_016 : General Temp Assist	$ 434,782.61		$ 434,782.61
			FT20_CLASS_018 : Govt Provided Pers	$ 434,782.61		$ 434,782.61
			FT20_CLASS_020 : Civilian Elect Obs	$ 434,782.61		$ 434,782.61
			FT20_CLASS_025 : Consultants	$ 434,782.61	$ 15,400.00	$ 419,382.61
			FT20_CLASS_105 : Official Travel	$ 434,782.61		$ 434,782.61
			FT20_CLASS_110 : Facilities and Infra	$ 5,429,782.61	$ 4,674,835.44	$ 754,947.17
			FT20_CLASS_115 : Ground Transport	$ 434,782.61	$ 1,100.00	$ 433,682.61
			FT20_CLASS_120 : Air Transportation	$ 434,782.61		$ 434,782.61

Modify an Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

Navigating to these Pre-Built Workspaces is similar to standard Analysis Areas.

In the example FM folder to the right, there are many pre-built **WebI** (Web Intelligence) reports.

Below them is the FM Analysis Area.

Finally, there are two pre-built OLAP workspaces at the bottom of the list.

1 Double-click these to open them in a new tab.

Title ▲	Type
Consolidated and Cumulative Status of Expenditure	Web Intelligence
Consolidated and Cumulative Status of Expenditure by Month, Category a	Web Intelligence
Status of Accounts by Commitment Item	Web Intelligence
Status of Accounts by Commitment Item and Type of Expenditure	Web Intelligence
Status of Accounts with Appropriation by Commitment Item	Web Intelligence
Status of Expenditure by Commitment Item	Web Intelligence
Status of Expenditure by Commitment Item and Type of Expenditure	Web Intelligence
Status of Expenditure by Fund and Commitment Item Group	Web Intelligence
Status of Expenditure by Month and Fund	Web Intelligence
Status of Expenditure by Month, Fund and Category	Web Intelligence
Status of Expenditure for Umoja and IMIS by Commitment Item	Web Intelligence
UNLB - Status of Allotment by Commitment Item	Web Intelligence
UNLB - Status of Expenditure by Budget Line Item	Web Intelligence
ZZFM_M01_R0001-Funds Management Analysis Area	Analysis Workspace
1 ZZFM_M01_R0002-Funds Management Budget Consumption Detail	Analysis Workspace
ZZFM_M01_R0003-Funds Management Budget Consumption Summary	Analysis Workspace

Modify an Analysis

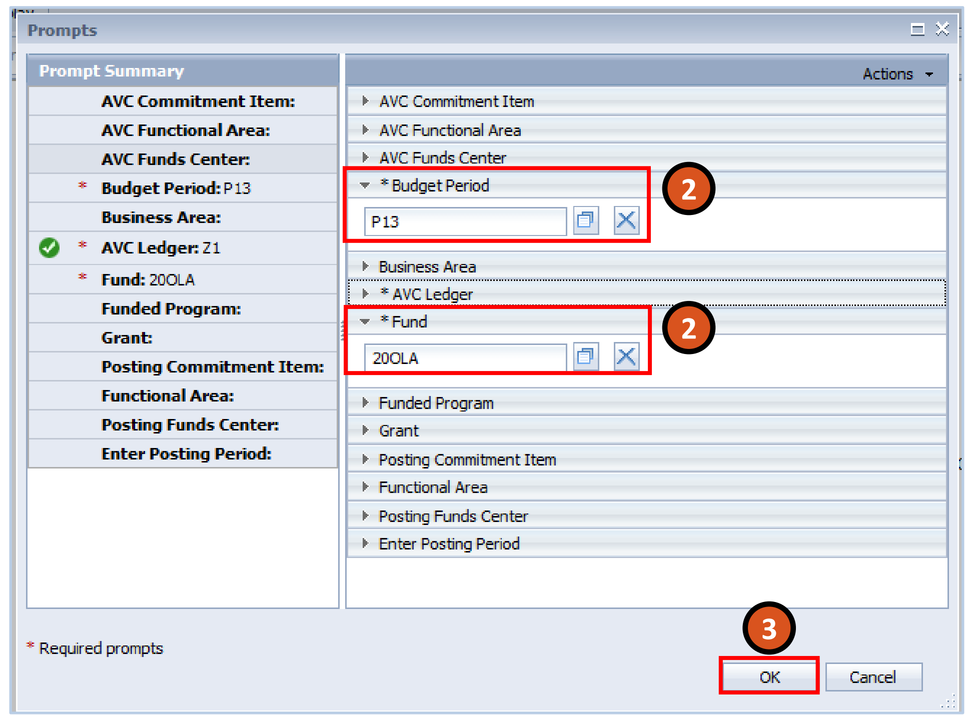
Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

When you open a Pre-Built Workspace, you may need to enter initial criteria to load the data.

2 In this case, to load the **Budget Consumption Summary** workspace, you must populate **Budget Period** and **Fund** fields. This will set up a filter on the available data using these two values

3 Click the **OK** button to proceed



Modify an Analysis

Define a New Analysis

Modify an Analysis in a Pre-Built Workspace

In the resulting Workspace, you can see that several Key Figures and characteristics have been pre-loaded into the analysis.

Just like in an Analysis Area, the columns and rows can be modified as you see fit. Later, we will discuss saving a Workspace that you've customized for later use.

Layout

Columns
- Key Figures

Rows
- Fund
- AVC Funds Center
- AVC Functional Area
- AVC Commitment Item

Analysis 1

Fund	AVC Funds Center	AVC Functiona	AVC Commitment Item	Key Figures: Consumable Budget	Consumed Budget	Available Budget
20OLA : UNIFIL	10056 : UNIFIL Revenue	11BG0001 : PK	73121040 : COE FPU Freight	$ 200.00		$ 200.00
			74105010 : OE Infra AlteratPrem	$ 200.00		$ 200.00
			74106010 : OE Infra EngineeServ	$ 1,800.00		$ 1,800.00
			74121050 : OE Comm Maintenance	$ 1,800.00		$ 1,800.00
			FT20_CLASS_010 : International Staff	$ 434,782.61		$ 434,782.61
			FT20_CLASS_012 : National Staff	$ 434,782.61		$ 434,782.61
			FT20_CLASS_014 : United Nations Volun	$ 434,782.61		$ 434,782.61
			FT20_CLASS_016 : General Temp Assist	$ 434,782.61		$ 434,782.61
			FT20_CLASS_018 : Govt Provided Pers	$ 434,782.61		$ 434,782.61
			FT20_CLASS_020 : Civilian Elect Obs	$ 434,782.61		$ 434,782.61
			FT20_CLASS_025 : Consultants	$ 434,782.61	$ 15,400.00	$ 419,382.61
			FT20_CLASS_105 : Official Travel	$ 434,782.61		$ 434,782.61
			FT20_CLASS_110 : Facilities and Infra	$ 5,429,782.61	$ 4,674,835.44	$ 754,947.17
			FT20_CLASS_115 : Ground Transport	$ 434,782.61	$ 1,100.00	$ 433,682.61
			FT20_CLASS_120 : Air Transportation	$ 434,782.61		$ 434,782.61

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Learning Checkpoint 2

In an Analysis Workspace, a calculation can be performed on which of the following?

Select the correct option:

A. Characteristics

B. Analysis Areas

C. Key Figures

D. Hierarchies

E. Attributes

Learning Checkpoint 2

In an Analysis Workspace, a calculation can be performed on which of the following?

Select the correct option:

A. Characteristics

B. Analysis Areas

C. Key Figures

D. Hierarchies

E. Attributes

Option C is the correct answer. Key Figures are numerical values, so they can have calculations performed on them.

Simulation Activities

Throughout this training, users will have the opportunity to conduct activities in the form of simulations. Simulations are interactive “recordings” of the Umoja system used to help facilitate a hands-on learning experience. The simulation links are provided on the corresponding activity slides.

Users can access simulations in three different modes:

- **Show me**: Users view a video of an entire transaction being conducted
- **Let’s do it together**: Users will be prompted to input data at key points during the transaction (recommended)
- **Try it**: Users can complete an entire transaction on their own, with no additional instructions provided

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Activity 1

Transaction Name: Define a New Analysis and add Calculation

Guide me: Define a New Analysis and add Calculation

Activity 2

Transaction Name: Open and Modify an Existing Workspace

Guide me: Open and Modify an Existing Workspace

Module 2 Summary

The key points covered in this course are listed below:

- An analysis can be defined by populating a crosstab with the data options that are to be included. It can also be defined using a chart component
- The three axes in the crosstab are row axis, column axis and background filter or slice axis
- The two hierarchies in the crosstab are row and column hierarchies and background filter hierarchies

Agenda

Course Introduction
Module 1: Analysis Workspaces
Module 2: Define and Modify an Analysis
Module 3: Add a Sub-analysis and Chart
Module 4: Save, Send and Print an Analysis
Module 5: Customizing WebI Reports
Course Summary
Course Assessment
Course Survey

Module 3 Objectives

After completing this module, you will be able to:

- Add a sub-analysis
- Describe charts in analysis
- Add a chart
- Change a chart type
- Customize a chart
- Explain the Chart Range Slider and Conditional Formatting functionalities

