



This guide explains how to get started with Oracle BI EE. It describes how to sign in and out, navigate, set preferences, perform object-specific tasks, search the catalog, and work with favorites.

For more detailed information about these and other tasks, see the [Oracle BI EE documentation](#) on Oracle Technology Network.



Signing In to Oracle BI EE

1. In the address field of a browser, enter the URL that was provided by your organization. The Sign In page is displayed.
2. Select the language in which you want to work from the list.
3. Enter your user ID and password.
4. Select the **Accessibility Mode** check box if you want content for Oracle BI EE to be rendered in a browser in a way that facilitates the use of a screen reader.
5. Click **Sign In**.

One of the following pages is displayed, depending on what has been configured for you based on your role in the organization:

- **My Dashboard** – Your personal dashboard.
- **Home page** – An access page for your most recently performed tasks with easy access to the jobs that you perform most often.
- **Job-specific dashboard** – A dashboard designed to meet your job requirements, such as a Call Center representative.

Sign In

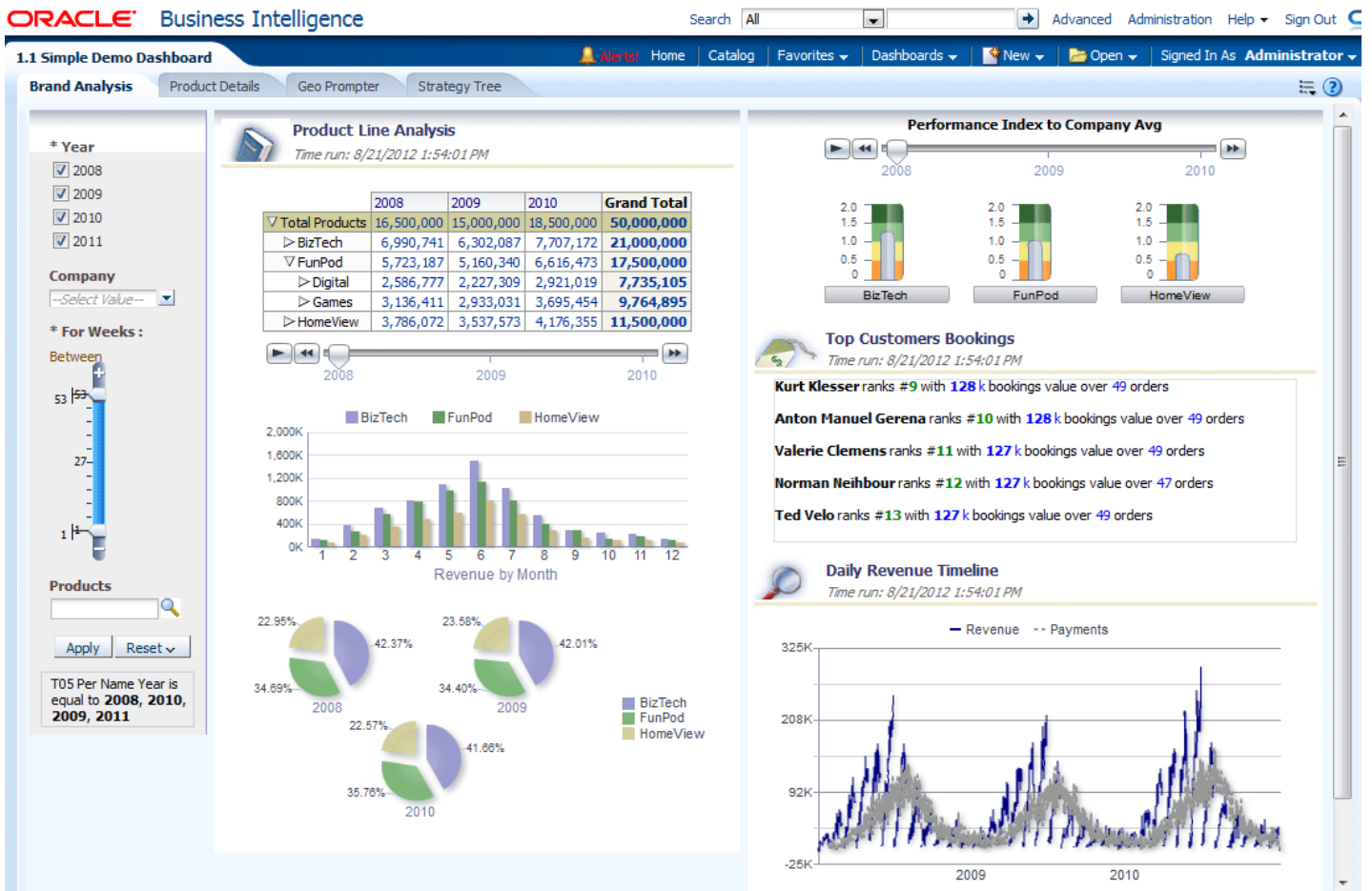
Enter your user id and password.

