Training Workshop on How to Use and Navigate SAMIEEE

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SAMIEEE Workshop Objectives

At the end of this workshop, you will be able to:

✓ Learn the SAMIEEE terminology
✓ Navigate the home screen
✓ Navigate the personal and shared folders
✓ Open and edit a predefined query
✓ Create an new analysis
✓ Apply sorts and filters to your analysis
✓ Add additional fields to an existing analysis
✓ Change column properties
### OBIEE 11g Terms

**OBIEE (Oracle Business Intelligence Enterprise Edition)**

<table>
<thead>
<tr>
<th>OBIEE 11g Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Analysis</strong></td>
<td>The way to choose the data you wish to display and its results</td>
</tr>
<tr>
<td><strong>Column</strong></td>
<td>Individual field which contains data and can be used in an analysis</td>
</tr>
<tr>
<td><strong>Subject Area</strong></td>
<td>Large collection of columns. Only one subject area can be used per analysis</td>
</tr>
<tr>
<td><strong>Criteria</strong></td>
<td>The individual columns and their placement that you want to display</td>
</tr>
<tr>
<td><strong>Results</strong></td>
<td>The data that matches the columns you have chosen in the Criteria tab</td>
</tr>
<tr>
<td><strong>Filter</strong></td>
<td>A way of narrowing down the results displayed</td>
</tr>
</tbody>
</table>
Training Focus

Our hands-on training will focus the following 7 areas (7 chapters):

1. The SAMIEEE Tour
2. Running an Analysis
3. Applying Sorts and Filters
4. Refining Filters for Chapter Chair Reports
5. Downloading Your Analysis
6. Inserting Additional Columns
7. Customizing Your Column Display
1. The SAMIEEE Tour
Logging into SAMIEEE

• Open an Internet Browser – log onto the IEEE SAMIEEE home page.

  http://www.ieee.org/samieee

• Select the appropriate link Access SAMIEEE

  https://analytics.ieee.org/analytics/saw.dll?bieehome&startPage=1

• Enter your appropriate sign-on IEEE web account username and password.
• Click on sign in button.
Sign-on screen
After a proper log-in, pops up this screen
After click on “Edit”
Menu on The Screen Upper Bar

“Home” tab

Special IEEE Notification

Please note that IEEE Communications Preferences have been changed to clarify intent. As a result, there are changes to the "Contact Flags" in the subfolder within the "Member Info" folder. These changes represent a reverse in meaning to the original fields. For example "Do Not Call" is now "OK to Call", "Do Not Email" is now "Send E-Mail", etc. If you have saved queries in "My Folder" that include any "Contact Flags", you must remove them, and add the new ones. If the old fields remain in your query, the report will not run.

Alerts

Recent

Recently opened or edited items will be displayed here.

Dashboards

Others

Most Popular

No recommendations are currently available. Most Popular items will be displayed here when results become available.
Menu on The Screen Upper Bar

"Catalog" tab
Menu on The Screen Upper Bar

“Favorites” tab
Menu on The Screen Upper Bar

“Dashboards” tab
Menu on The Screen Upper Bar

“Open” tab
The Home Screen

- Personalized to the user
- Will contain:
  - Your recent analysis, dashboards and charts
  - What has been most frequently used by other users of the system
  - Create menu allowing you to create most anything you need
  - Browse menu to find created items
Home Screen

Special IEEE Notification
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Alerts

Recent
Recently opened or edited items will be displayed here.
Dashboard

Others

Most Popular
No recommendations are currently available. Most Popular items will be displayed here when results become available.
Quick Access Menu

- Home Tab
- Available Analyses
- Open an Existing Dashboard
- Create a new analysis
- Open a private or shared file
Your OBIEE 11g Folders

- You can store analyses and other objects in folders in OBIEE 11g

- There are two different types of folders
  - **My Folders** – your personal folder, viewable by nobody else
  - **Shared Folders** – “SAMIeee” folder containing Predefined Queries for volunteers and “IEEE Volunteer Queries” folder for volunteers to share queries with other officers in their organizational unit
"Home": Viewing Your Folders

Click All Content and choose "Browse Oracle BI Presentation Catalog"

Choose Catalog to open folder list

Choose Open from your Quick Access Bar
Search Feature

Search for an analysis, dashboard, or other item

Type in your search term
Opening an Analysis (query)

From "Catalog" screen, the "Open" link reveals a Windows Explorer-like interface, allowing for different views.
Predefined Queries

The **SAMIEEE Shared** Folder contains several sub-folders:

- **Geographic Predefined Queries** contain analysis created for use by Organizational Units, such as Regions, Sections, Chapters.
- **MD Predefined Queries** contains analysis created for use by Membership Development Officers.
- **Society Predefined Queries** contain analysis created for use by Society users.
- Volunteers with SAMIEEE access can use any of the predefined queries.
- Queries can be run “as is” or “modified”. If modified, they can be saved to the users “My Folders”.