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Create a Sub-Analysis

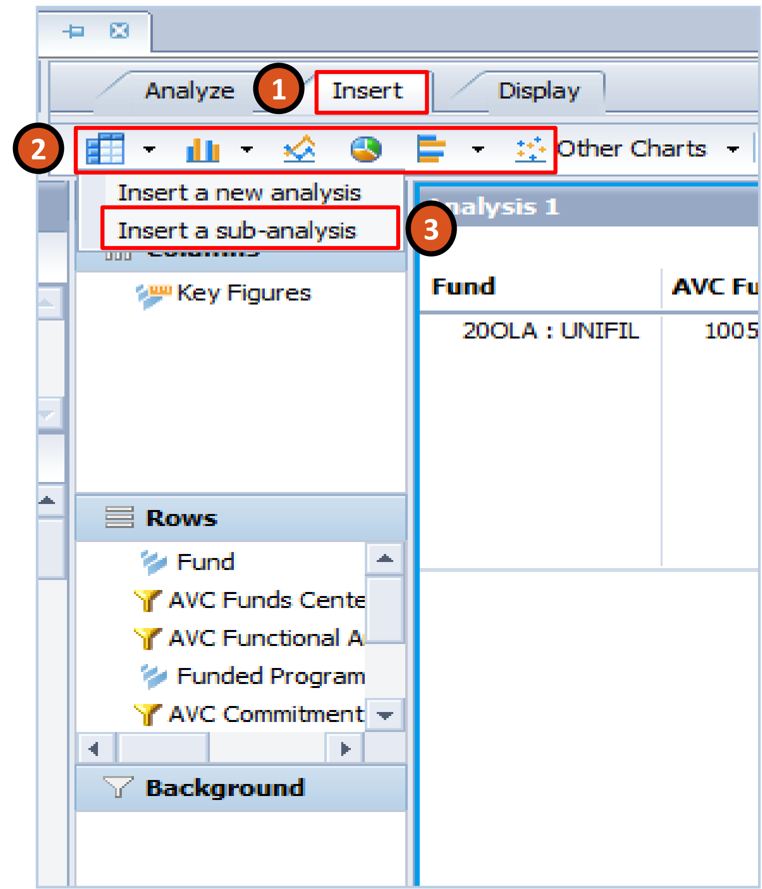
Create a Sub-Analysis | Delete an Analysis

When an Analysis Area is opened, an analysis is automatically created by default. For some Analysis Area reports, only one analysis is required. However, in other cases, an additional sub-analysis may be required.

A sub-analysis is linked to the original analysis. However, the new component from the original can be unlinked, creating a separate analysis.

The steps to create a sub-analysis are as follows:

1. Click the **Insert** tab at the top of the screen
2. Click the relevant **Chart** icon
3. Select **Insert a sub-analysis**



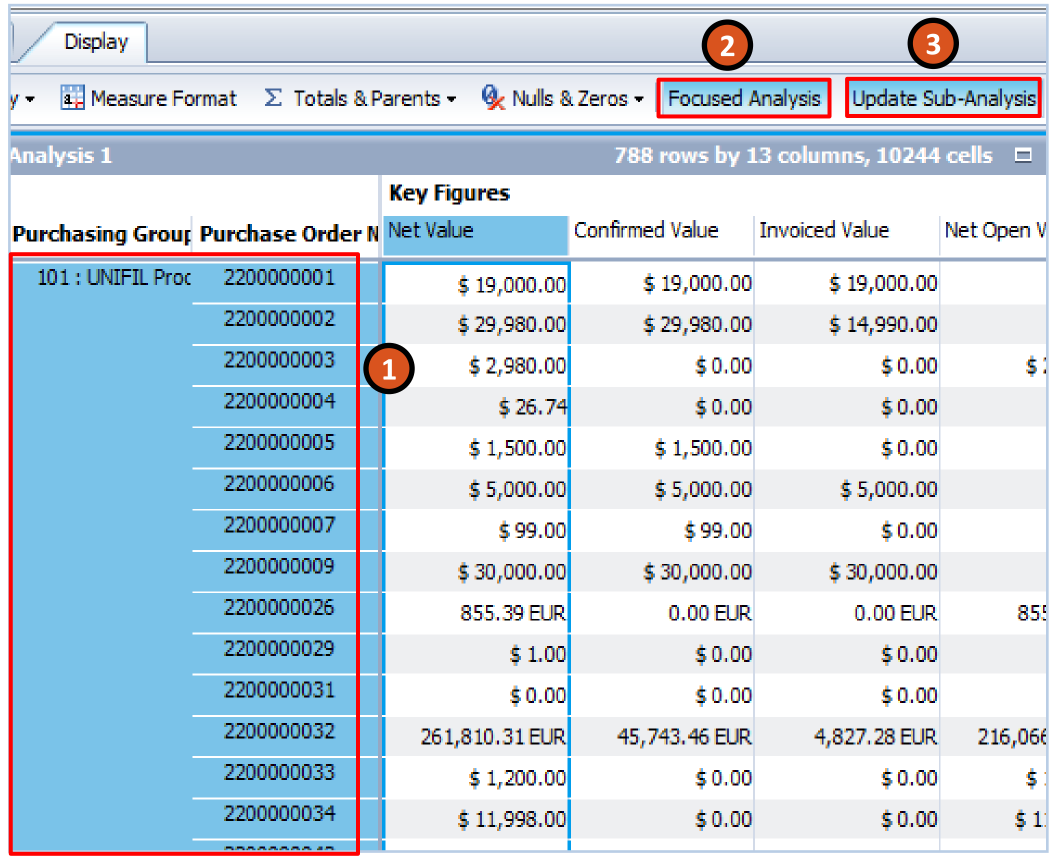
Create a Sub-Analysis

Create a Sub-Analysis

Delete an Analysis

A new window will open next to the original analysis. To focus the sub-analysis on a specific set of data, perform the following steps:

1. Select one or more rows or columns in the original analysis
2. Click the **Focused Analysis** button in the **Display** tab. This limits the sub-analysis to only the selected data in the original analysis
3. Click the **Update Sub-Analysis** button, if you do not want the sub-analysis to keep updating based on these selections



Purchasing Group	Purchase Order N	Net Value	Confirmed Value	Invoiced Value	Net Open V
101 : UNIFIL Proc	2200000001	$ 19,000.00	$ 19,000.00	$ 19,000.00	
	2200000002	$ 29,980.00	$ 29,980.00	$ 14,990.00	
	2200000003	$ 2,980.00	$ 0.00	$ 0.00	$
	2200000004	$ 26.74	$ 0.00	$ 0.00	
	2200000005	$ 1,500.00	$ 1,500.00	$ 0.00	
	2200000006	$ 5,000.00	$ 5,000.00	$ 5,000.00	
	2200000007	$ 99.00	$ 99.00	$ 0.00	
	2200000009	$ 30,000.00	$ 30,000.00	$ 30,000.00	
	2200000026	855.39 EUR	0.00 EUR	0.00 EUR	855
	2200000029	$ 1.00	$ 0.00	$ 0.00	
	2200000031	$ 0.00	$ 0.00	$ 0.00	
	2200000032	261,810.31 EUR	45,743.46 EUR	4,827.28 EUR	216,06
	2200000033	$ 1,200.00	$ 0.00	$ 0.00	$
	2200000034	$ 11,998.00	$ 0.00	$ 0.00	$ 1

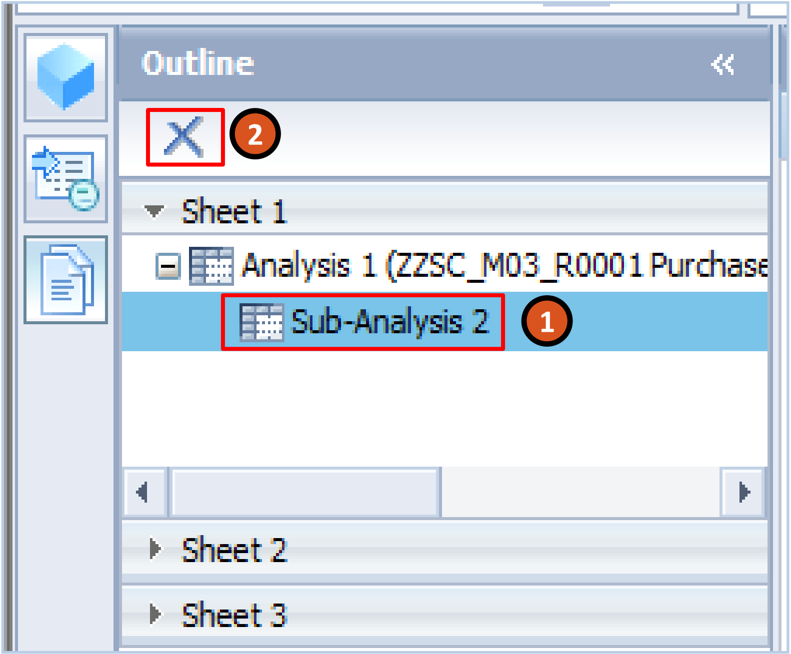
Delete an Analysis

Create a Sub-Analysis

Delete an Analysis

The steps to delete an analysis are as follows:

1. Select the analysis from the **Outline** panel
2. Click the **Delete** icon



Overview of Charts in Analysis

Charts are added to workspaces to present data graphically and are used to indicate irregularities or trends in data. Several chart types available to visualize data are as follows:

- Clustered bar and column charts
- Stacked bar and column charts
- 100% stacked bar and column charts
- 3D column charts
- Multi-line charts
- Pie charts
- Scatter charts
- Box plot charts
- Bubble charts
- Radar charts

Overview of Charts in Analysis

Chart and crosstab components are linked to analyses. A common analysis scenario is to first create a crosstab and then add a chart as a sub-analysis linked to the main analysis. The crosstab and chart display the same data and both get updated simultaneously whenever changes are made.

