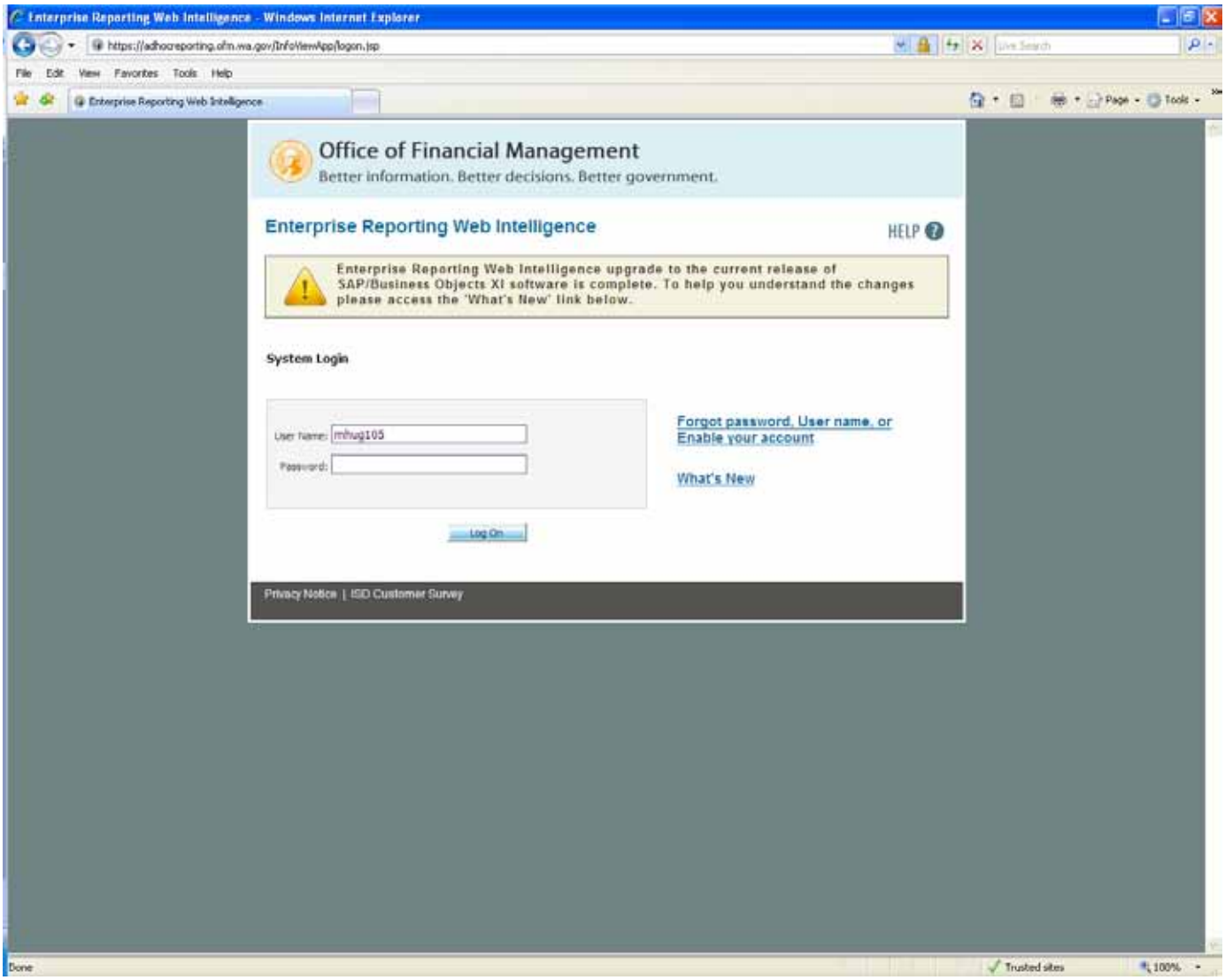
How to run a webi/adhoc report

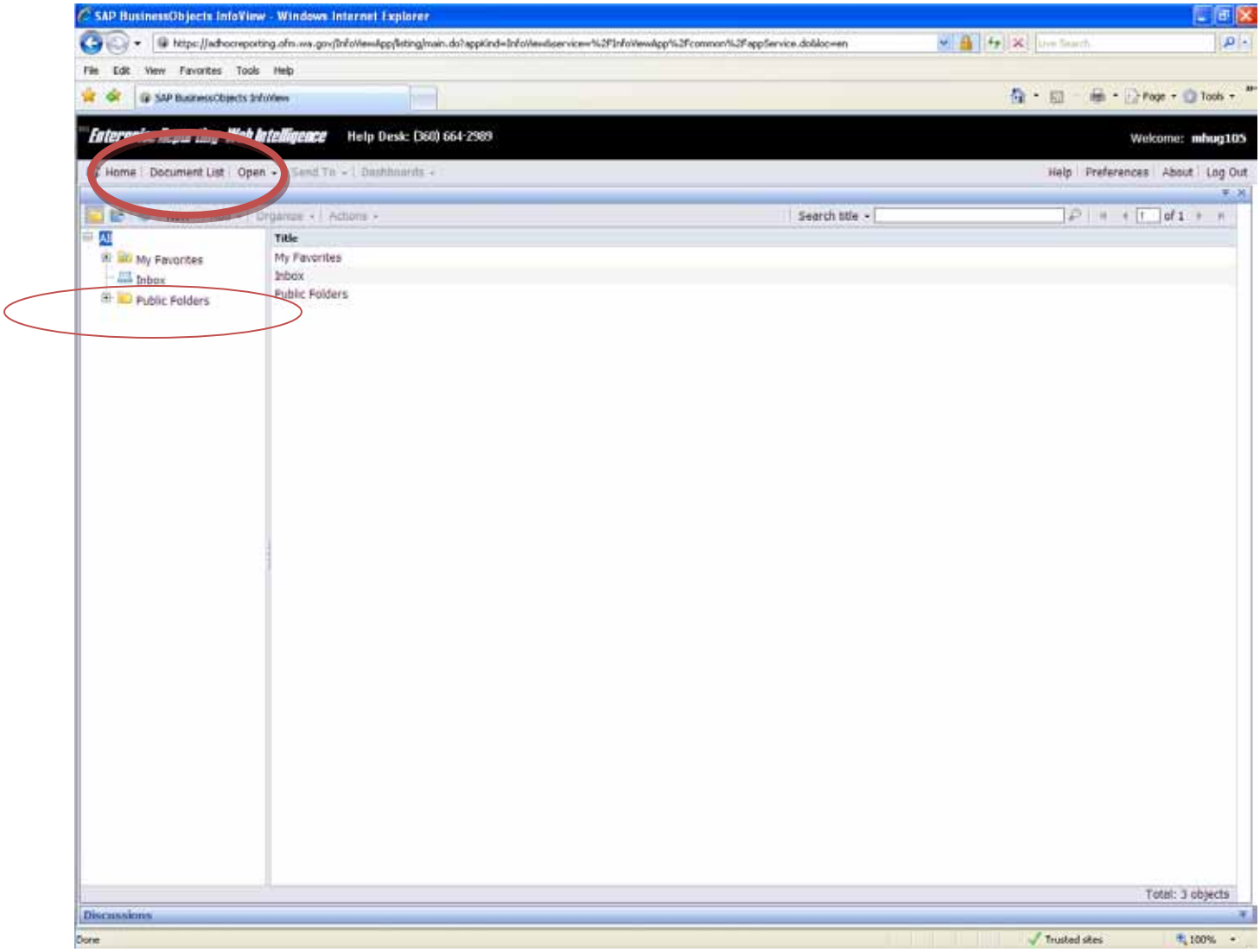
This instructional tool has been specifically designed for agency use in looking up vendor data using Webi. The vendor look up template stored in the public folder can easily be modified to meet the needs of each individual agency.

