CareOregon Business Intellegence (COBI)

End User Guide

August 2016

What is COBI?

COBI, CareOregon Business Intelligence, is a business intelligence portal that harnesses Tableau's powerful capabilities for analyzing and reporting complex information in dashboard form. Designed to simplify the way users' access, manage and visualize data, COBI enables CareOregon staff, stake holders, external partners, and others easy access to important new insights about our business and the members we serve. COBI is being gradually rolled out, starting an 18-month journey in January 2016, in order to build capabilities and serve an ever wider internal and external audience.

As Report Authors (builders of Tableau dashboards) from a widening set of departments are trained and create new dashboards, teams using those dashboards will be granted access to review them. Once certified, these dashboards also feature robust data access controls, providing CO staff along with their external partners secure access to the information they need to help our members. CareOregon's policies limiting PHI access to the minimum necessary to perform job duties determines the type of information and level of detail available to Tableau users.

If you need assistance with Tableau functionality, please submit a ticket to CareOregon tech support at COBIsupport@careoregon.org.

Logging onto COBI

To log on COBI and see your dashboards you will need specific permissions. Start by accessing: https://cobi.careoregon.org

Non-CareOregon Employees
Clicking the Login button on the 'Welcome to COBI' page (1) takes you to the COBI Login page (2) where you enter your username and temporary password, provided in your initial welcome email.

CareOregon Employees

Internet Explorer
Clicking the Login button on the 'Welcome to COBI' page (1) takes you directly to your Home Page (3).

Chrome
Clicking the Login button on the 'Welcome to COBI' page (1) takes you to the COBI Login page (2) where you enter the domain name "**co**" and your **username** (for example **co\SmithJ**) as your User ID, and your regular CareOregon **password** in the spaces provided.
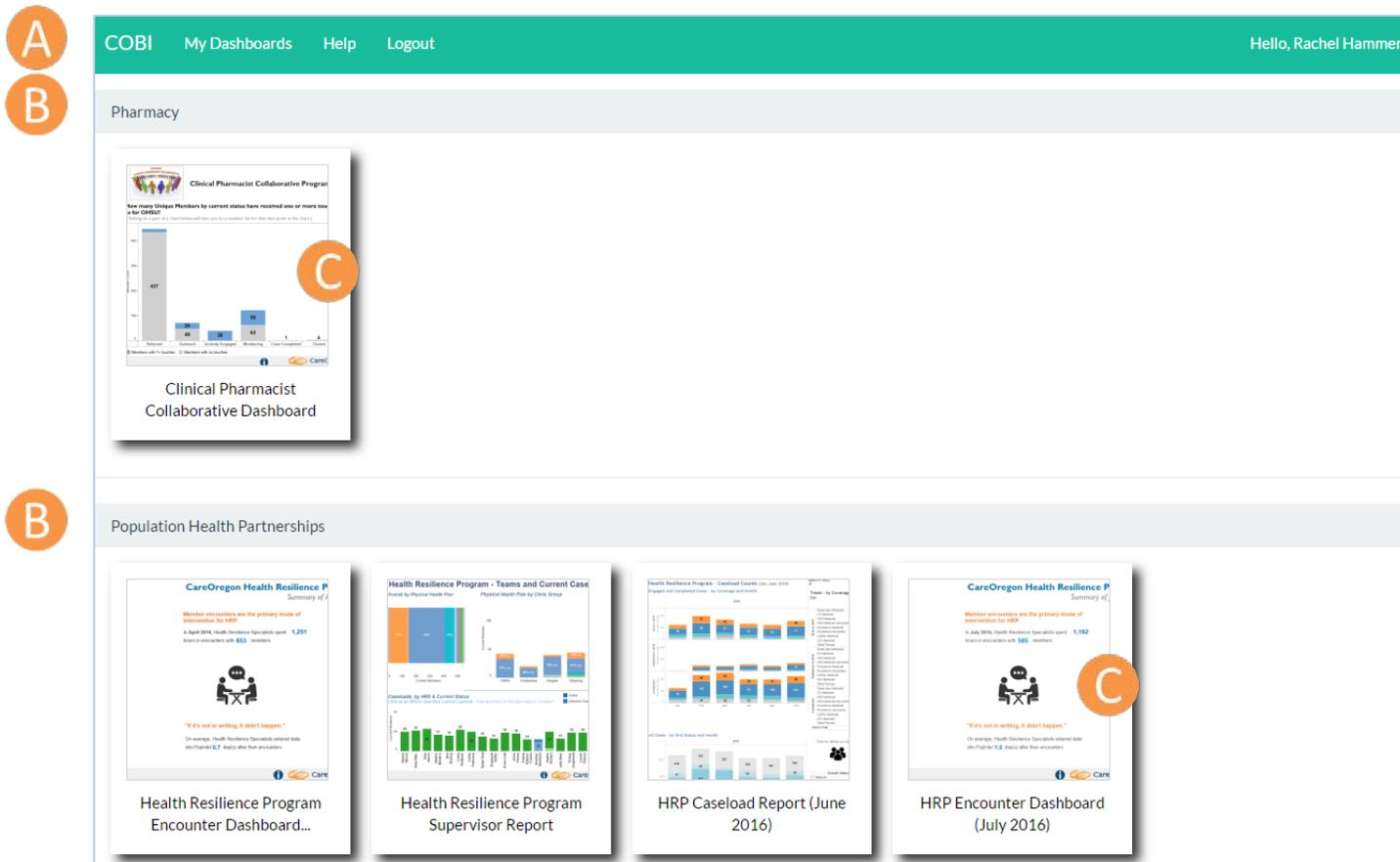
Welcome to COBI Page	COBI Login Page: (external and Chrome):	Your COBI Home Page:

'My Dashboards' Home Page

Here's what's displayed in your thumbnail view:

Ⓐ Navigation Bar
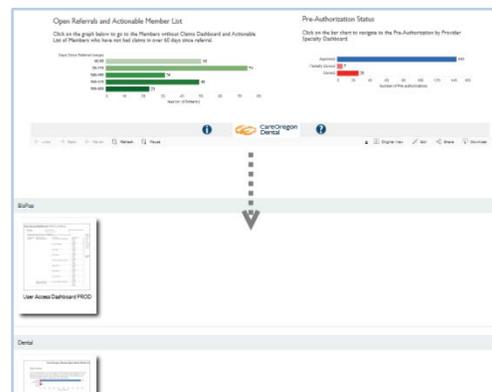
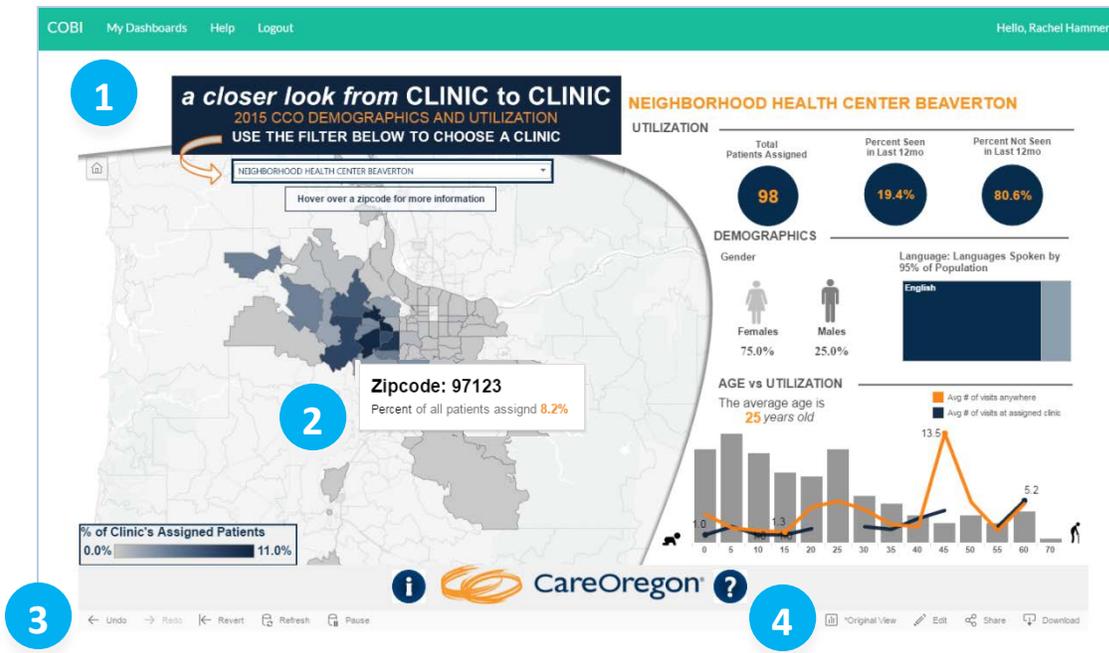Click here to access My Dashboards, Help, or to Log Out.

Ⓑ Section Titles

You can view the department or content areas in which you have one or more Dashboards.

Ⓒ Dashboard Thumbnails

Click on a dashboard thumbnail to view and interact with that dashboard.

Once you select a dashboard, the dashboard will appear at the top of the page, with the thumbnails below it. You can return to 'My Dashboards' by scrolling down or selecting the 'My Dashboards' link in the navigation bar:

Here's what's displayed in your dashboard view:

1   **Filters & Instructions**

Select relevant information from drop down lists. This selection will change the content of the view.

Keep an eye out for instructions and notes throughout the views left by authors to help navigate the content. The "How To" icon is a great place to look for additional information on how to navigate the dashboard.

2   **Tooltips**

Hover over data points (bars, lines, maps points, etc.) and icons to reveal additional detail about a particular data point or view, in a Tooltip.

Information 🛈 & **How To** ❓ icons are located below each view, next to the CareOregon logo.

3   **Right-Side Menu**

This menu bar includes options to bring the dashboard back from what has been clicked in this session, including…

- A single-click 'Undo' to take one step back
- 'Revert' to return the dashboard to its original state
- 'Pause' allows multiple filter changes before reload

4   **Left-Side Menu**

The menu bar includes options to:

- **Save changes as a Custom View**
  Click Original View, type a name, and then click Save

- **Share** *Not Functional at this time*
  At this time, the Share functionality will not work. This will be a future enhancement

- **Download Worksheet Data**
  Select the desired visualization to download image, data, crosstab, or PDF of the Tableau Workbook.

  Be sure to click on the imagine

  or table you want to download first!