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IEEE PES
Power & Energy Society

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IEEE
Advancing Technology for Humanity
1. Select Catalog to open list

2. Double click to open SAMIEEE shared folder and then open required subfolder Geographic Predefined Queries

3. Scroll to find query – click on Open to run instantly or Edit to open Criteria/Results area to modify
3. Select **Criteria** tab to modify or add multiple columns and/or modify or add filters.

4. Select **Results** tab to view completed analysis or add single column to analysis.
Creating an Analysis (ad hoc query)

3. Select **Criteria** tab to modify or add multiple columns and/or modify or add filters.
Before You Create That “Analysis”!

- It’s important to plan your analysis carefully, so you don’t have to continually make changes.

- Ask yourself questions about what you want to produce, and which fields you want to use to get that result.
How Do We Create an Analysis?

Under the Create menu, select Analysis

OR

Select New from quick access bar
Select SAMIeee Subject Area

Under New select Analysis and then click on
Your OBIEE 11g Analysis Screen

Select Columns:
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Drop Columns Here.

Add Filters:
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

Add Filters Here.
Adding Criteria to an Analysis

- Drill down into the **folders** to find the column you want to add.
- When you find the column, double click on it or drag it to the Selected Columns screen.
- Columns can come from anywhere within the Subject Area.
Column Close-Up

Parent Folder

Column Name
Criteria Added to Selected Columns

Double-click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column’s properties, formula and filters over the button next to its name.

Profile
Member Number, First Name, Last Name, IEEE Profile, Geographic Info
IEEE Membership Status Description, IEEE Current Grade Description, Section Name

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved selecting its name in the catalog pane.

Add Filters Here.
2. Running an Analysis
Running an Analysis

- When your columns are placed, select the Results tab

  - The OBIEE 11g screen will show the analysis is running

  ![Search icon](search_icon.png)

  Searching... To cancel, click here.

  - Results will populate when the analysis is finished
The populated Analysis Results Screen

<table>
<thead>
<tr>
<th>Member Number</th>
<th>First Name</th>
<th>Last Name</th>
<th>IEEE Membership Status Description</th>
<th>IEEE Current Grade Description</th>
<th>Section Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>00116732</td>
<td>Andrew</td>
<td>Lachowsky</td>
<td>Active</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00111641</td>
<td>Tom</td>
<td>Grigg</td>
<td>Active</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00642395</td>
<td>James</td>
<td>Alexander</td>
<td>Inactive</td>
<td>Life Member</td>
<td></td>
</tr>
<tr>
<td>00625024</td>
<td>Chris</td>
<td>Poole</td>
<td>Active</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00627758</td>
<td>Gary</td>
<td>Lee</td>
<td>Inactive</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00627757</td>
<td>Steven</td>
<td>Purdy</td>
<td>Active</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00635367</td>
<td>Bruce</td>
<td>Rew</td>
<td>Active</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00640011</td>
<td>Tricia</td>
<td>Weidling</td>
<td>Inactive</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00757732</td>
<td>Eduardo</td>
<td>Moreo</td>
<td>Inactive</td>
<td>Member</td>
<td></td>
</tr>
<tr>
<td>00788822</td>
<td>J</td>
<td>Barr</td>
<td>Active</td>
<td>Life Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>00935429</td>
<td>J</td>
<td>Childress</td>
<td>Active</td>
<td>Life Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>00935993</td>
<td>E</td>
<td>Bertolli</td>
<td>Active</td>
<td>Life Fellow</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>00970327</td>
<td>W</td>
<td>Allsopp</td>
<td>Active</td>
<td>Life Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01022359</td>
<td>Norman</td>
<td>Graham</td>
<td>Active</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01126515</td>
<td>Terry</td>
<td>Talley</td>
<td>Active</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01236013</td>
<td>Russel</td>
<td>Bruhn</td>
<td>Active</td>
<td>Affiliate</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01291354</td>
<td>Cleon</td>
<td>Rogers</td>
<td>Active</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01568779</td>
<td>Jack</td>
<td>Leach</td>
<td>Active</td>
<td>Life Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01532984</td>
<td>Brian</td>
<td>Howard</td>
<td>Inactive</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01655290</td>
<td>Troy</td>
<td>Henson</td>
<td>Active</td>
<td>Life Senior</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01659747</td>
<td>Louis</td>
<td>Oswald</td>
<td>Active</td>
<td>Life Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01657044</td>
<td>Stephen</td>
<td>Titus</td>
<td>Active</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
<tr>
<td>01741107</td>
<td>Paul</td>
<td>Chamoun</td>
<td>Active</td>
<td>Member</td>
<td>Arkansas Section</td>
</tr>
</tbody>
</table>
Some Tips for Running Your Analysis