LOG INTO ENTERPRISE REPORTING WEB INTELLIGENCE TOOL



Select Document List

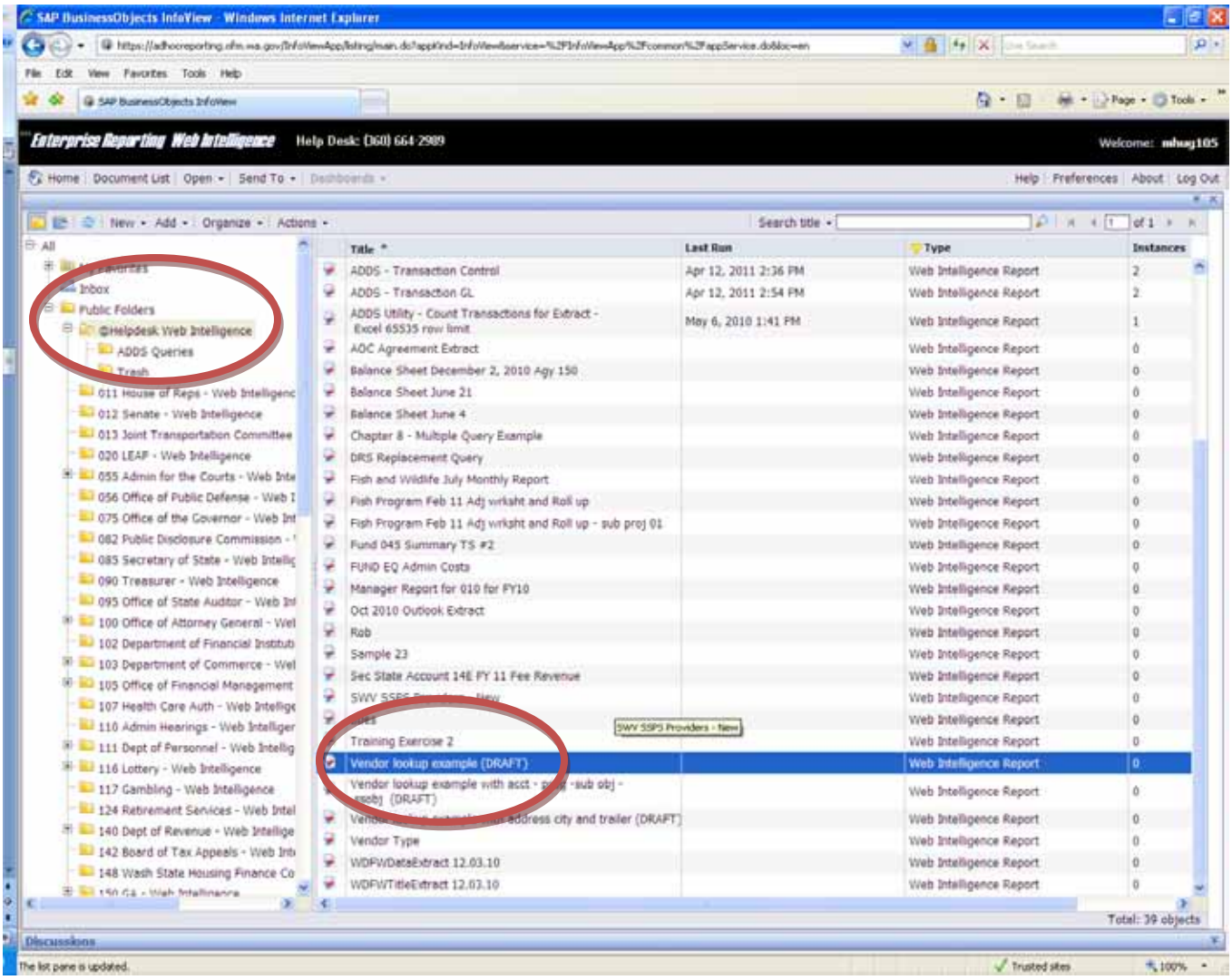
Then select Public Folders



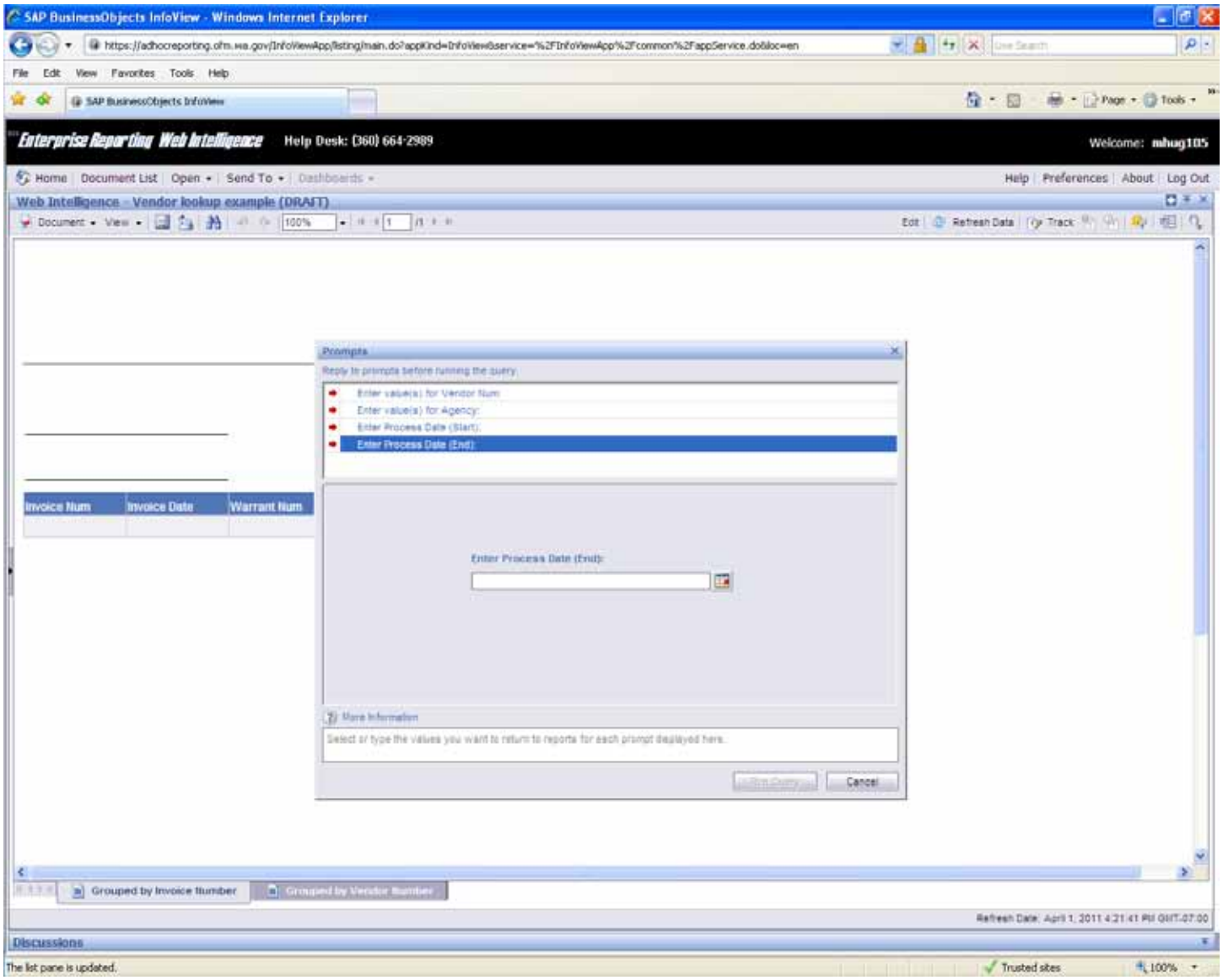
Go To Public Folders Select:

@Helpdesk

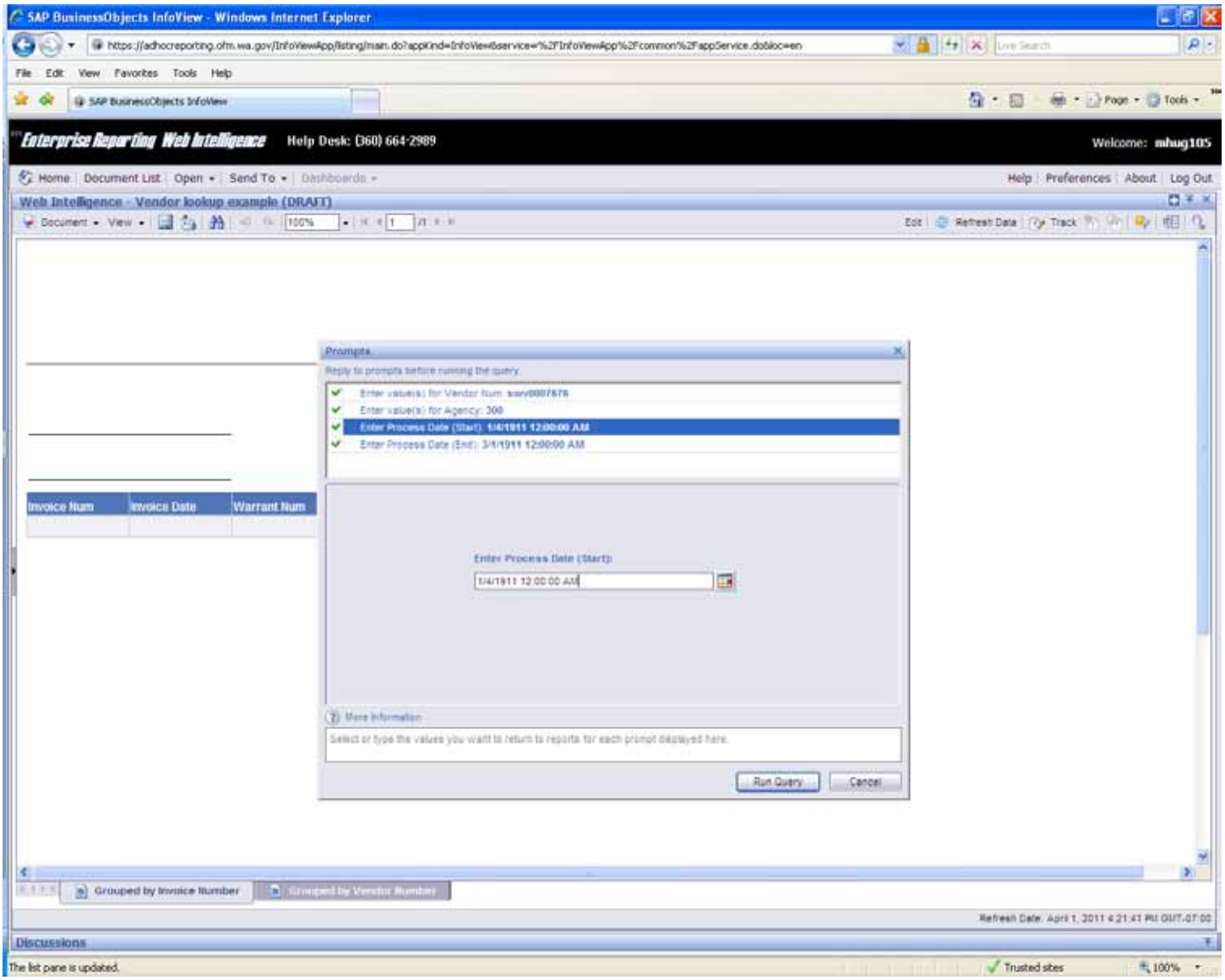
Report Vendor Lookup Example DRAFT



Main Vendor Look up Query Screen



Insert Vendor Data in Required Fields



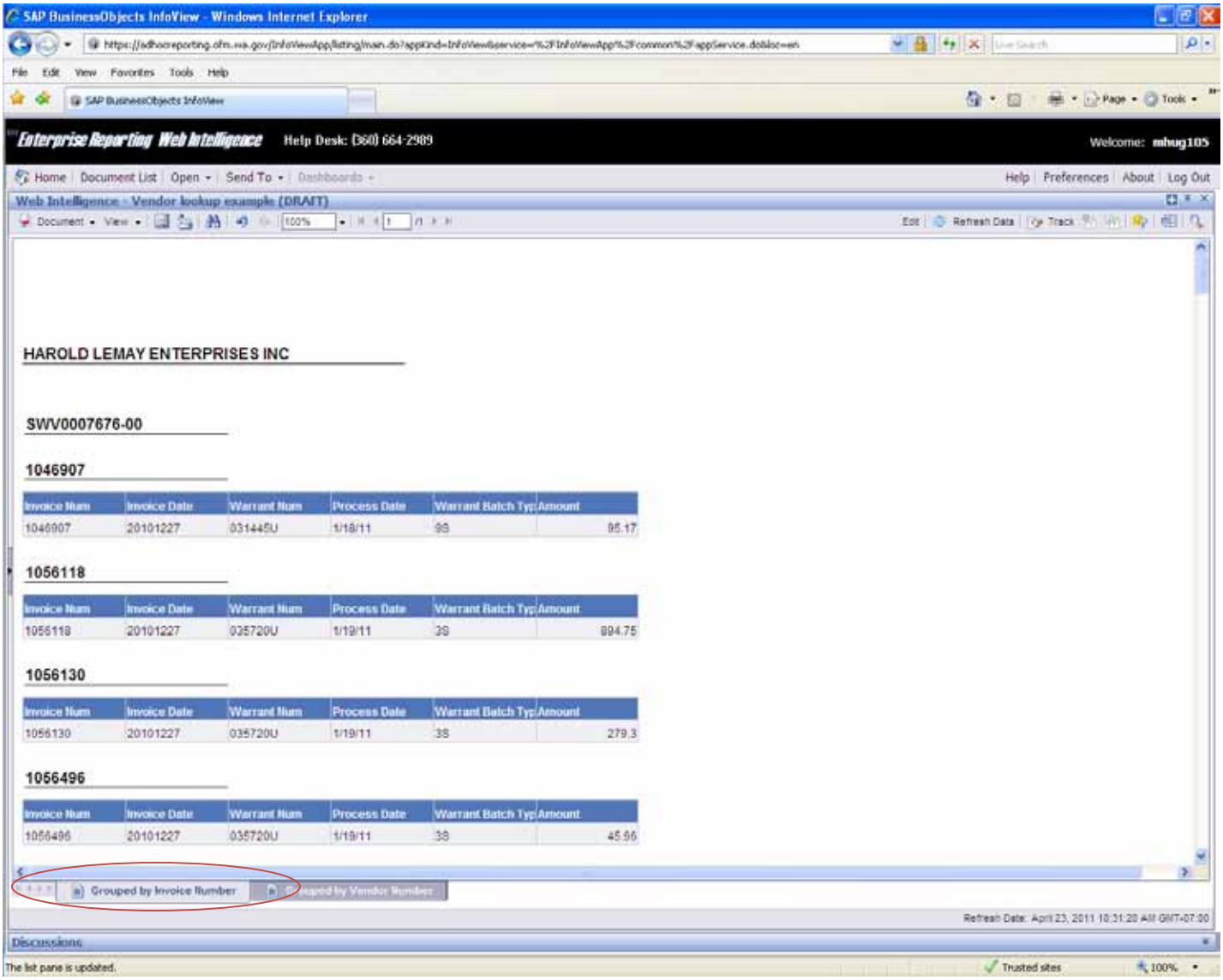