Focused analyses are used to display only a subset of the data in the main analysis. For example, you can use a crosstab for your main analysis and use a chart for the focused sub-analysis. As a result, when you select data in the crosstab, the chart displays only the selected subset of data.

This module will cover the following activities related to charts:

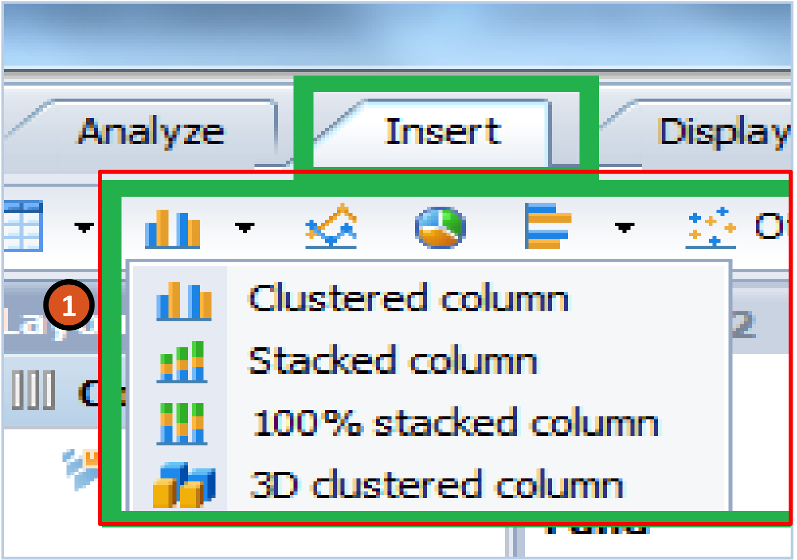
Add a Chart	Change a Chart Type	Customize a Chart

Add a Chart

Add a Chart | Change a Chart Type | Customize a Chart

The steps to add a chart to the Analysis window are as follows:

1. Click the required **Chart** icon or drag the **Chart** icon to the **Analysis** window to add a chart



The chart is added below or to the right of the existing components in the sheet.

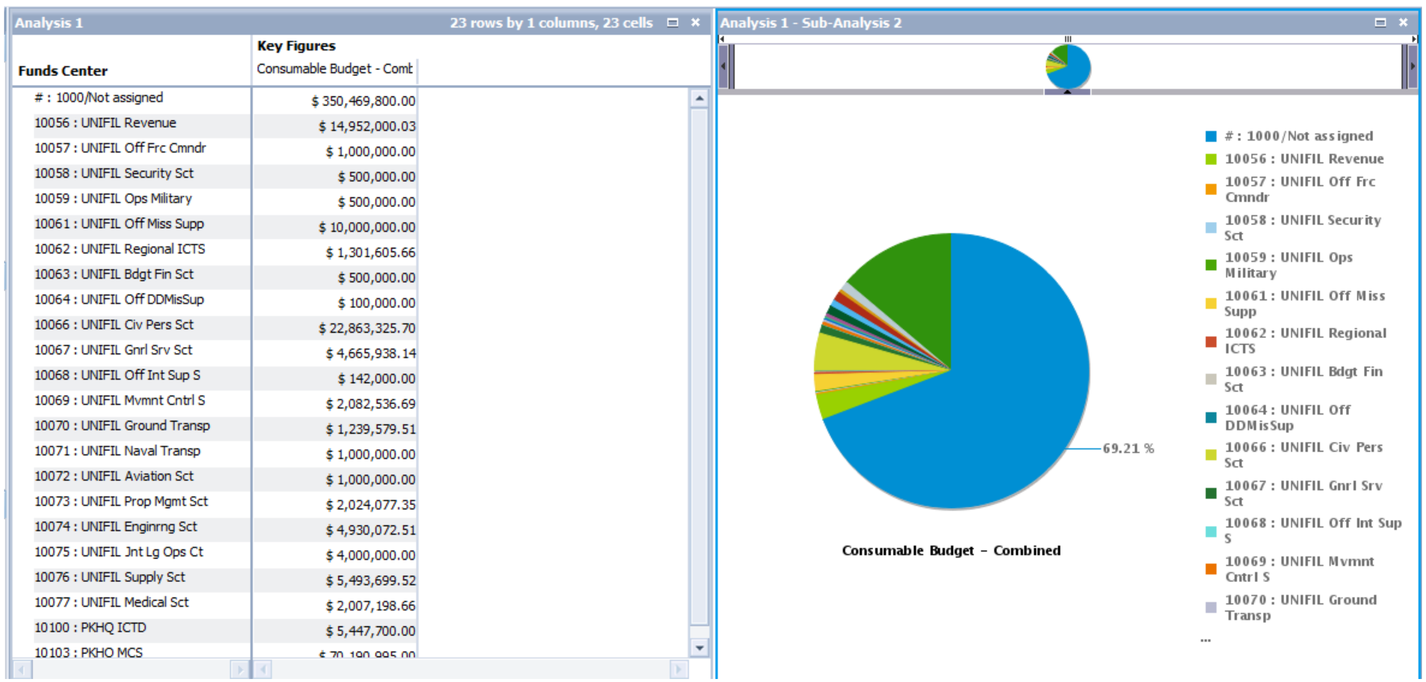
Note: Some chart icons represent families of individual chart types. For example, the column chart family includes charts such as stacked column and 3D column.

Add a Chart

Add a Chart | Change a Chart Type | Customize a Chart

When you add a chart to a sheet, the chart is added as a sub-analysis linked to the selected analysis.

Therefore, the chart is automatically populated with data that has been previously defined in the analysis.

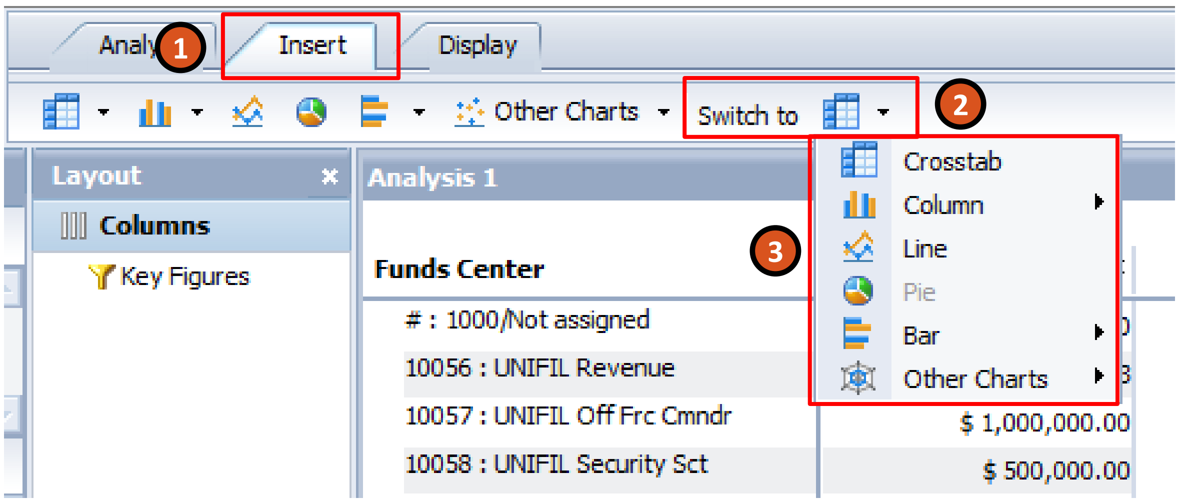


Change a Chart Type

Add a Chart | **Change a Chart Type** | Customize a Chart

The steps to change a chart type are as follows:

1. Select the required chart and click the **Insert** tab
2. Click the **Switch to** drop-down list
3. Select the chart type that you want to switch to from the displayed list. Alternatively, right-click the chart graphic and select the chart type to be used

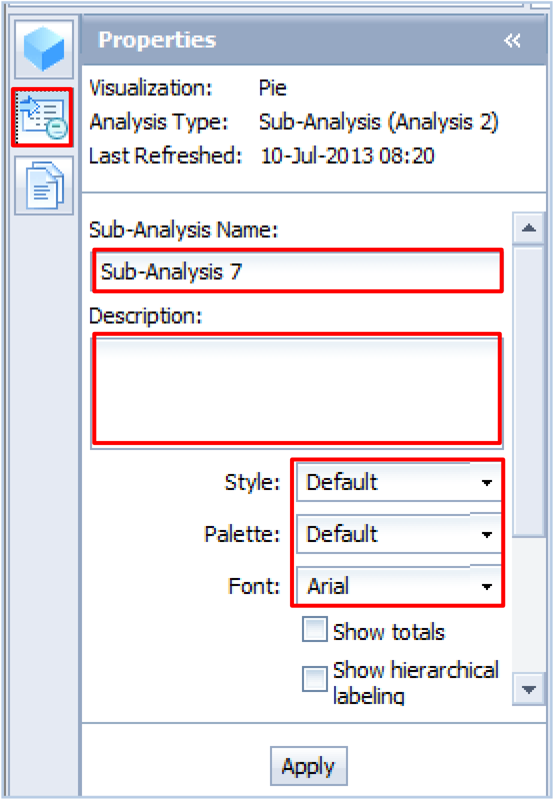


Customize a Chart

Add a Chart | Change a Chart Type | **Customize a Chart**

Multiple options available for customizing a chart on the **Properties** tab are as follows:

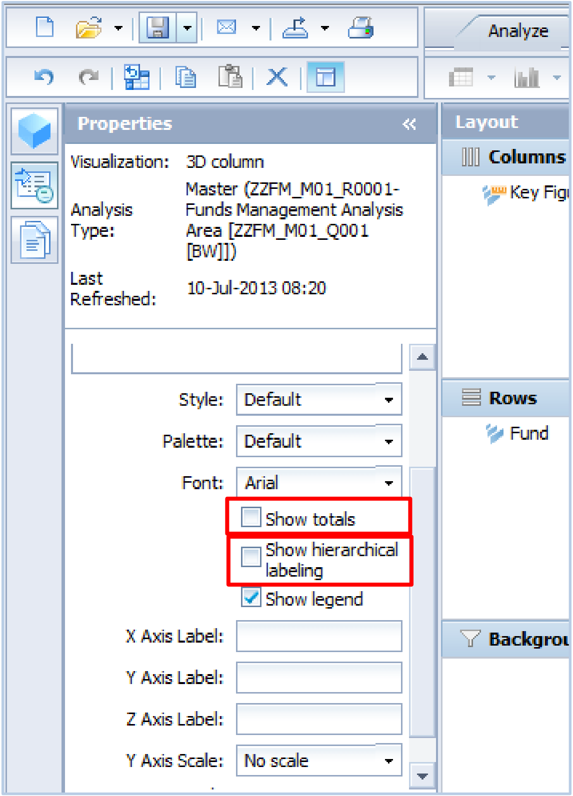
- **Sub-Analysis Name**: The name that you type here appears on the chart's title bar and is used to identify the chart on the **Outline** panel
- **Description**: This text is included when you print the chart
- **Style, Palette and Font**: Select from different options to modify the look and feel of the chart



Customize a Chart

Add a Chart | Change a Chart Type | **Customize a Chart**

- **Show totals**: If you have totals displayed on the crosstab, click this check box to show these totals in the linked chart
- **Show hierarchical labelling**: Click this check box to show the parent-child relationships between the members on the chart



Customize a Chart

Add a Chart | Change a Chart Type | **Customize a Chart**

- **Show legend**: This toggles the display of the chart legend
- **X Axis Label, Y Axis Label** and **Z Axis Label**: Type labels in any of these following fields to add labels to the respective axis
- **Y Axis Scale**: Used to modify the scale used on the Y Axis of the Chart
- **Y Axis Symbol**: Type a symbol to use for the Y Axis Scale Symbol property

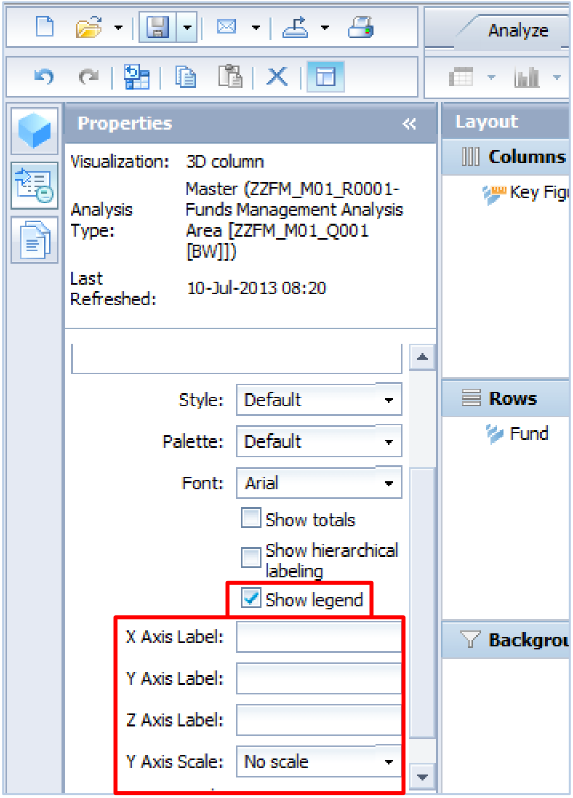


Chart Range Slider

While working with large data sets, displaying all the data on a chart makes it difficult to distinguish between individual risers or lines on the chart. In such a scenario, analysis adds a range slider to the chart component to help read the data better.

The chart range slider allows you to pick and choose which data elements to display in the chart for better visibility.

For example, in the chart to the right, one bar is much longer than all the others, rendering the chart difficult to read.

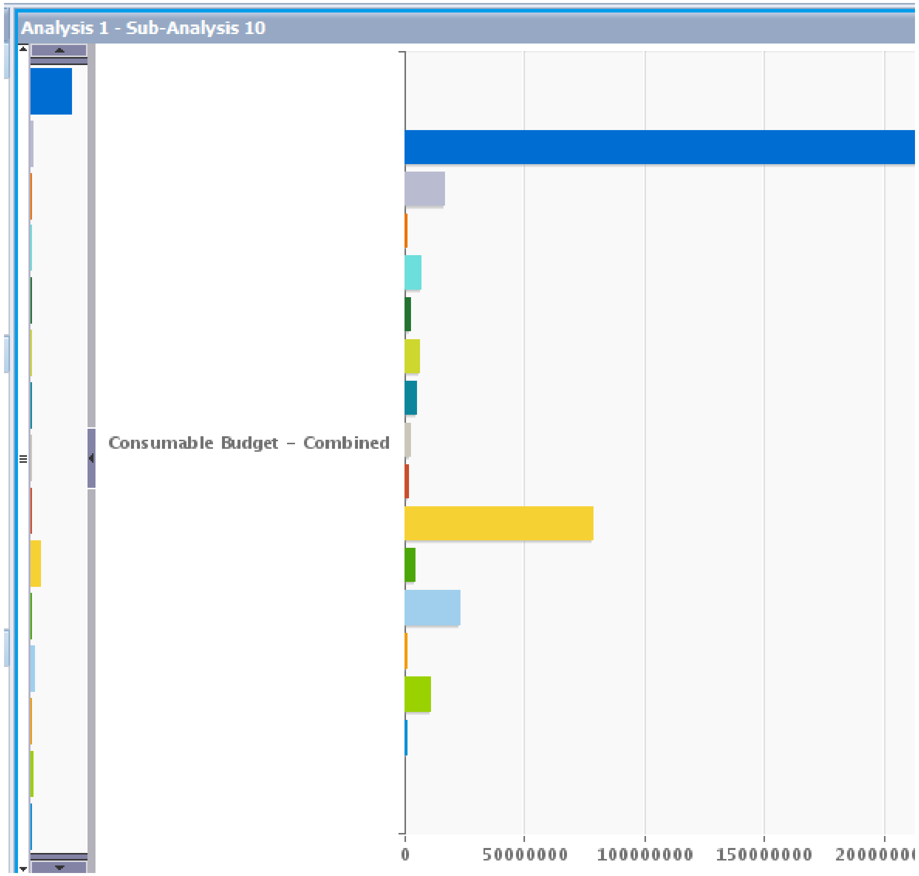
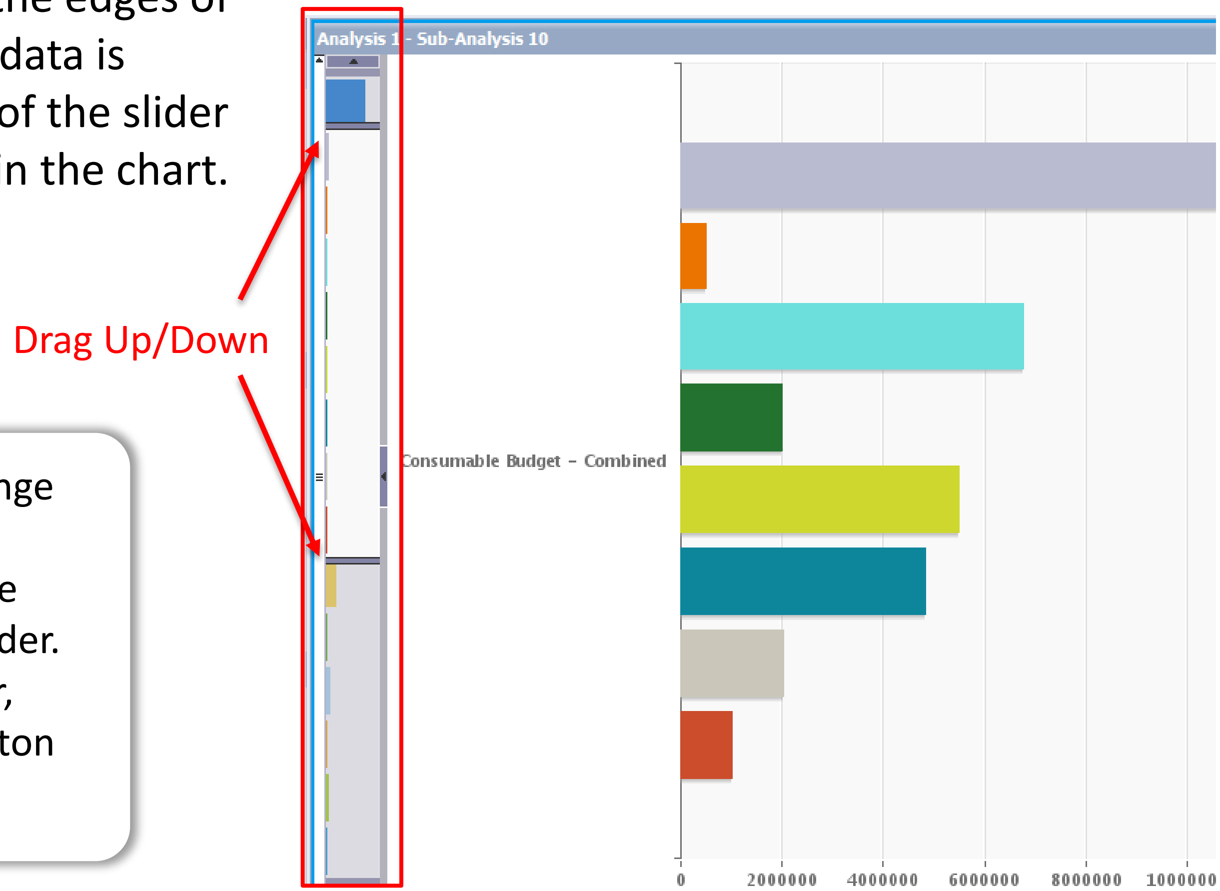