User ID

Password

Accessibility Mode

English ▼



Navigating Oracle BI EE

To navigate Oracle BI EE, you use:

- The Home page
- The global header

Using the Home Page

In the global header, click **Home** to display the Home page.

The screenshot shows the Oracle BI EE Home page interface. Red arrows point to various components with explanatory text:

- Create...**: Use the **Create** component to initiate the most popular tasks, such as creating an analysis or a scorecard.
- Alerts**: Use the **Alerts** component to view your alerts.
- Recent**: Use the **Recent** component to view objects that you have recently viewed, created, or updated.
- Browse/Manage...**: Use the **Browse** component to search the folders and objects to which you have permission based on your role.
- Get Started...**: Use the **Get Started** component to link to information and tools that will acquaint and help you with Oracle BI EE and other related Oracle technologies.
- Most Popular**: Use the **Most Popular** component to view a list of recommended objects that other users with your same role view.

Using the Global Header

Use the global header to quickly access commonly used functions.

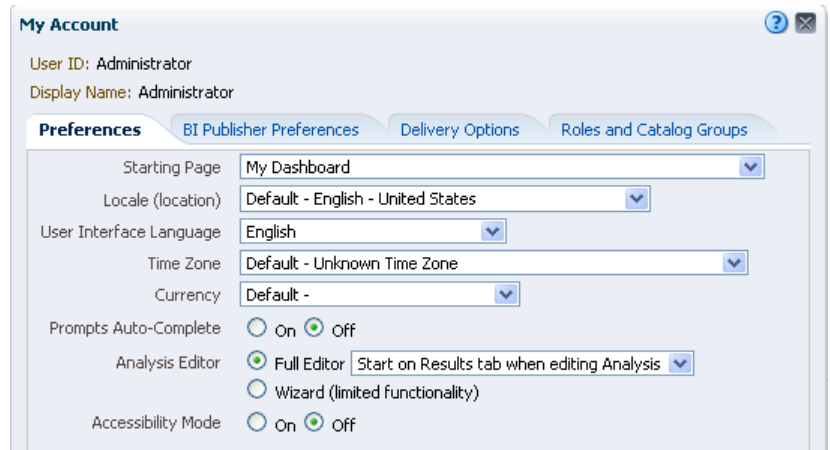
The global header is always available at the top of the user interface.

The screenshot shows the Oracle BI EE Global Header with the following elements and their functions:

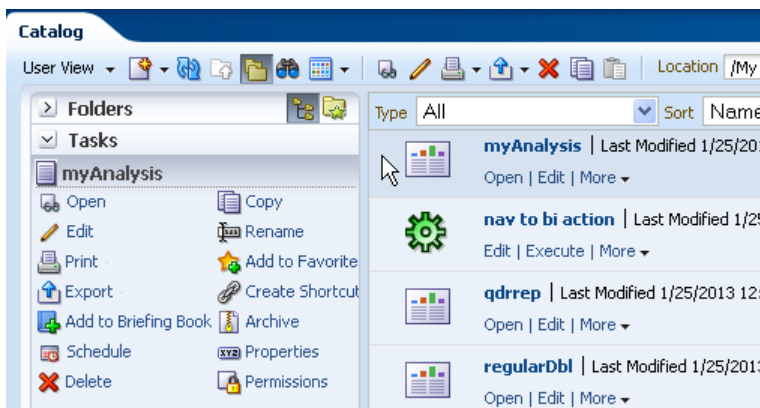
- Search All**: Use to search the catalog.
- Advanced**: Use to display the Catalog page in search mode.
- Administration**: Use to display the Administration page.
- Sign Out**: Use to set your preferences or to enable acting as another.
- Alerts**: Use to display an alert.
- Home**: Use to display the Home page.
- Catalog**: Use to display the Catalog page.
- Favorites**: Use to display your favorite objects.
- Dashboards**: Use to display links to your dashboards.
- New**: Use to display a list of objects that you can create.
- Open**: Use to open objects.
- Signed In As Administrator**: Use to set your preferences or to enable acting as another.

Setting Preferences

1. In the global header, click **Signed In As *username*** and select **My Account**. The My Account dialog is displayed.
2. Make your changes.
3. Click **OK** to save your settings.



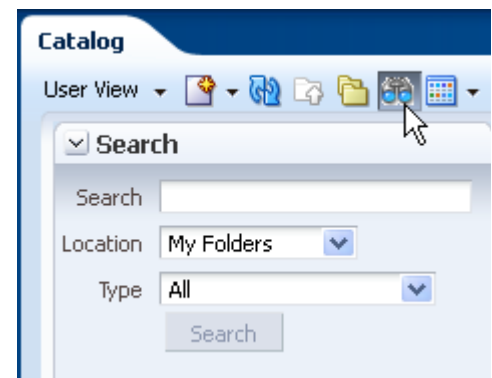
Performing Object-Specific Tasks from the Catalog Page



1. From the Catalog page, select the object for which you want to perform a task.
2. In the Tasks pane, click the option for the task that you want to perform. For example, if you want to open an object for viewing, click the **Open** option.