PRESTO - RESULTS

Two sets of results

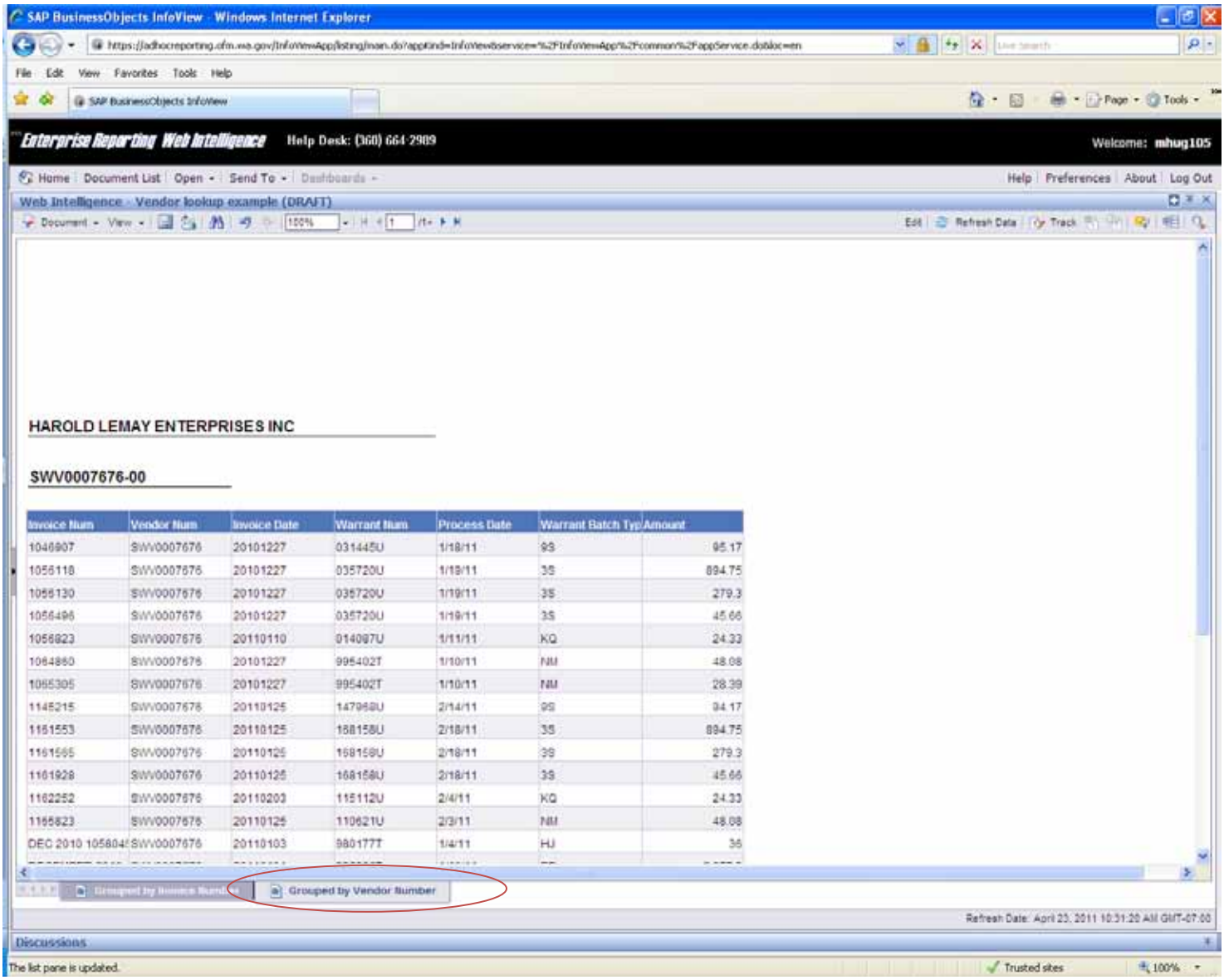
Grouped by Invoice Number (Tab 1)

Grouped by Vendor No (Tab 2)

Results provided at a summary level –



Grouped by Vendor Number (Tab 2)



