ORACLE ANALYTICS SERVER (OAS) TRAINING

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Oracle Analytics Server (OAS) Training

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Table of Contents

Oracle Analytics Server (OAS) Training

Introduction

Oracle Analytics Server (OAS) is a business intelligence and analytics platform that connects to Banner and other university databases to promote informed decision-making. OAS empowers academic and administrative units at Drexel to analyze trends, identify patterns and monitor key performance indicators (KPIs) through interactive dashboards and enterprise reporting.
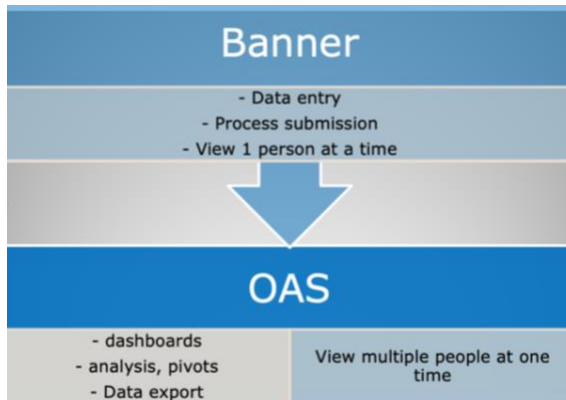

Navigation

Logging-into OAS

Note: OAS is compatible with any web browser. Drexel VPN is required when working off-campus.

To log into OAS, visit the following URL: https://reports.dcollege.net/analytics/, then enter your Drexel One username and password. Once logged in, you will be brought to the OAS homepage

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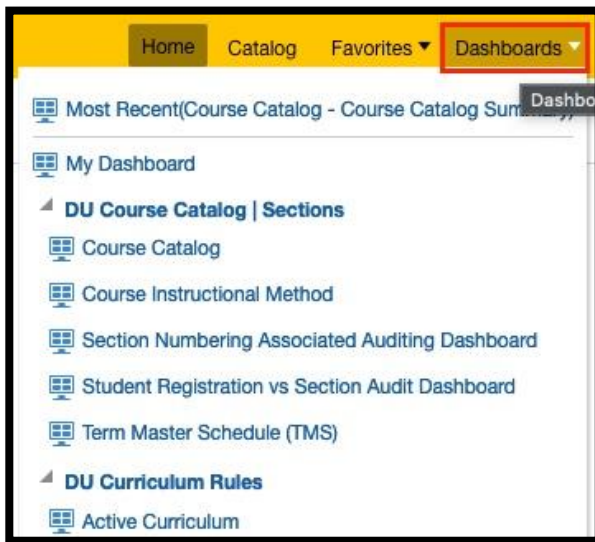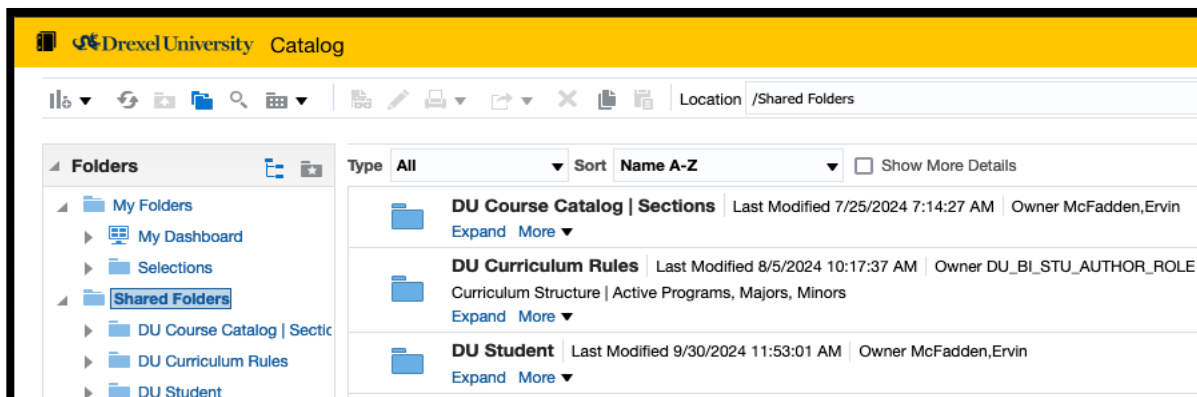https://drexel.edu/ais
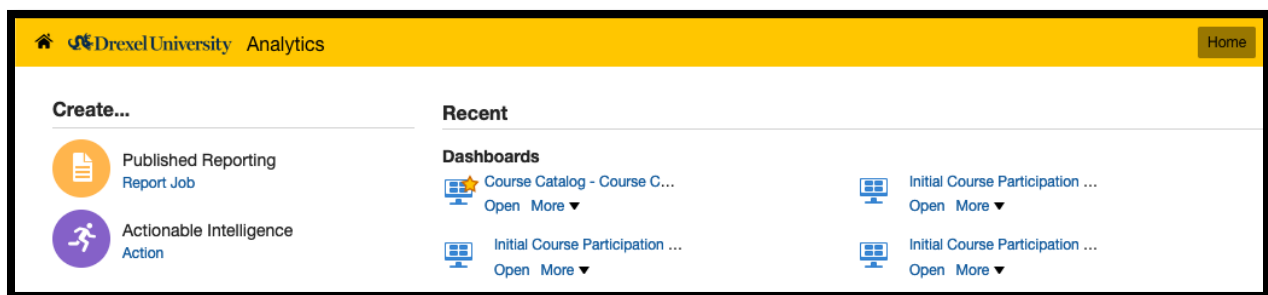
Accessing Dashboards