Chart Range Slider

With the chart slider, you can change the range of the chart to view only a subset of the data in the analysis.

To do this, drag the bars at the edges of the sliders to modify which data is displayed. Only the section of the slider shown in white will display in the chart.

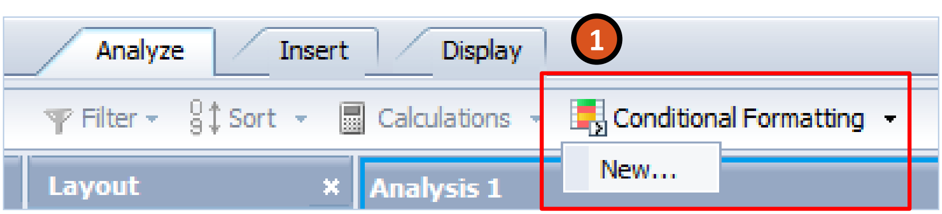


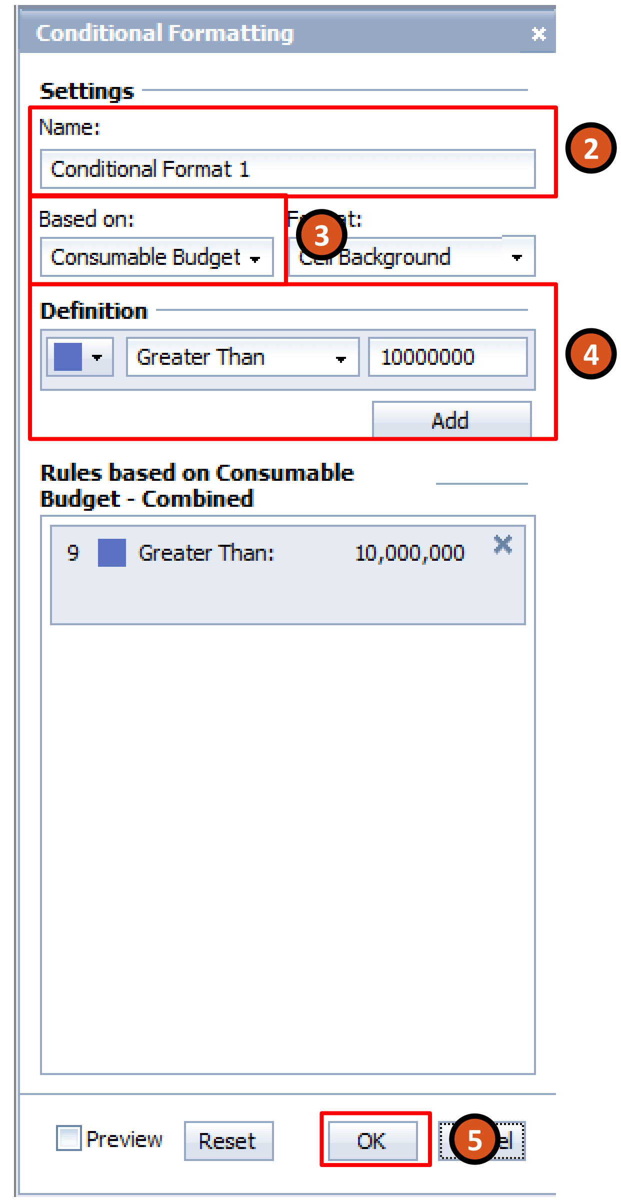
Note: You can hide the range slider by clicking the **hide/restore button** at the right edge of the range slider. To restore the range slider, click the **hide/restore** button again.

Apply Conditional Formatting

The steps to apply conditional formatting are as follows:

1. Select **Analyze > Conditional Formatting** on the toolbar. Alternatively, you can right-click the selected cells and choose **Conditional Formatting > New**
2. Type a name for the conditional format on the **Conditional Formatting** panel.
3. Select a Key Measure in the **Based on** field.
4. Define the rule for the conditional formatting and click the **Add** button
5. Click **OK**





Learning Checkpoint 3

When you add a chart to a sheet, the chart is added as a __________ linked to the selected analysis.

Fill in the blanks with the correct option.

A. Sub-analysis
B. Crosstab
C. Focused analysis
D. Data set

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Learning Checkpoint 3

When you add a chart to a sheet, the chart is added as a __________ linked to the selected analysis.

Fill in the blanks with the correct option.

A. **Sub-analysis**

B. Crosstab

C. Focused analysis

D. Data set

Option A is the correct answer. When you add a chart to a sheet, the chart is added as a sub-analysis linked to the selected analysis.

Activity 3

Transaction Name: Add a Chart to a Workspace

Guide me: [Add a Chart to a Workspace]

Module 3 Summary

The key points covered in this module are listed below:

- A sub-analysis is linked to the original analysis
- Charts are added to workspaces to present data graphically and are used to indicate irregularities or trends in data
- Several chart types are available to visualize data
- A chart can be customized to modify the display or functional features
- The chart range slider allows you select a portion of the data set and view it in an expanded form in the main chart graphic
- A row, column or a group of cells can be selected to apply conditional formatting

Agenda

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Module 1: Analysis Workspaces
Module 2: Define and Modify an Analysis
Module 3: Add a Sub-analysis and Chart
Module 4: Save, Send and Print an Analysis
Module 5: Customizing WebI Reports
Course Summary
Course Assessment
Course Survey

Module 4 Objectives

After completing this module, you will be able to:

- Save analysis workspaces for sharing with others
- Send an analysis workspace
- Print BI reports and files

Overview

This module will cover the following activities:

- Save an Analysis Workspace to Share with Others
- Send an Analysis Workspace to Another User
- Print BI Reports and Files

Save an Analysis Workspace

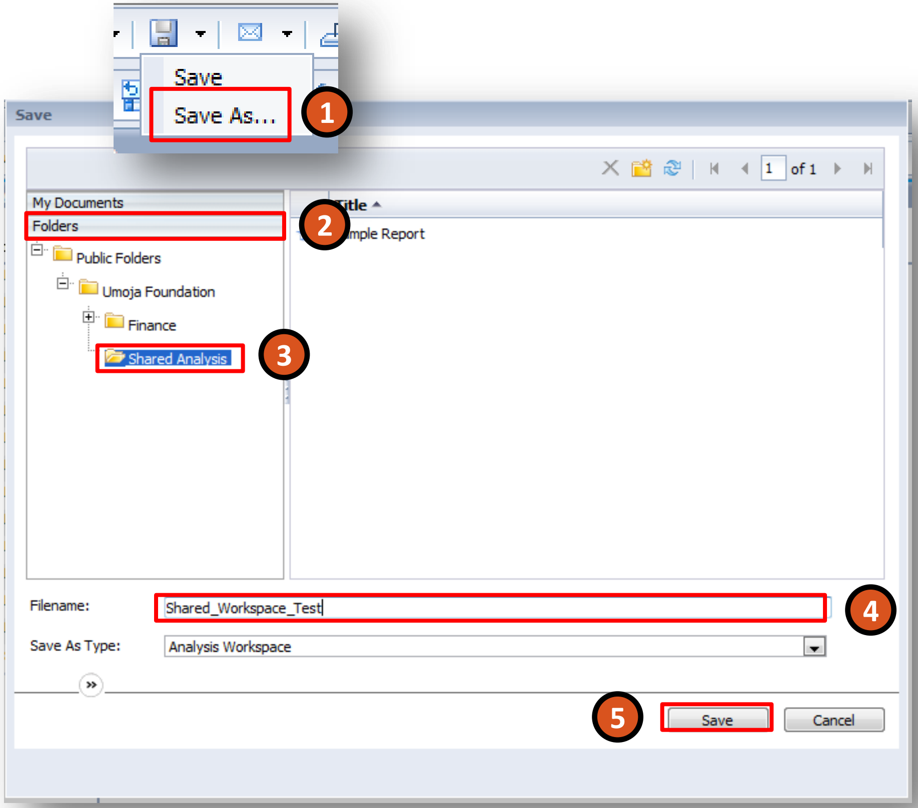
Save an Analysis Workspace to Share with Others