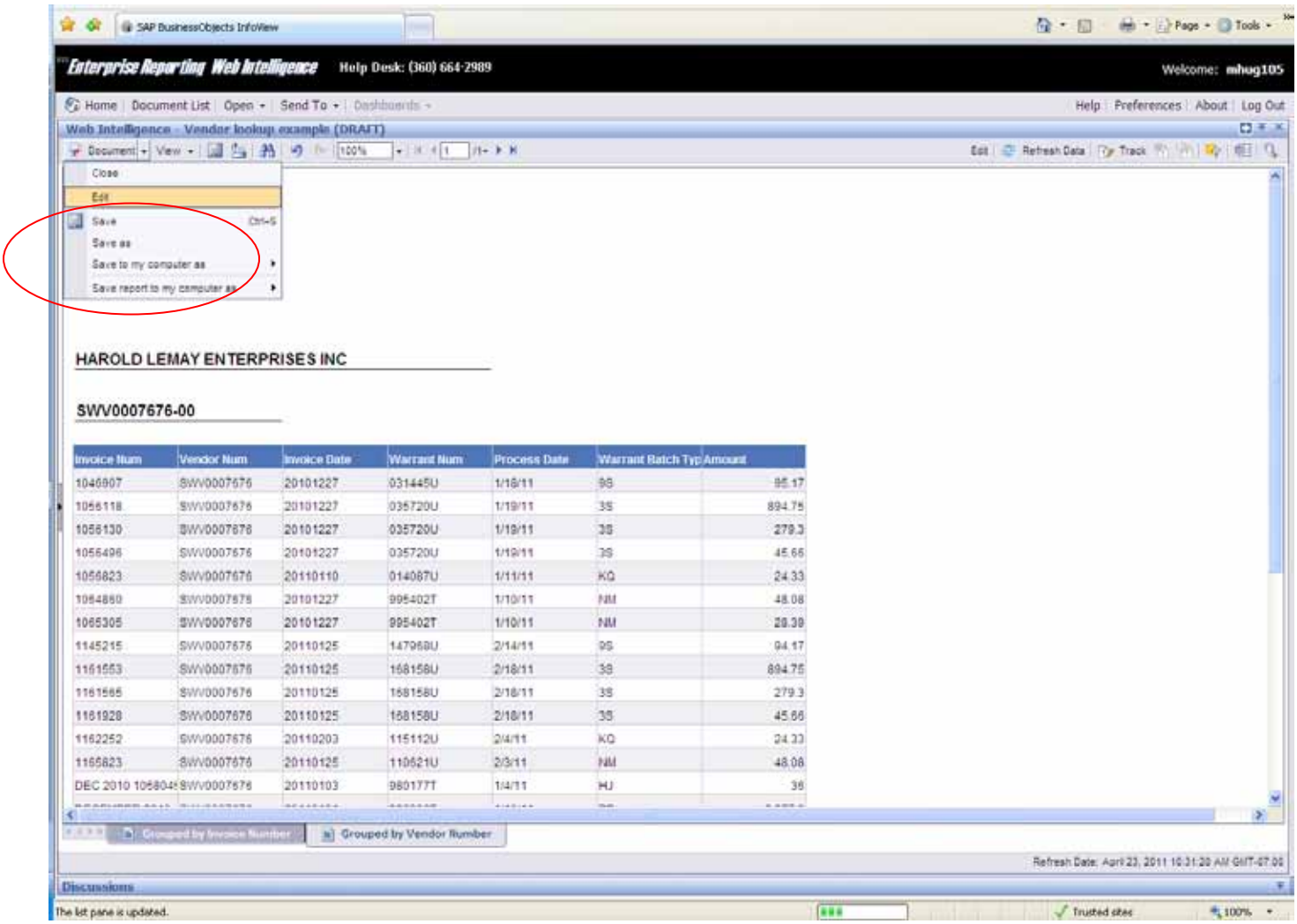
Invoice Num	Vendor Num	Invoice Date	Warrant Num	Process Date	Warrant Batch Typ	Amount
1046907	SWV0007676	20101227	031445U	1/18/11	9S	95.17
1056118	SWV0007676	20101227	035720U	1/19/11	3S	894.75
1056130	SWV0007676	20101227	035720U	1/19/11	3S	279.3
1056496	SWV0007676	20101227	035720U	1/19/11	3S	45.66
1056823	SWV0007676	20110110	014097U	1/11/11	KQ	24.33
1064860	SWV0007676	20101227	995402T	1/10/11	NM	48.08
1065305	SWV0007676	20101227	995402T	1/10/11	NM	28.39
1145215	SWV0007676	20110125	147968U	2/14/11	9S	94.17
1151553	SWV0007676	20110125	168158U	2/18/11	3S	894.75
1151565	SWV0007676	20110125	168159U	2/18/11	3S	279.3
1151928	SWV0007676	20110125	168158U	2/18/11	3S	45.66
1162252	SWV0007676	20110203	115112U	2/4/11	KQ	24.33
1165823	SWV0007676	20110125	110621U	2/3/11	NM	48.08
DEC 2010 105804	SWV0007676	20110103	980177T	1/4/11	HJ	36

NOT ENOUGH DETAIL????

Customization features:

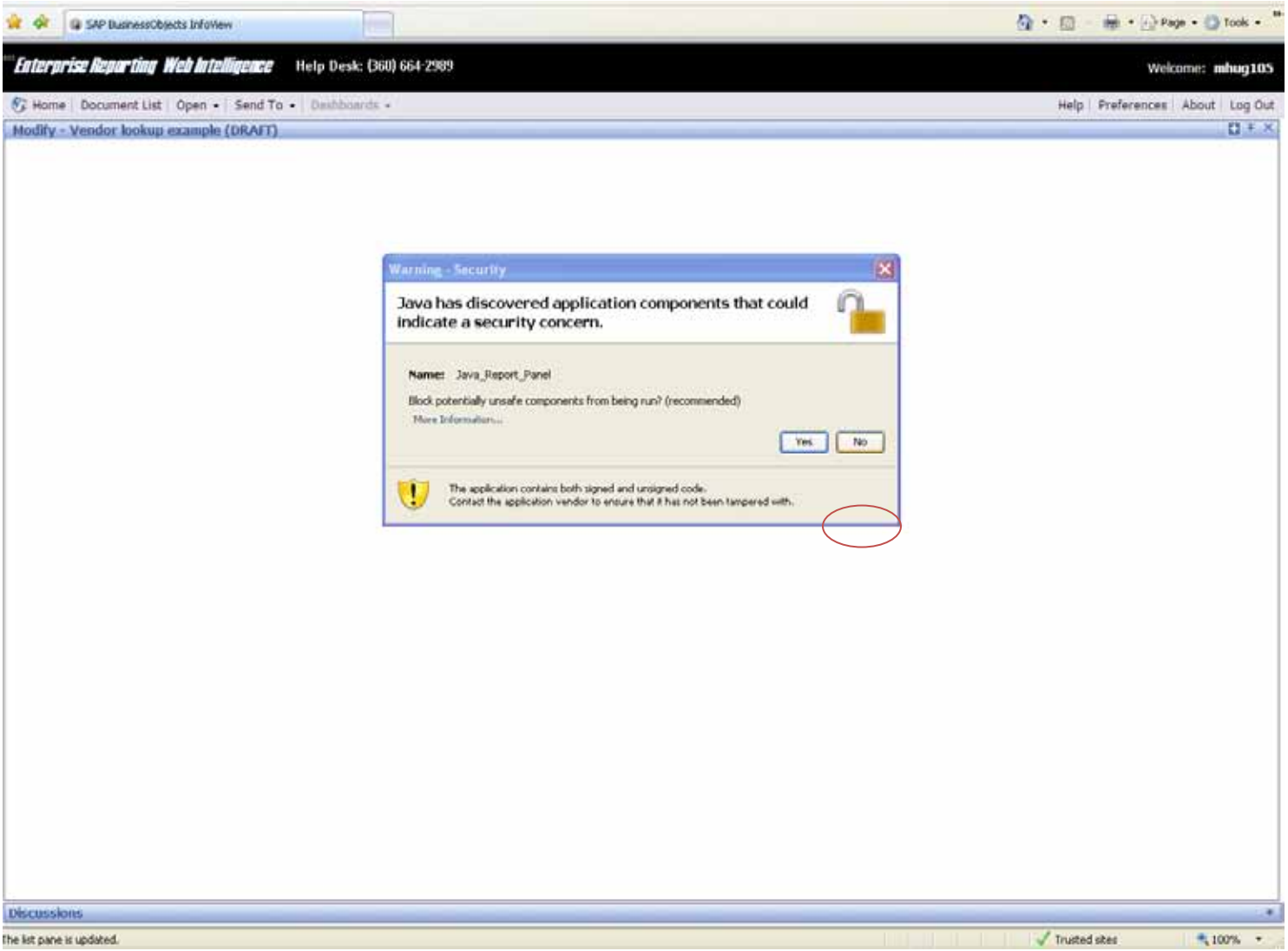
Go to Document in upper left corner

use drop down feature for edit function.