Most OAS users will analyze data via dashboards. There are two recommended ways to access dashboards in OAS:

1. Users can view a list of dashboards they have access to by clicking the **Dashboards** dropdown link via the top navigation menu. The resulting list will be aggregated by subject area.

2. Users can also access dashboards by clicking the **Catalog** link, which will open a directory of folders and dashboards they have access to.

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Navigating Dashboards

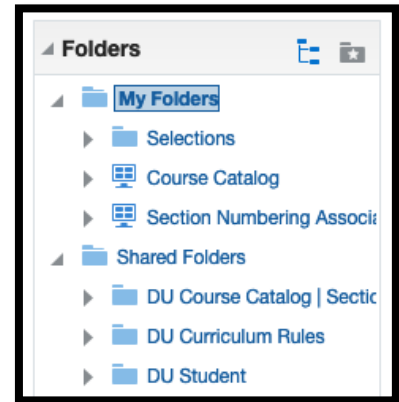There are two main folders in OAS:

My folders: users' personal folders for saving documents (e.g. analysis/dashboards/reports

Note: Access to save files to My folders varies by role

* *Shared folders*: a directory of shared folders listed by topic or subject area that users have access to

Note: Folders and subject areas vary by role.

To **expand or collapse** a folder pane, users can click on the **arrow** next to a specific folder, or they can click the show/hide folder

icon   to show and hide the folder pane altogether.

To **search for dashboards** in the **folder pane** via the **catalog**

page, users can click on the magnifying icon   on the upper panel. This will open the search pane.
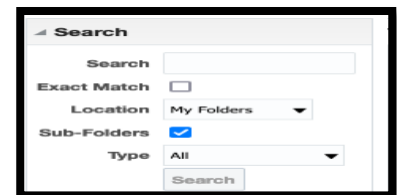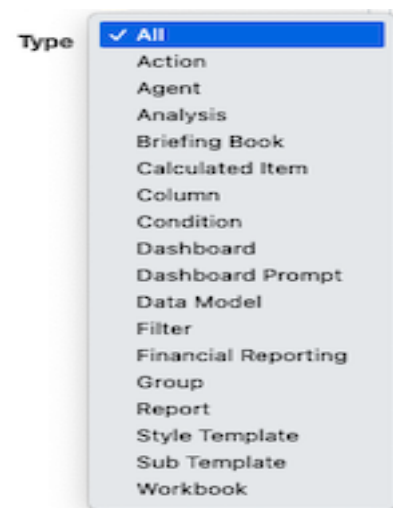
By default, the search is set to search sub folders of those in the location. Here is an explanation of each of the items in the search pane:

Search: Users can search for full words or parts of words. Search does not recognize the following wild cards: '?', '*' or '_'

Exact Match: Search text with the specific word

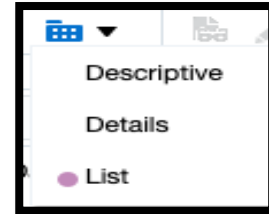**Location:** The user has three options, search the 'My folder', 'Shared folder' or both

Type: Pictured to the right are various item types that users have access to within the folder
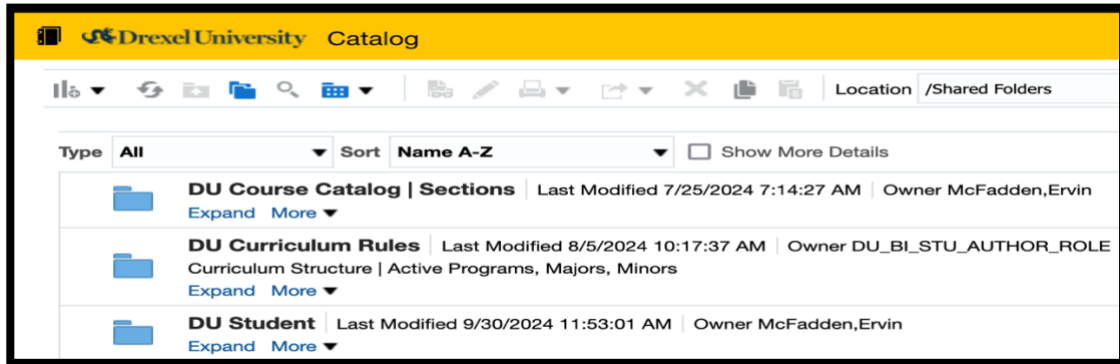
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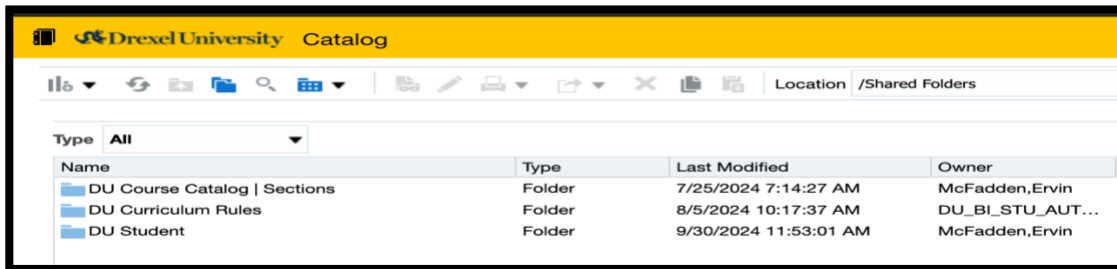https://drexel.edu/ais

Users can change the folder/file views by clicking the **change list view type** icon.

Descriptive view: Provides users a view of the objects by document name, last modified date and time, owner, and location path

Details view: Provides users a view of the object in a column—displaying the name, location, type, last modified date/time and owner