Send an Analysis Workspace to Another User

Print BI Reports and Files

To save an Analysis Workspace in a location where others can access it, you save the workspace to a public folder in the BI platform repository. To do this:

1. Click the arrow beside the **Save** button on the toolbar and select **Save As**
2. Click the **Folders** bar, under My Documents
3. Within the **Umoja Foundation** folder, click the **Shared Analysis** folder. All BI Power users have access to this folder
4. Type a filename for your workspace in the **Filename** field
5. Click the **Save** button



Send an Analysis Workspace to Another User

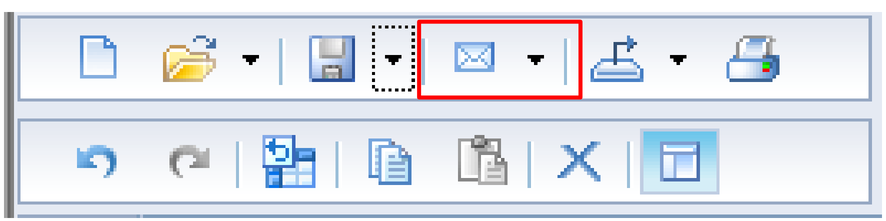
Save an Analysis Workspace to Share with Others

Send an Analysis Workspace to Another User

Print BI Reports and Files

The Umoja BI portal allows you to send a workspace to another BI user or to an e-mail recipient.

If you have any unsaved changes in your workspace, the workspace is first saved with a unique name in your **Favorites** folder. You can then send the saved workspace to an email recipient using the **Email** button:



Print BI Reports and Files

Save an Analysis Workspace to Share with Others

Send an Analysis Workspace to Another User

Print BI Reports and Files

You can export workspaces to PDF files, which can be printed or sent to colleagues.

After completing the analysis, findings might have to be shared by exporting the workspace to a PDF file or by printing the data. Using the printing capability in analysis, you can perform the following activities:

- **Print Data** – Choose to print raw data instead of the crosstab or chart representations of the data. When the data printing option is chosen, all the filtered data in an analysis is printed instead of the data visible on the screen
- **Print Sheet** – When a sheet is printed, all components on the sheet are printed together, as they appear on the screen

Note: Analyses and charts are printed as they appear on screen with minor exceptions. Text that does not fit within the column widths may be truncated and appear differently from how they are displayed on the screen.

Print BI Reports and Files

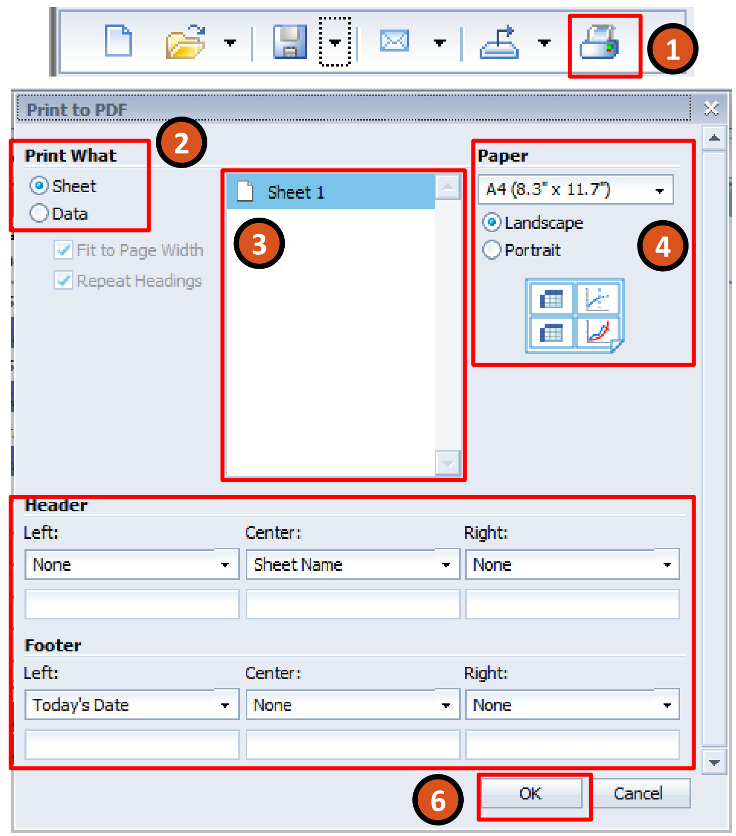
Save an Analysis Workspace to Share with Others

Send an Analysis Workspace to Another User

Print BI Reports and Files

The steps to export BI reports and files to PDF are as follows:

1. Click the **Print** icon
2. Select **Sheet** or **Data**
3. Select one or more sheets to be printed if **Print a sheet** is chosen. Press the **Ctrl** or **Shift** key to select multiple sheets
4. Select a **Paper Size** and **Print Orientation**
5. Choose the information fields you want to display in the header and footer
6. Click the **OK** button



Learning Checkpoint 4

For other users to be able to access a Workspace that you have saved, it must be saved into which folder?

Select the correct response.

A. My Documents
B. My Favorites
C. Public Umoja Analysis
D. Shared Analysis

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Learning Checkpoint 4

For other users to be able to access a Workspace that you have saved, it must be saved into which folder?

Select the correct response.

A. My Documents

B. My Favorites

C. Public Umoja Analysis

D. Shared Analysis

Options D is the correct answer. Only the Shared Analysis folder is visible to all BI Power Users.

Activity 4

Transaction Name: Save a Workspace and Print as PDF

Guide me: [Save a Workspace and Print as PDF]

Module 4 Summary

The key points covered in this course are listed below:

- Workspaces can be saved to a public folder “Shared Analysis” in the BI platform repository to share with other analysts and end users
- The Umoja BI portal allows you to send a workspace to another BI user or to an e-mail recipient
- In case of unsaved changes in the workspace, the workspace is first saved with a unique name in the Favorites folder, and then sent to a BI User or e-mail recipient
- The workspaces can be exported to PDF files, which can be printed or sent to colleagues

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Module 5 Objectives

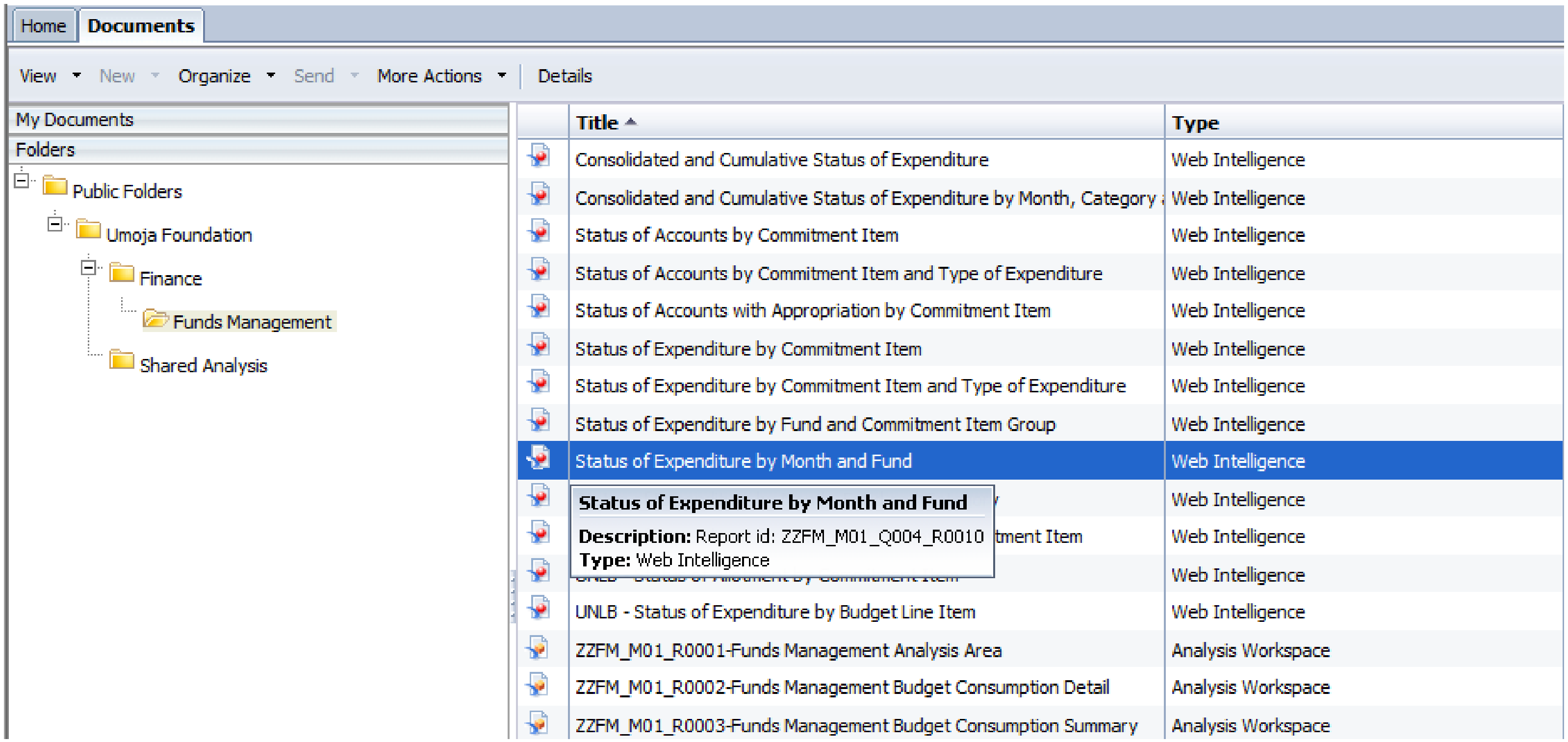
After completing this module, you will be able to:

- Customize an existing WebI report
- Add a calculation to a WebI report
- Save an edited WebI report to a private or shared folder

Web Intelligence Reports

To review, Web Intelligence (WebI) reports are pre-formatted standard reports available to all BI users.