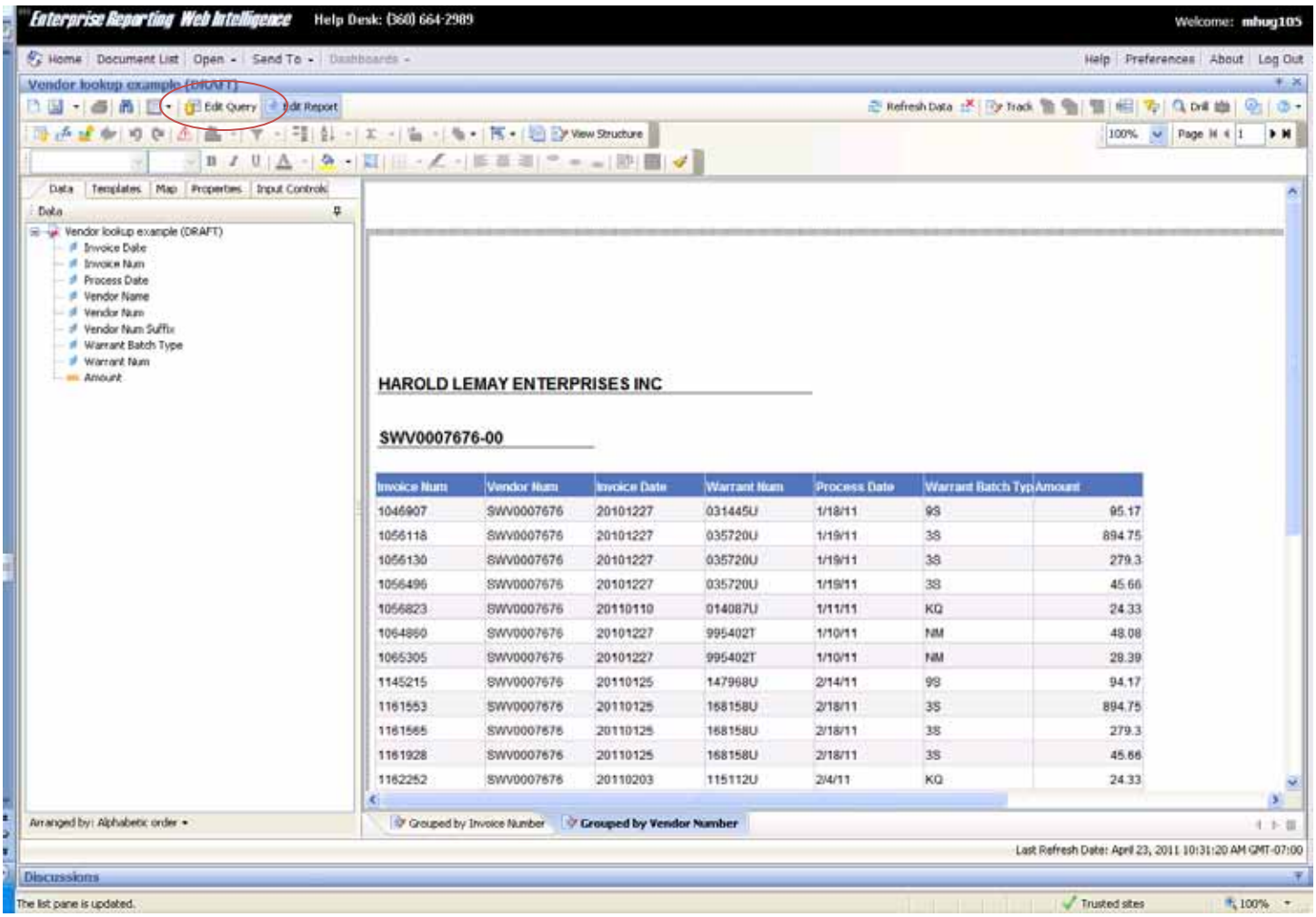
Message Screen – JAVA –

Answer or click the NO button



Few moments the following screen will appear!!

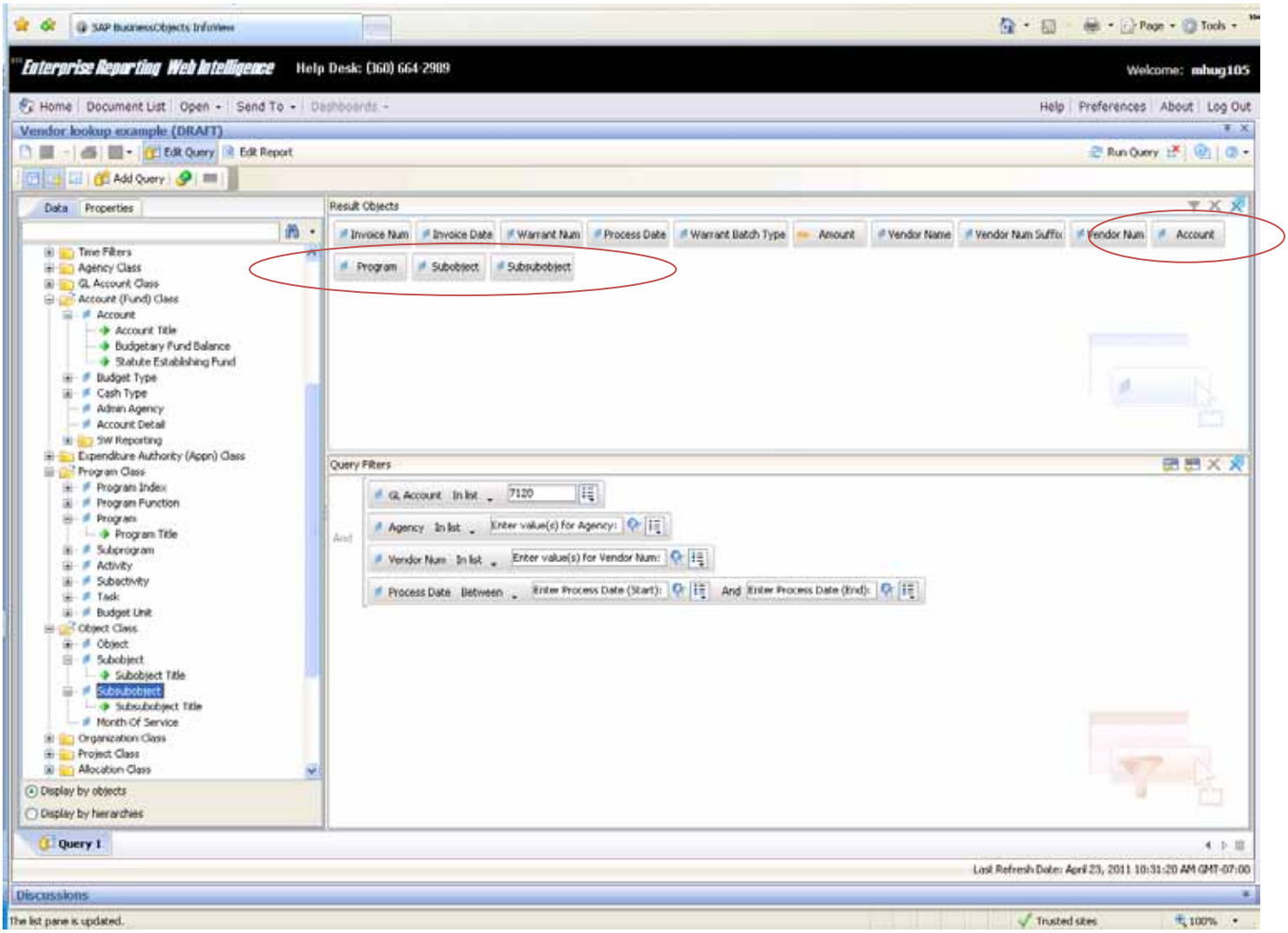
Select Edit Query



The left hand side bar for the Universe will appear select the criteria you want to add to your personalized query