List view: Provides users a single consolidated view of all objects
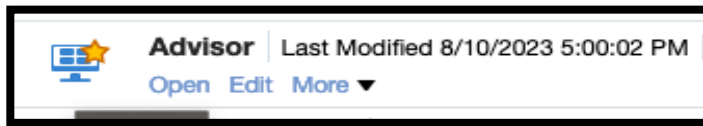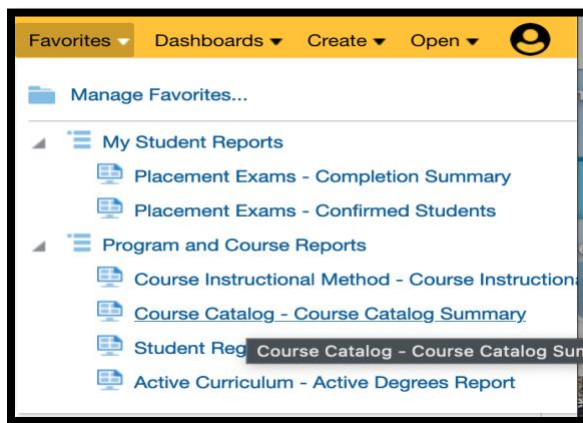
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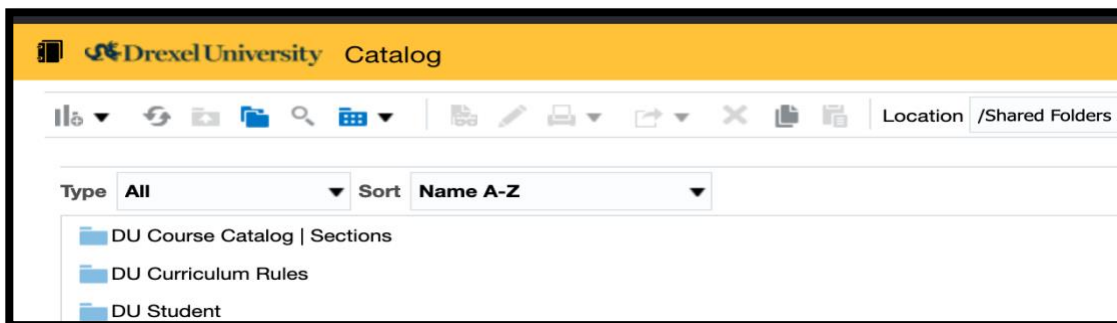
Adding Favorites

Users can bookmark content from the **catalog** page. Favorites are displayed with a gold star.

- From the Classic Home page, click **Catalog**
- In the **Catalog page**, search for the content that you want to mark as a favorite
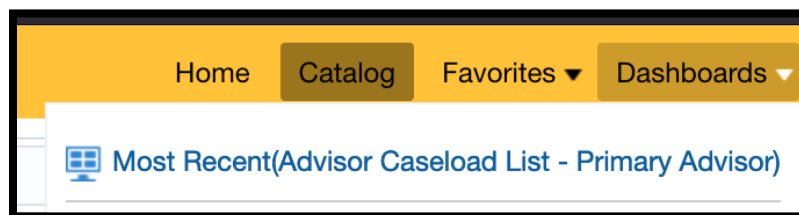- In the search results for the item, click **More**, and then **Add to Favorites**

Users can verify the object/content is added as a favorite by clicking the Favorites tab. Users can also Manage Favorites from this drop-down menu, which allows them to add, remove and organize their favorites into categories.

Recent dashboards

To view recent dashboards, click the Dashboards tab in the menu bar.

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Dashboards and Analyses

Dashboards and sub-dashboards

Users can navigate to a subject area and dashboards from the Dashboard menu. This will bring them to the main dashboard (e.g., Primary Advisor). Sub-dashboards are always listed below the main dashboard.
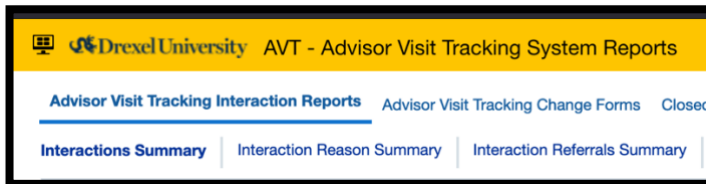

Dashboard Prompts

Applying filters

In the Primary Advisor dashboard, the prompt/filters are listed by column.