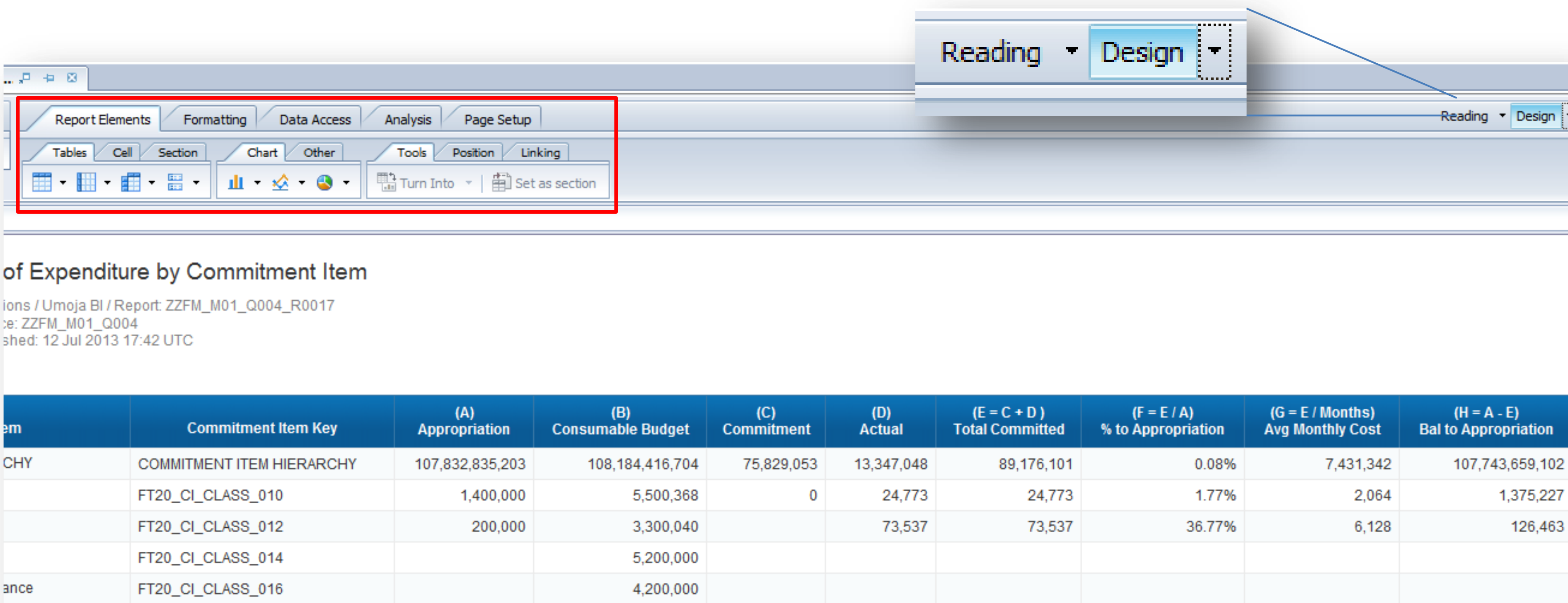
While most BI users are only able to display WebI reports, BI Power Users can edit pre-existing reports and save new WebI reports in either a private or shared folder.



Edit WebI Report

When you open a WebI report, it will appear in **Reading** mode, just as it does for all BI users.

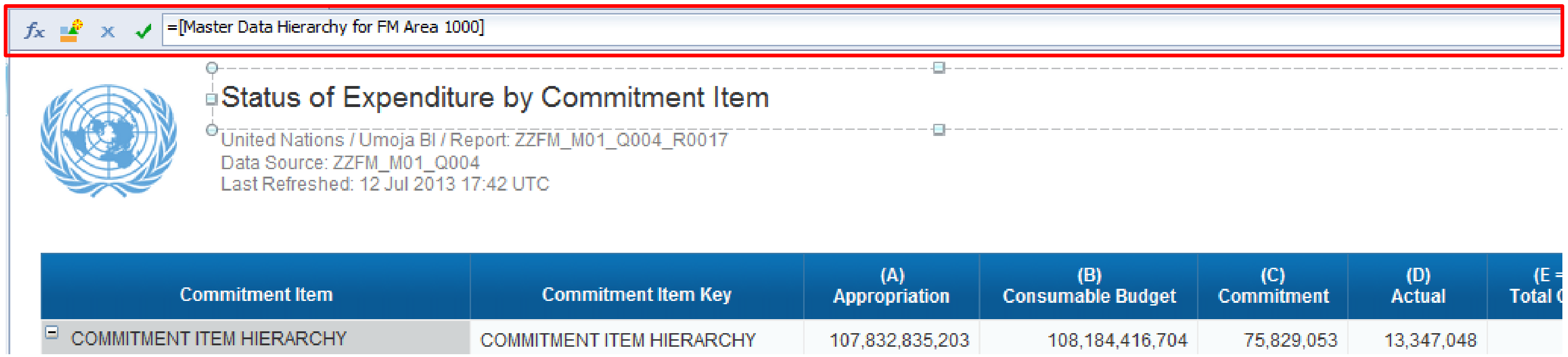
To enable editing features, you must click the **Design** button in the top-right corner of the screen. This will display the formatting and data tabs at the top of the screen.



Edit WebI Report

One of the most important things to note about the interface is that most components within a WebI report can be edited. This includes all formatting, text boxes, graphics, headings, etc.

Secondly, most of these components are edited using the **Formula Bar**.



Formulas entered here follow similar rules to Excel. For instance, if you wanted to name a column **Column A**, you would type: *="Column A"*

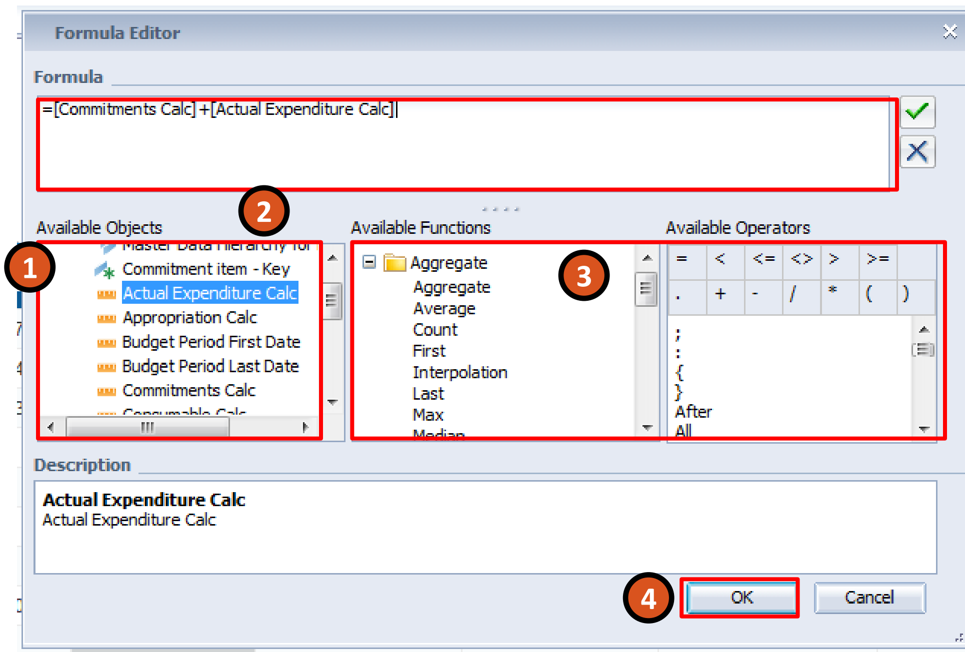
Similarly, all calculations on Key Figures is performed in the Formula Bar as well.