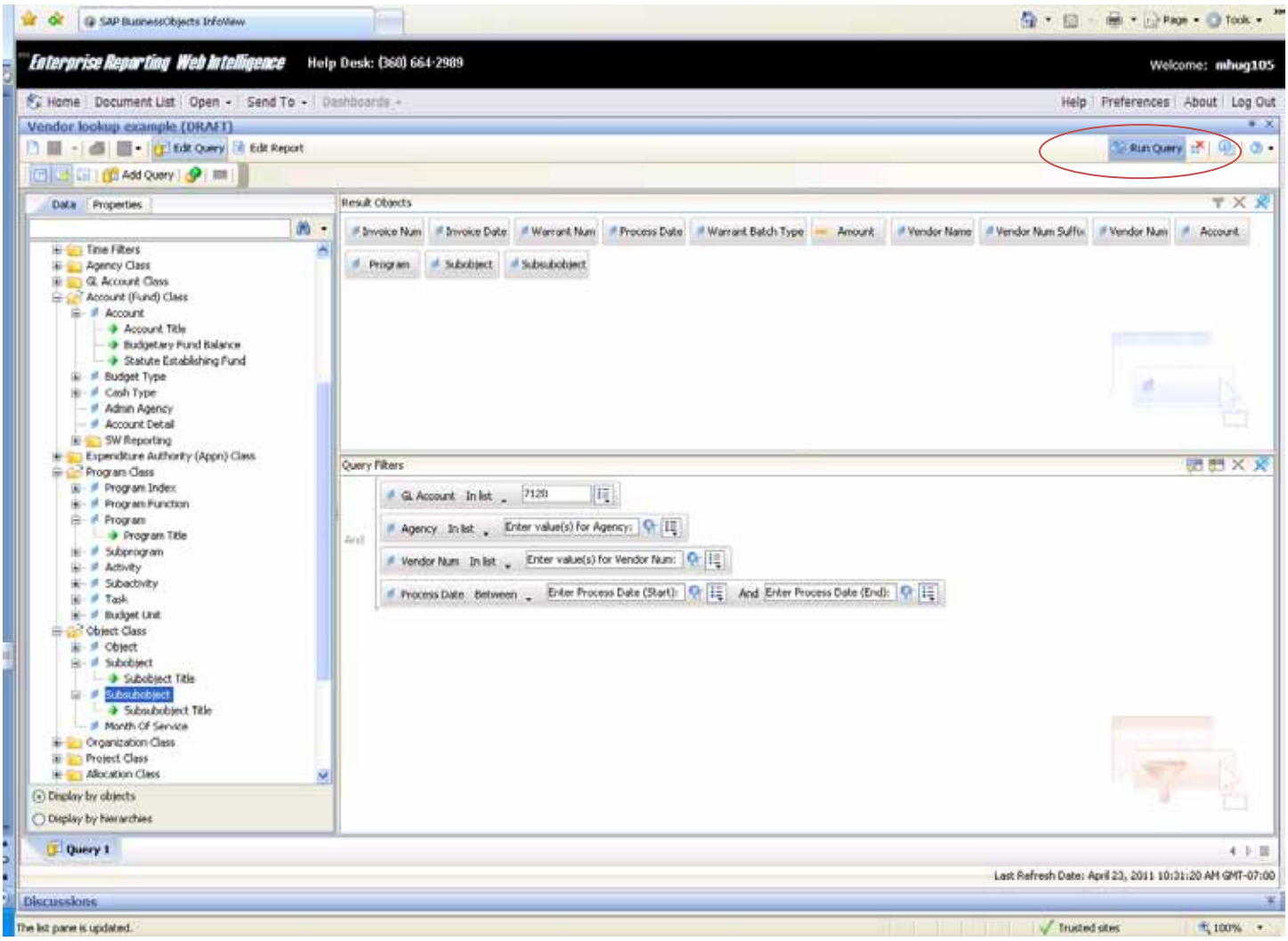
- In this example Account, Program, Sub Object and Sub sub object were added

Move the items from the left hand side bar and drop them into the upper area as indicated below



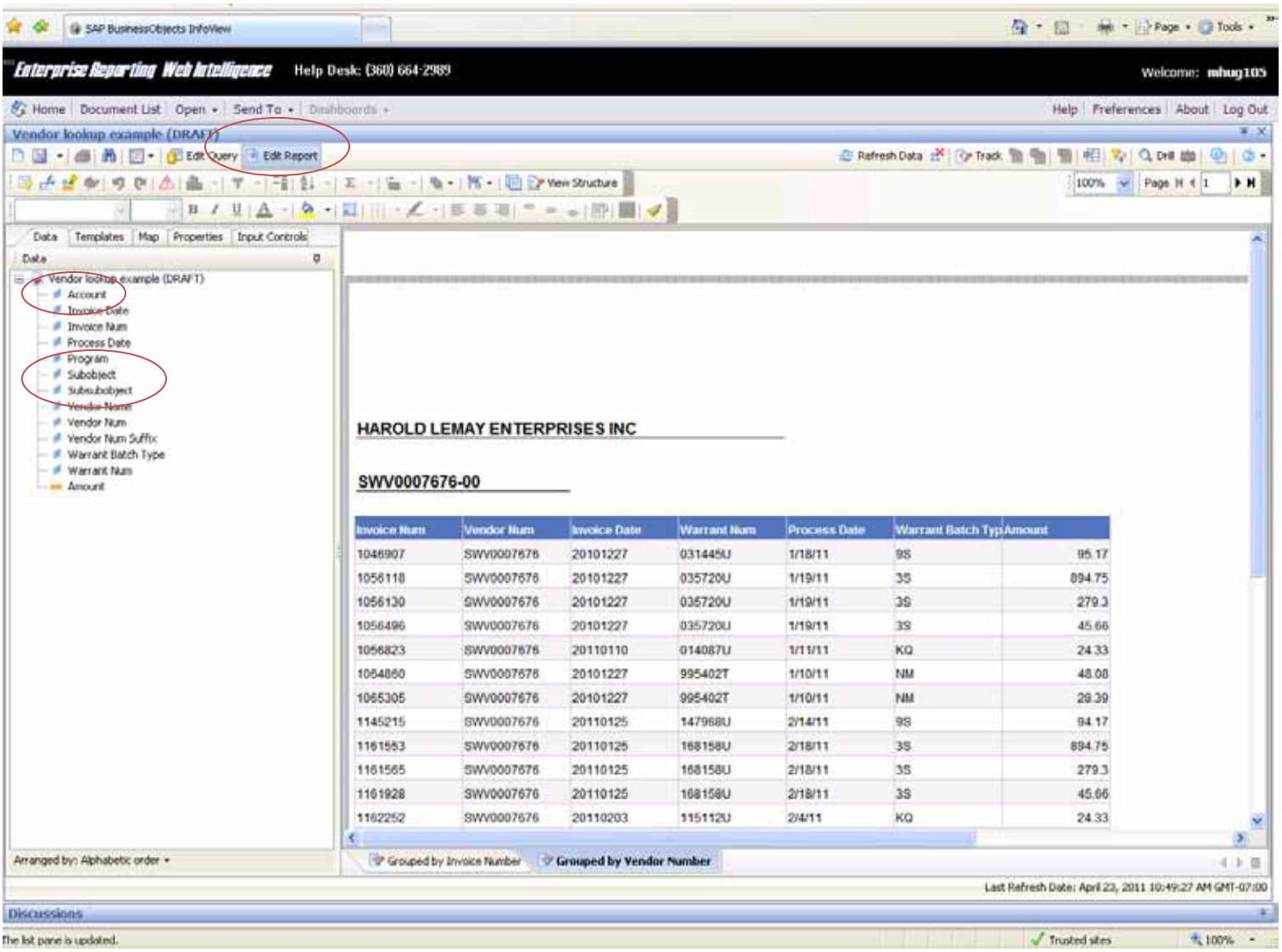
Refresh your data and input information –