- Click on the arrow next to the data point you want to filter
- Select the values from the list or click the **Search** link to find more values from which to select
- Then click **Apply** to see the results in the dashboard analysis
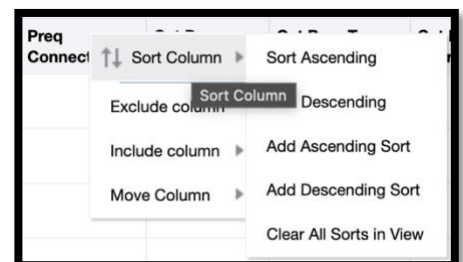

Resetting filters

Click the Reset button under the last prompt to reset the filters.
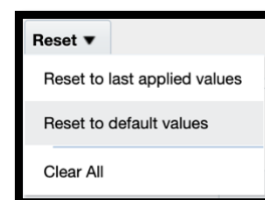
Sorting

To sort by column, users can click the upwards and downward triangles found in the column headings.

As a second way to sort by column, users can right-click the column they want to sort by to see all the sorting options.

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Moving columns

To move a column in OAS, click the top section of the column until the cursor turns into a hand icon. Then drag and drop the column to the location you would like to move it to.

Alternatively, users can select to move a column by right clicking the top of column and choosing where they want the column to appear –to the **Right/Left**, to a **Prompt** or to a **Section.**
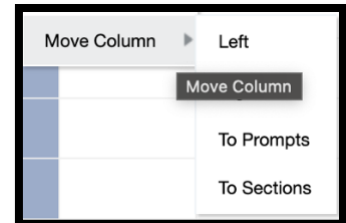
Exclude/Include

The exclude function allows users to 'hide' a column from the analysis/dashboard.

The include function allows users to add a column that was previously hidden from an analysis/dashboard to the existing object.
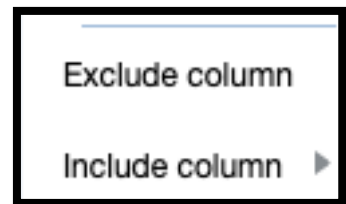
Drilling down data

Some analyses allow users to click on a link within a table to see more detailed information. This is called **drilling**.

Loading more rows/pagination

In most reports, the number of rows visible are limited. To see all rows in a report, users must click on the pagination arrow at the top or bottom of the report summary.

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Moving columns to new sections

A column can be moved to a specific section, this sorts the data by that column.

Primary Advisor Caseloads Program Major

Majr Code 1	Coll Code	Academic Yr	Levl Code	Academic Adv	Number of Students
CEDP	T	2023	GR	Colburn, Amanda	1
CHEL	T	2023	GR	Colburn, Amanda	3

For example, the **Majr Code1** column moved to the section prompt sorts the dashboard alphabetically by the major codes.

Primary Advisor Caseloads Program Major

CEDP

Coll Code 1	Academic Yr	Levl Code	Academic Adv	Number of Students
T	2023	GR	Colburn, Amanda	1

CHEL

Coll Code 1	Academic Yr	Levl Code	Academic Adv	Number of Students
T	2023	GR	Colburn, Amanda	3

Moving columns to table prompts (e.g., filters)

A column moved to a prompt sets the **moved column** as a filter in the object. Please note when a column is moved to a prompt it only allows users to **filter** one value at a time.

Primary Advisor Caseloads Program Major

Majr Code 1

✓ CEDP
CHEL
CUED
EIT
GIED
HE
HELD
SCL

Coll Code 1	Ac		evl Code	Academic Adv	Number of Students
T	20		R	Colburn, Amanda	1

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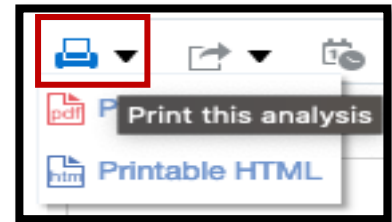https://drexel.edu/ais

Report links

Print

Users can print one of two ways in OAS:

Option 1: Users can click on the Analyze link at the bottom of
the dashboard to open the analysis window; followed by clicking
on the **print this analysis** icon and selecting **Printable PDF** or
Printable HTML.