Edit Webl Report

To create a new calculation:

- Highlight a column in the report and click the **Formula** button. Alternatively, right-click the column and click **Edit Formula…**

1. Select a Key Figure or other variable from the **Available Objects** window
2. Double click the Key Figure to add it to the Formula window.
3. Build the calculation using functions and operators available below.
4. Click the **OK** button

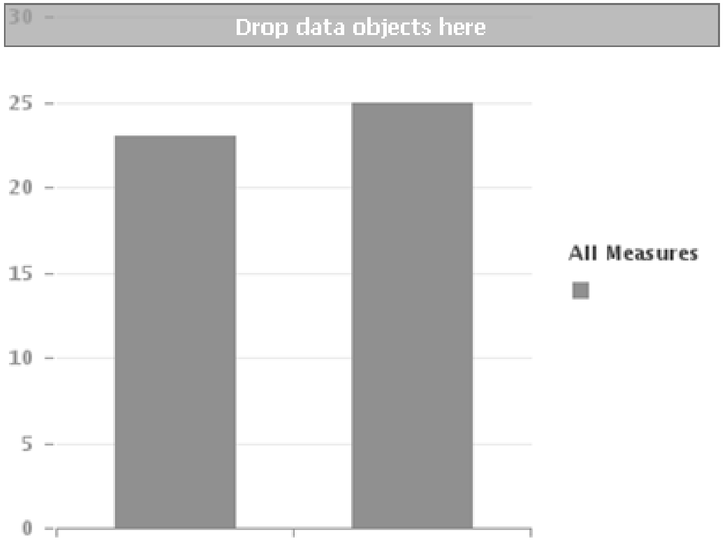


Edit WebI Report

Creating charts is very similar to OLAP Analysis Areas. To do this:

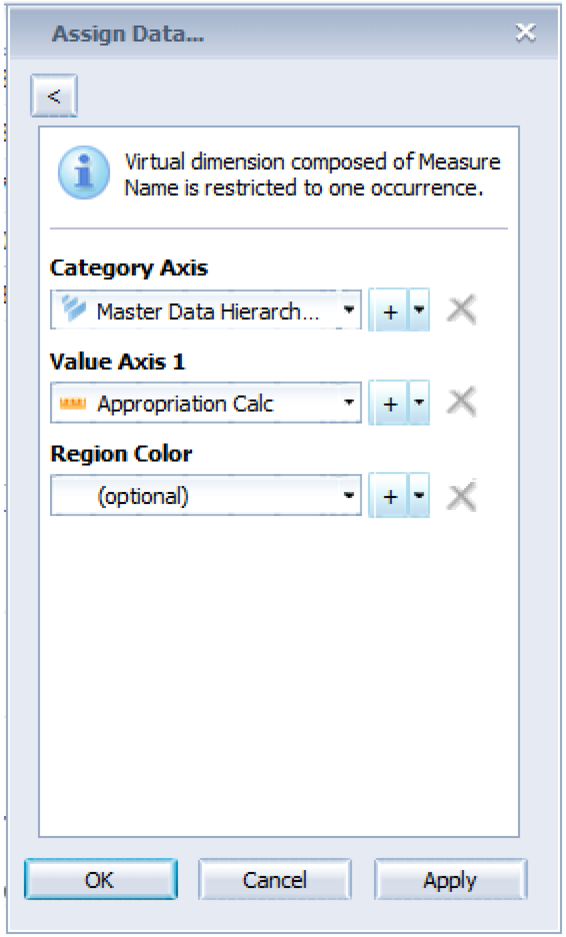
- Under the **Report Elements** tab, click one of the chart type buttons under the **Chart** tab

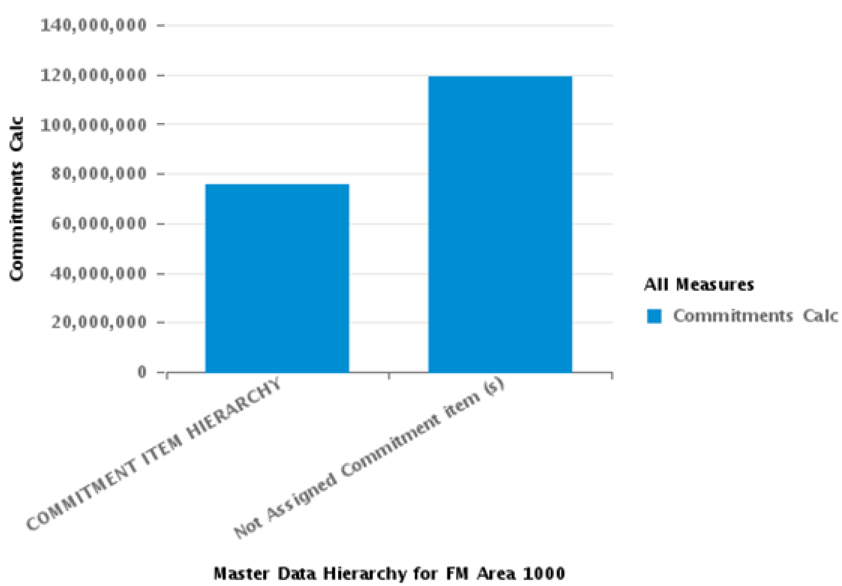
- Your cursor will then turn into a “+” sign and you can choose where on the screen to insert a new chart. The chart will then appear with no data assigned.



Edit WebI Report

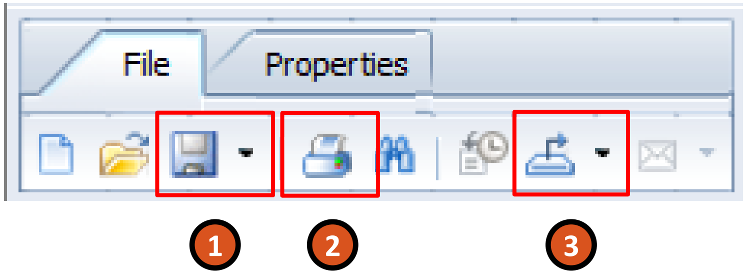
- Righ-click the chart and select **Assign Data...** The Assign Data pop-up window will open
- For the Category Axis (X-Axis) and Value Axis (Y-Axis), select which data objects should be assigned
- Click **OK**
- The chart will update on the WebI report. Formatting options are available by right-clicking on the chart and selecting **Format Chart Plot Area...**





Edit WebI Report

1. To save an edited WebI Report, click the **Save** button under the file tab. Only the **Save As…** option is available because all the standard reports are not modifiable.
   - As with OLAP Workspaces, WebI reports must also be saved in to the **Shared Analysis** folder if you want any other BI users to be able to see them.
2. The **Print** button will immediately export the report as a PDF file ready for quick printing
3. The **Export** button allows you to export the current report as a PDF file, as well as an Excel file or text file



Learning Checkpoint 5

The _______ button is only available to BI Power Users and allows them to edit Web Intelligence reports.

Fill in the blank.

A. Edit
B. Design
C. Modify
D. Display

Learning Checkpoint 5

The _______ button is only available to BI Power Users and allows them to edit Web Intelligence reports.

Fill in the blank.

A. Edit

B. Design

C. Modify

D. Display

Option B is the correct answer. The Design button enables editing for Power Users in WebI reports.

Module 5 Summary

The key points covered in this module are listed below:

- Only BI Power Users can modify WebI reports
- Power Users can save modified WebI reports as custom reports for others to view
- Calculations and formatting are edited in WebI reports in a similar way to OLAP reports

Activity 5

Transaction Name: Edit an existing WebI Report

Guide me: Edit an existing WebIReport

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Course Summary

The key points covered in this course are listed below:

- Umoja BI refers to the data warehouse and reporting tools that are used to support decision making across the organization
- The two types of BI reports are WebI reports and OLAP reports
- Analysis Workspaces can be accessed by clicking the **Documents** tab in the BI portal
- The workspaces can be saved to a public folder in the BI platform repository to share with other analysts and end users
- The workspaces can be exported to PDF files, which can be printed or sent to colleagues
- WebI reports can also be modified and saved as custom reports

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Course Assessment

Now that you have completed all the modules in this course, you can test your knowledge by completing the Course Assessment.

To receive credit for completing this course, you must pass this assessment with a minimum score of 90%.

To complete the assessment you must return to the Learning Management System:

1. Log into Inspira
2. Navigate to *Main Menu -> Self-Service -> Learning -> My Learning*
3. Search for the name of the course under the **My Learning Activities** section
4. Click the **Start** link of the course assessment
5. Click the **Submit** button once you have completed the assessment

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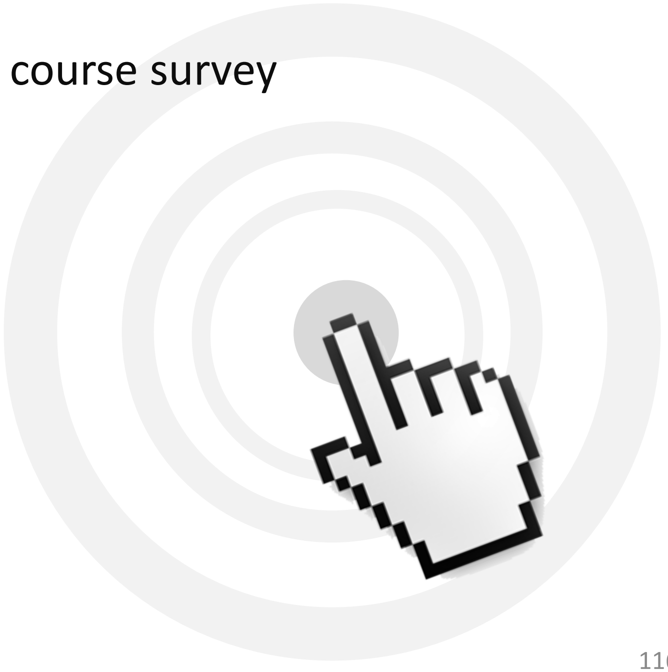
Course Survey

Your feedback is important to the continuous improvement of our training program.

Please complete the evaluation for this course using the following steps:

1. Log into Inspira
2. Navigate to *Main Menu -> Self-Service -> Learning -> My Learning*
3. Search for the name of the course under the **My Learning Activities** section
4. Click the **Start** link of the course survey
5. Click the **Submit** button once you have completed the course survey



Congratulations! You have successfully completed the *Umoja Advanced BI Navigation* course.

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