- If your analysis is running for a long period, you may wish to cancel it and notify SAMIEEE admin at samieee@ieee.org.
- If running a predefined query, give name.
- If running an ad-hoc analysis, give field and filtering specifics.
- Use Filters to reduce the number of matching records.
Navigating Your Results

- There are 25 records per screen
- You can
  - Go forward one screen
  - Go back one screen
  - Move to the beginning
  - Display all results (Not recommended)
Saving Your Analysis

- You can either Save or Save As
- Navigate to the folder where you want to save the analysis
- Enter in a name and a description

Save

Save As
3. Applying Sorts and Filters
Accessing the Sort Menu

- On selected column, click the bulleted list on the right hand side of the column name.

Select the bulleted drop down for Sort and other functions.
Sorting

- Can sort any column
- Can sort multiple columns
  - First column sorted is primary sort
  - Second column sorted is secondary sort
- If a column’s sort is removed, remaining sorts move up in order
- When changed/modified analysis will automatically run again
The Sort Menu

- Sort
- Edit formula
- Column Properties
- Filter
- Delete

- Sort Ascending
- Sort Descending
- Add Ascending Sort
- Add Descending Sort
- Clear Sort
- Clear All Sorts in All Columns
Filtering

- Filtering eliminates unnecessary data and gives you only the results you need.
- Can be applied to any column, whether it is showing in your analysis or not.
- Can have multiple filters.
Filtering on a Column
The Consolidated Filter Button

Filters are now consolidated to one button. There is no need to have a column pulled into the Selected Columns area in order to place a filter on it.
Creating a Filter

- Choose the column you wish to filter on
- At the next screen, choose the Operator
  - Examples include *Greater Than, Less Than, Between*
- Choose your criteria
  - Typing it in
  - Select from a drop-down menu
  - Use the More/Search Feature
Using Filters

Operator

Drop Down Choices
Changes in Filter Criteria Display

You can choose multiple values at one time.

You may also need to use the More/Search option.

Note: There is a limit to the number of items that can be shown in the drop down. If that is the case, use More/Search.
Using More/Search

Type in a whole or partial term, and then click Search.

Your results appear in the Name box.

Your choices are moved over.

Select Move or Move All

Select OK
Filters Added to the Filters Area

- Add filters to the analysis criteria by clicking on the filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on the add button after selecting its name in the catalog pane.

AND IEEE Membership Status Desc is equal to /is in Active
AND IEEE Current Grade Description is equal to /is in Member
AND Section Name is equal to /is in Alabama Section
Creating a Filter from Non-Displaying Columns

- Allows you to create a filter for the analysis without having to display the column
- Keeps your analysis screen clean
- Good for when only one value or few values are being displayed
Creating a Filter from Non-Displaying Columns

Select Filter Button and then choose the More Columns option.
Creating a Filter from Non-Displaying Columns

Choose the column you wish to use, and then the place filter criteria.
Working With Filters

When you hover over the filter line with your mouse, the Edit and other buttons will appear.

In the filter area, by default, the Edit and other buttons are hidden from view.
4. Refining Filters for Chapter Chair Reports
Chapter Chair Reports/Filtering

- Chapter Chairs are automatically limited to viewing information for “their” chapter members.
  - This includes any joint section or joint society members.
  - View includes both “Active” and “Inactive” Status for their Society (and/or joint Society)
  - therefore, if user wishes to have list of “only” Active members, further filtering must be done on all predefined queries.
Reports run in Geographic Predefined Queries folder

- All reports include **Active** and **Inactive** Society Members. Reports must be edited to include a **filter** for selection.

Find your query. Select “Edit” in order to open in the editing area of the query.

Query opens in **Results Tab**. Immediately click on the **Criteria Tab**. Select the “**Society List**” field from the All Memberships and Subscriptions Folder.
Reports run in Geographic Predefined Queries folder (Cont.)

- Add filter to search for your Society **Membership Code**.
- Select Operator of "contains any"
- In value, type code for your society (ex. **MEMSSC037**). When adding Joint Societies, type a semicolon (;) in between each code.
Reports run in Society
Predefined Queries

- To use these queries, user must edit each filter to choose their Society and their Society membership Status.
  - Open query, select “Edit” and immediately select “Criteria” Tab.

- Filter must always include two fields in order to complete.
  - Membership or Pub Code
  - Current Status
Reports run in Society Predefined Queries (Cont.)

