# OCIO Finances, BuckIQ, and You

This is a quick job aid to get you through using the Income Statement Analysis dashboard. You can find more information in the Introduction to Oracle Business Intelligence guide. References to the appropriate pages are included.

## Your First Time

1. Log in to BuckIQ Business Intelligence at <https://buckiq-bi.osu.edu/analytics> using your Ohio State Username (lastname.#) and password. (Guide p.3)
	* Moving forward, the Income Statement dashboard will likely be in the Recent Dashboards section. We’ll set it as a Favorite as well, just in case.
2. Search for the Income Statement Dashboard. (Guide p. 26)
	* Select “Dashboard” from the drop-down and type “Income Statement.”
	* Type “Income Statement” and find the dashboard entry.
3. Click the OBIEE Pilot – Income Statement Analysis **Open** link.
	* Think of it like searching using Windows Explorer. It brings back everything with that text including folders and other file types that you may not be interested in.
4. Open the Favorites menu in the Standard Toolbar and select “Add to Favorites.” (Guide p.17)
5. Set the appropriate Prompts for your area. (Guide p.34)
	* **Fiscal Year**/**Period**: Varies
	* **Ledger VP/Dean**: Office of Academic Affairs
	* **Ledger College 1**: Chief Information Officer
	* **Ledger Department**: Varies
	* **Ledger Org**: Varies
6. Click **Apply** to populate the dashboard for the selected criteria.

## Manipulating Output

You can also make the output more manageable and useful by…

1. Excluding columns (Guide p. 60)
How? Right-click the column and select **Exclude**. Do not use **Hide**; if you hide a column, you will not be able to include it again later if you decide you want to see it.
	* Account Type
	* Intermediate Account
	* Original
	* Carry Fwd
	* Net Changes
2. Including columns
How? Right-click an existing column, select **Include**, and the column to include.
	* Ledger Org
	* Program
	* Project
3. Reordering columns (Guide p. 49)
How? Click the column to move to active the handle at the top. Drag to the column to where you want it. Alternatively, right-click and select **Move Column**.
	* Ledger Org
	* Program
	* Project
	* Major Account
	* Account
4. Adding subtotals
How? Right-click the column you want to subtotal, select **Show Subtotals**, and where you want to subtotal to appear. **Show After** is most common.
	* Ledger Org
	* Program
	* Project

## Saving Customizations

Like what you see? Save it as a Dashboard Customization. Dashboard Customizations save both your prompts and any changes (exclusions, inclusions, etc.) you’ve made to the dashboard output. You can save multiple customizations but only one can be your default. (Guide p. 64)

1. Open the Page Options menu  (unfamiliar icon in the upper, right corner) and select **Save Current Customization**…
2. Name the customization.
	* Only you will have access to this customization; name it something that will make sense to you.
3. Select **Make this my default for this page**, if appropriate.
4. Click OK.

Note: The saved customization includes the Fiscal Year and Period; always confirm these prompts are correct for the month you are reviewing.

Want to use a saved customization? Open the Page Options menu, select **Apply Saved Customization**, and click the customization to apply.

Need to manage your customizations? Open the Page options menu and select **Edit Saved Customizations…**. You can rename, delete, and change your default customization.

Want to remove an applied customization and return to the BuckIQ default? Open the Page options menu and select **Clear My Customization**. This will remove the defaulted prompts as well as the customized dashboard options.

## Printing and Saving Output

Want to print or save and send your dashboard output? No problem. (Guide p.39)

1. Click the **Display maximum rows** icon at the bottom, center of the output.
2. Scroll to the bottom of page.
3. Print or save a PDF of the output.
	* To print the output, click the Print link and select **Printable PDF**.
	* To save the output, click the Export link and select **PDF**.

## Moving Forward

Now that you have set the Income Statement as a Favorite and established customizations, the next time you need to access your financial information, you can:

1. Log in to BuckIQ Business Intelligence at <https://buckiq-bi.osu.edu/analytics> using your Ohio State Username (lastname.#) and password.
2. Open the OBIEE Pilot – Income Statement Analysis from your Favorites or from your Recent Dashboards.
3. Use the default or apply a saved customization.
4. Confirm the Fiscal Year and Period. If you update them, click **Apply** to update the dashboard output.
5. Enjoy!