BI PORTAL REPORTS

THE BUSINESS INTELLIGENCE (BI) PORTAL REPORTS ARE SIMPLIFIED VIEWS OF ENTERPRISE DATA IN A PREDEFINED, EASY TO FILTER FORMAT. THESE REPORTS ARE AVAILABLE THROUGH THE BI PORTAL. THE DATA THAT DISPLAYS IS REFRESHED NIGHTLY.

**Benefits**

From a single location you have the ability to:

- **EXPLORE**: 100+ Reports* using the Subject Area wheel
- **SEARCH**: Search for reports by name
- **FAVORITE**: Add reports to your Favorites for quick access from the BI Portal homepage
- **FILTER**: Use group and source filters to narrow results
- **EXPORT**: Save the report to your computer for further analysis

*Access to these reports varies based on your EDW Access security role

**What data can I find in reports?**

Institutional reports span multiple subject areas including Academic, Research, Human Resources, and Finance.

**Quick Tip: Select the right report**

“There are so many reports! How do I know which report is exactly what I’m looking for?”

> Knowledge Navigator is your guide to understanding UW data and information.

Find information across subject areas, databases, glossaries, business intelligence and diagrams. Connect from Knowledge Navigator to the exact report in BI Portal that contains that data and information you need.

Visit: metadata.uw.edu

**Informational Tabs**

Once you select the report you want to run, a report details page displays tabs that contain important information you and your colleagues may want to know:

- **Overview**: High-level summary of what the report is and how it can be used
- **Technical Information**: Report details including data origin, when the report was last updated, who authored the report, the group that supports that report, and which tables populate the report.
- **Security Information**: Details displaying which roles have access to this report as well as your EDW Access granted role.

**What is the BI Portal?**

The BI Portal is your gateway to the UW’s Enterprise Data Warehouse (EDW) reporting and analysis tools. Use BI Portal to find reports, data visualizations, and analysis cubes, as well as description information about those tools.

**What is the EDW?**

UW’s EDW is a set of databases accessible across the University. Nearly every UW school, college, and unit uses EDW data to perform data analysis and meet their operational and compliance reporting needs.
**1. Visit**

Navigate to:
biportal.uw.edu
Log in using your UW NetID.
Select the “Reports” tab.

**2. Search/Filter**

Find a Report
Explore available Reports using the following:
- Search by name
- Filter by
  - Subject Areas
  - Support Group
  - Table
  - Database

**3. See Details**

Understand the Report Details
After you choose the Report you want to explore, you navigate to the Report Details page with the following tabs:
- **Overview**: Learn the Report’s purpose
- **Technical Information**: Discover technical specifics
- **Security Information**: See access details
- **SQL Queries in Report**: Review report’s query
- **Recommended Reports**: Discover similar reports

**4. Run & View**

Run a Report
Select “Run Report.” This will open the Report in your browser. Use the filters to narrow your Report criteria.

Note: You may be asked for your username and password if this is the first Report you’ve run in this session.

Run Note: Some reports may take longer to display due to the complexity of the data.

View a Report
Select “View Report” to see the Report details.

Note: To save, use the “Export dropdown menu.”

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**Reports Data**
All data that displays in the BI Portal is refreshed nightly when EDW data is updated.

**OPTIONAL:** Filter by Subject Area

By choosing to filter by **Subject Areas**, you can quickly navigate to the available areas:
- Academics
- Research
- Financial Resources
- Human Resources