Option 2: Users can click the **Print** link at the bottom or top of a dashboard/analysis

Edit - Refresh - Print - Export - Add to Briefing Book - Copy
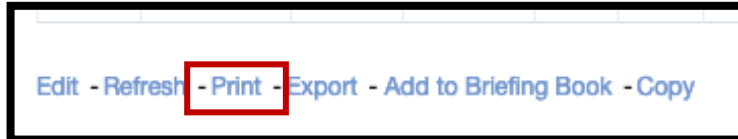
Export

The **Print & Export Options** allow users to specify the settings for printing dashboard pages and
views.

In the image above the **Print & Export Options dialog box is divided into three sections:**

- *Page Settings*: In this section, specify the paper
  size and orientation and whether to hide page
  margins

- *Include*: In this section, select the items you
  want to include in the output

- *Column Options*: In this section, select to wrap
  text in columns and to fix column widths

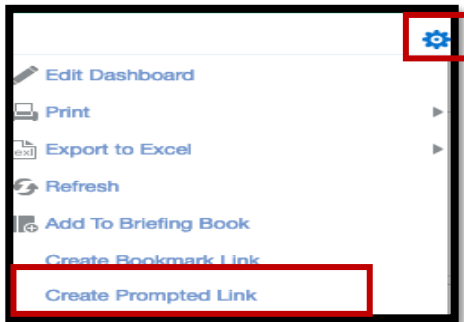# Oracle Analytics Server (OAS) Training
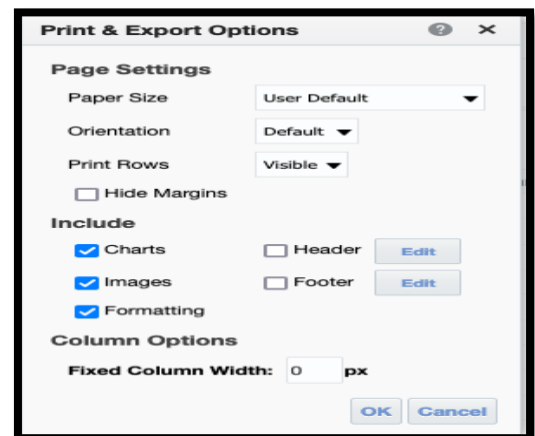
Create bookmarks

A **bookmark** is a URL that captures the path to a dashboard page. A bookmark can be created in two ways:

Option 1: Users can click on the cog wheel followed by the **Create Bookmark Link** via the upper right corner of the dashboard

The link is displayed in the Address Bar of the browser. If the link is a bookmark link, then users can save it as a bookmark or copy and send it to other users.

Option 2: Users can access the **Create Bookmark Link** by drilling down to the summary of a report.

Refreshing results

The Refresh link allows users to update the data in a report/analysis. This can be accessed by clicking on the link at the lower left corner of a report/analysis.

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Custom Dashboards

Saving customizations

This allows users to personalize a dashboard view and save it based on filter prompts/tab, moved column views, exclude/include column views etc.

- Navigate to the desired page to save the customization

- Set the filter prompts to customize the data
  For example, show data for **Coll Code = 'A'** and **major code ='DSMR'** for the **Academic Yr='2023'** and **Term Code ='202315'**