Searching the Catalog

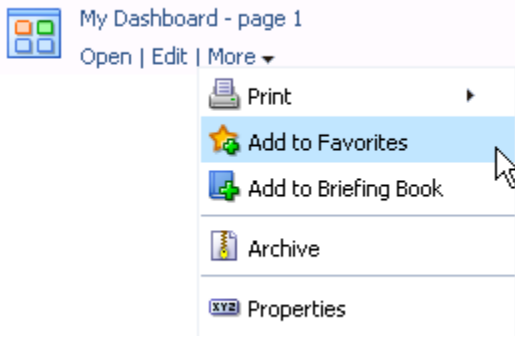
1. In the global header, click **Catalog**. The Catalog page is displayed.
2. Click the **Search** button to display the Search pane.
3. In the Search pane, specify the search criteria as follows:
 - **Search** – Enter the letters to be searched for in object and folder names.
Note: If you are using Oracle BI EE configured to use Oracle Endeca Server, then a search using the wildcard character of an asterisk (*) is not available.
 - **Location** – This option is only available for the basic search. Select the folders to search. Administrators and users with administrative permissions can search the catalog root folder. However, before you can search the root folder, you must be in Admin View.
 - **Type** – This option is only available for the basic search. Select the kind of object for which you are searching (for example, KPI, Scorecard, or Filter).
Note: To search for Hidden Items, you must select the **Show Hidden Items** box, which is located on the Catalog page's header.
4. Click **Search**.



Folders or objects that satisfy the search criteria are displayed in the Catalog area. If Oracle BI EE is configured to use Oracle Endeca Server, then the Search pane displays attribute categories such as location, object type, author, and so on. You can select attribute values to filter the search results.

Adding Objects to Favorites

Dashboards

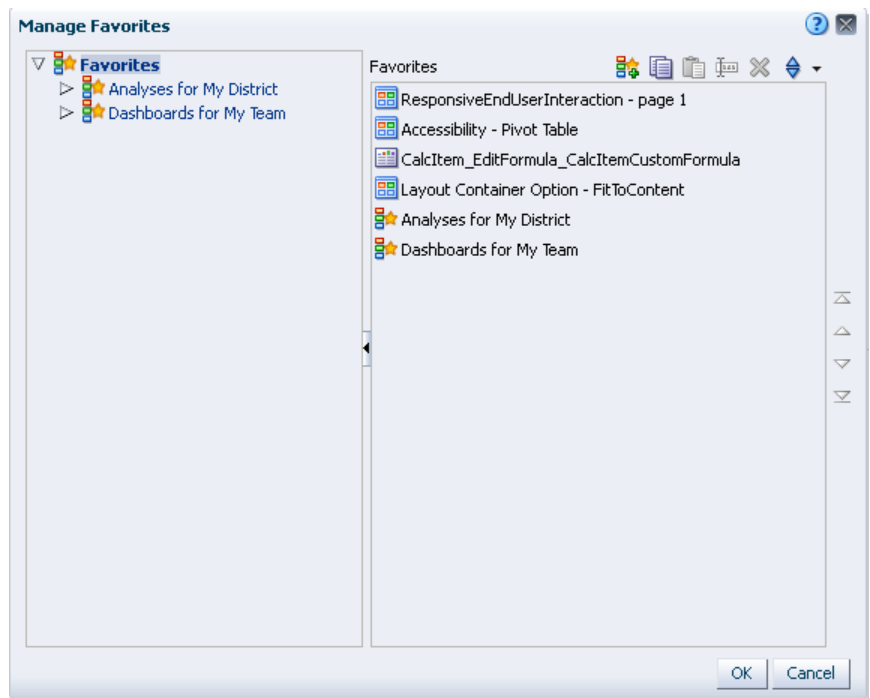


1. From the Home page or Catalog page, browse for the object that you want to add to your favorites list.
2. Click the **More** link, then click **Add to Favorites**.

Note: You can also add an object to your favorites list while editing the object. Open the object in its designated viewer or editor and, in the global header, hover over **Favorites** and click **Add to Favorites**.

Organizing Favorites

1. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
2. Click **Manage Favorites**. The Manage Favorites dialog displays.
3. To create a favorites category:
 - a. In the Category Tree or the Selection Category area, browse to and select the location where you want to add a new category.
 - b. On the toolbar, click **New Category**. The New Category dialog displays.
 - c. Enter a unique name for the category.
4. To rearrange a favorite object, in the Category Tree or the Selection Category area, browse to the location of the categories or objects and:
 - Select an object or category and click the move buttons to move the object up or down in your favorites list.
 - Drag and drop objects into categories. Drag and drop categories into other categories to nest them.
 - Copy objects or categories from one location and paste them into another location.
 - Rename categories.
 - Sort the selected categories or objects within a category by ascending or descending alphabetic order.
5. Click **OK**.



Signing Out of Oracle BI EE



1. In the global header, click **Sign Out**.

Note: Do not close the browser window to sign out of Oracle BI EE.