- Place filter on “Membership or Pub Code”
  - Select “is equal to/is in”
  - Type in “MEM plus society code”
    - (for example: MEMSSC037)
5. Downloading Your Analysis
Downloading an Analysis

- Analyses can be downloaded into
  - Excel
  - PowerPoint
  - PDF
  - Web page (.mhtml)
  - Data (.csv, .txt)

- Allows for further refinement of data or ability to broadcast results
Downloading an Analysis

Choices you are presented

Download button
6. Inserting Additional Columns
Adding One Column at a Time in Results View

- Allows for speedy additions to your analysis results
- Can only be done one column at a time
- Results will immediately recalculate
- Good for small results return or for inserting small amount of columns
- Can be time consuming for large results return or for multiple columns
While in **Results** tab, select the column and double click to add it to your analysis.
Adding a Single Column - Results

The analysis will run again and the column will appear in the results.
Adding Multiple Columns – Criteria View

- Process allows for multiple columns to be added to your results at once
- Multi-step process
- Involves editing your analysis
- Gives you flexibility in customizing the look of your analysis
In the **Criteria** tab, select the columns and add them in. When completed select the **Results** tab.
Columns Not Appearing

Though you have run your analysis, the added columns do not appear in the results. An extra step is required to get the columns to show.
Adding the ‘Lost’ Columns

In the Results view, find and select the Edit button in the top right hand corner of the screen.
In Layout View, scroll down to find Excluded area. Here are your hidden columns. Drag them to Columns and Measures area.

The Layout View is presented under the Results View.
Adding Multiple Columns - Results

The Analysis will run in Results view following each column placement.

Oracle BI Answers - Mozilla Firefox

IEEE Business Intelligence

Oracle BI Answers

The Analysis will run in Results view following each column placement.

Oracle BI Answers
Finishing Editing

When you are finished editing, select the Done button on the top right hand side of the screen to view your results.

If you don’t like the results, you can choose Revert to go back to the original results.
7. Customizing Your Column Display
Customizing Your Column Display

- Done via Column Properties
- Can add borders, shading, change fonts, or customize how data is displayed
- Customizations will appear when results are run
- Customization may not always download properly
Customizing Your Column Display

- Sort
- Edit formula
- Column Properties
- Filter
- Delete

Column Properties
# Customization Tabs

<table>
<thead>
<tr>
<th>Tab</th>
<th>Customizations Available</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Style</strong></td>
<td>Cell Shading</td>
</tr>
<tr>
<td></td>
<td>Fonts and Sizes</td>
</tr>
<tr>
<td></td>
<td>Borders</td>
</tr>
<tr>
<td><strong>Column Format</strong></td>
<td>Custom Field Names</td>
</tr>
<tr>
<td></td>
<td>Custom Parent Folder Names</td>
</tr>
<tr>
<td></td>
<td>Suppress or Allow Grouping</td>
</tr>
<tr>
<td><strong>Data Format</strong></td>
<td>Allows for change in how data is represented (e.g. date format)</td>
</tr>
</tbody>
</table>
SAMIEEE
Questions & Assistance

If you have any questions regarding SAMIEEE or need further assistance, here are some contacts.

@

IEEE
Member & Geographic Activities (MGA)
Technical Activities Dept.:
SAMIEEE Staff Contacts

GEOGRAPHIC ORG UNITS CONTACTS
Helen Shiminsky (primary)
Email: h.shiminsky@ieee.org
+1 732 562 5517

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Rosanne Loyal (alternate)
Email: r.loyal@ieee.org
+1 732 562 3903
Thank you

Wahab Almuhtadi
## IEEE Membership Grade Types

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>H</td>
<td>Honorary member</td>
</tr>
<tr>
<td>2.</td>
<td>LF</td>
<td>Life Fellow</td>
</tr>
<tr>
<td>3.</td>
<td>F</td>
<td>Fellow</td>
</tr>
<tr>
<td>4.</td>
<td>LS</td>
<td>Life Senior</td>
</tr>
<tr>
<td>5.</td>
<td>SM</td>
<td>Senior Member</td>
</tr>
<tr>
<td>6.</td>
<td>LM</td>
<td>Life Member</td>
</tr>
<tr>
<td>7.</td>
<td>M</td>
<td>Member</td>
</tr>
<tr>
<td>8.</td>
<td>AM</td>
<td>Associate Member</td>
</tr>
<tr>
<td>9.</td>
<td>GSM</td>
<td>Graduate Student Member</td>
</tr>
<tr>
<td>10.</td>
<td>StM</td>
<td>Student Member</td>
</tr>
</tbody>
</table>