- Go to the cog wheel

- Select **Save Current Customization,** the below dialog box will appear
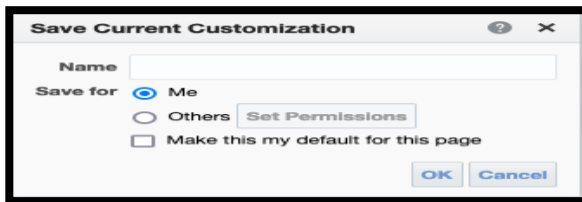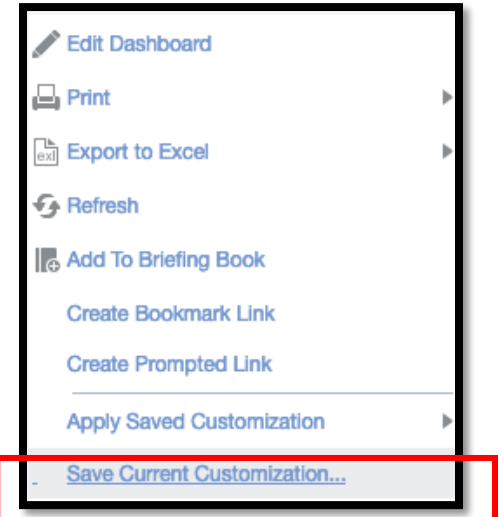
- Enter the name and indicate whether to share the customization with other users by selecting **Others**

- To make sure the customization is saved, click on the cog wheel again, select **Apply Saved Customization**, select the customization to apply
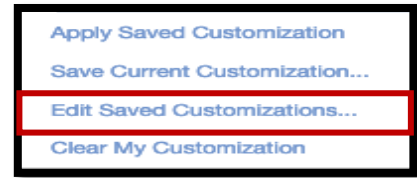
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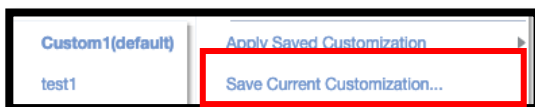
Editing customizations

This allows users to rename and delete customizations and change which customization to use by default.

- Open the dashboard
- Navigate to the page that contains the customization to edit
- Click the cog wheel and select **Edit Saved Customization**
- The **Edit Saved Customization** dialog box opens.
  In this example, the **test1** customization is renamed **Custom2**
- Click **OK** to save the setting

To delete an existing customization, select the **customization name** and click on the icon.
Then click **OK** to save the setting.
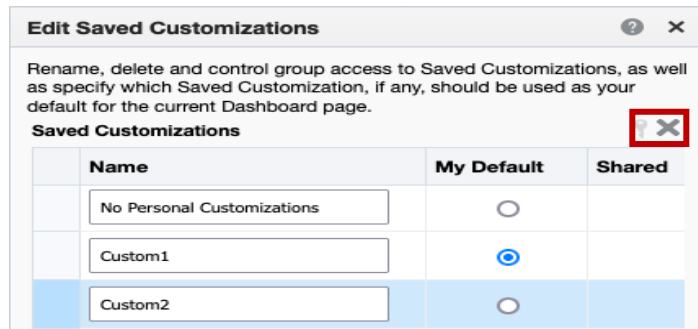
Clearing Customization

This allows users to clear current customization if they decide the choices for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse are not what they want.

- Open the dashboard
- Navigate to the page that contains the customization you want to edit
- Click the cog wheel and select **Clear My Customization**
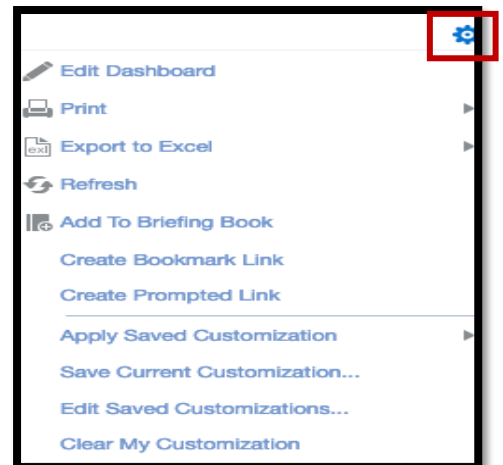
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Logging Out

To logout of the OAS, click on the profile icon in the upper right corner and select **Sign Out.**