At this step you will need to add your initial query data that you did earlier – It's okay it's just a refresh of the data.


SAP BusinessObjects InfoView
Enterprise Reporting Web Intelligence
Help Desk: (360) 664-2989
Welcome: mhug105
Home
Document List
Open
Send To
Dashboards
Help
Preferences
About
Log Out
Vendor lookup example (DRAFT)
Edit Query
Edit Report
Run Query
Add Query
Data
Properties
Time Filters
Agency Class
GL Account Class
Account (Fund) Class
Account
Account Title
Budgetary Fund Balance
Statute Establishing Fund
Budget Type
Cash Type
Admin Agency
Account Detail
SW Reporting
Expenditure Authority (Appn) Class
Program Class
Program Index
Program Function
Program
Program Title
Subprogram
Activity
Subactivity
Task
Budget Unit
Object Class
Object
Subobject
Subobject Title
Subsubobject
Subsubobject Title
Month Of Service
Organization Class
Project Class
Allocation Class
Display by objects
Display by hierarchies
Result Objects
Invoice Num
Invoice Date
Warrant Num
Process Date
Warrant Batch Type
Amount
Vendor Name
Vendor Num Suffix
Vendor Num
Account
Program
Subobject
Subsubobject
Query Filters
GL Account In list 7120
Agency In list Enter value(s) for Agency:
Vendor Num In list Enter value(s) for Vendor Num:
Process Date Between Enter Process Date (Start): And Enter Process Date (End):
Query 1
Last Refresh Date: April 23, 2011 10:31:20 AM GMT-07:00
Discussions
The list pane is updated.
Trusted sites
100%

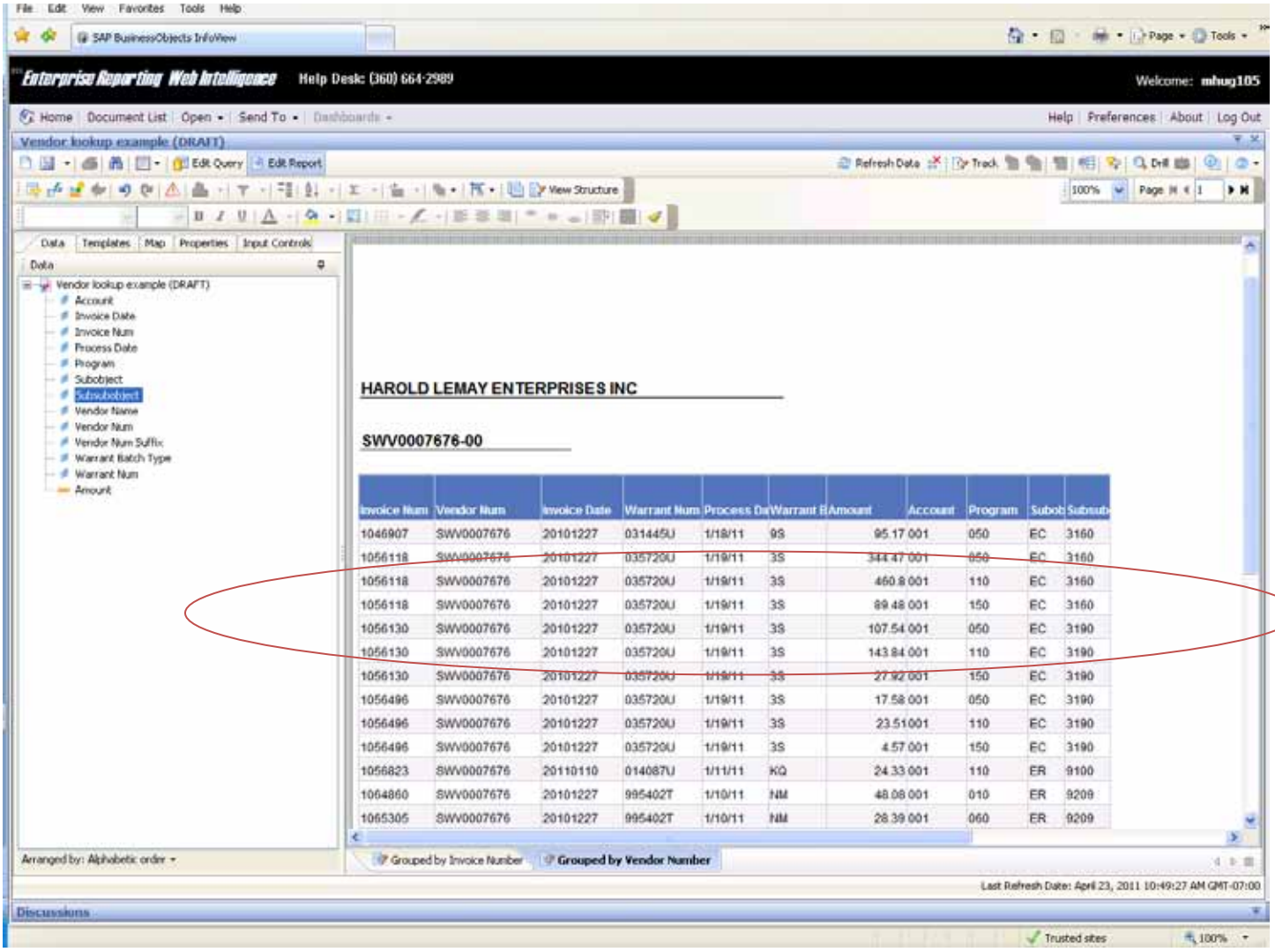
The new report fields that you selected will be viewable on the left side table see below:

Click on the new field and move it with the mouse and drop where you would like this information displayed on your report.

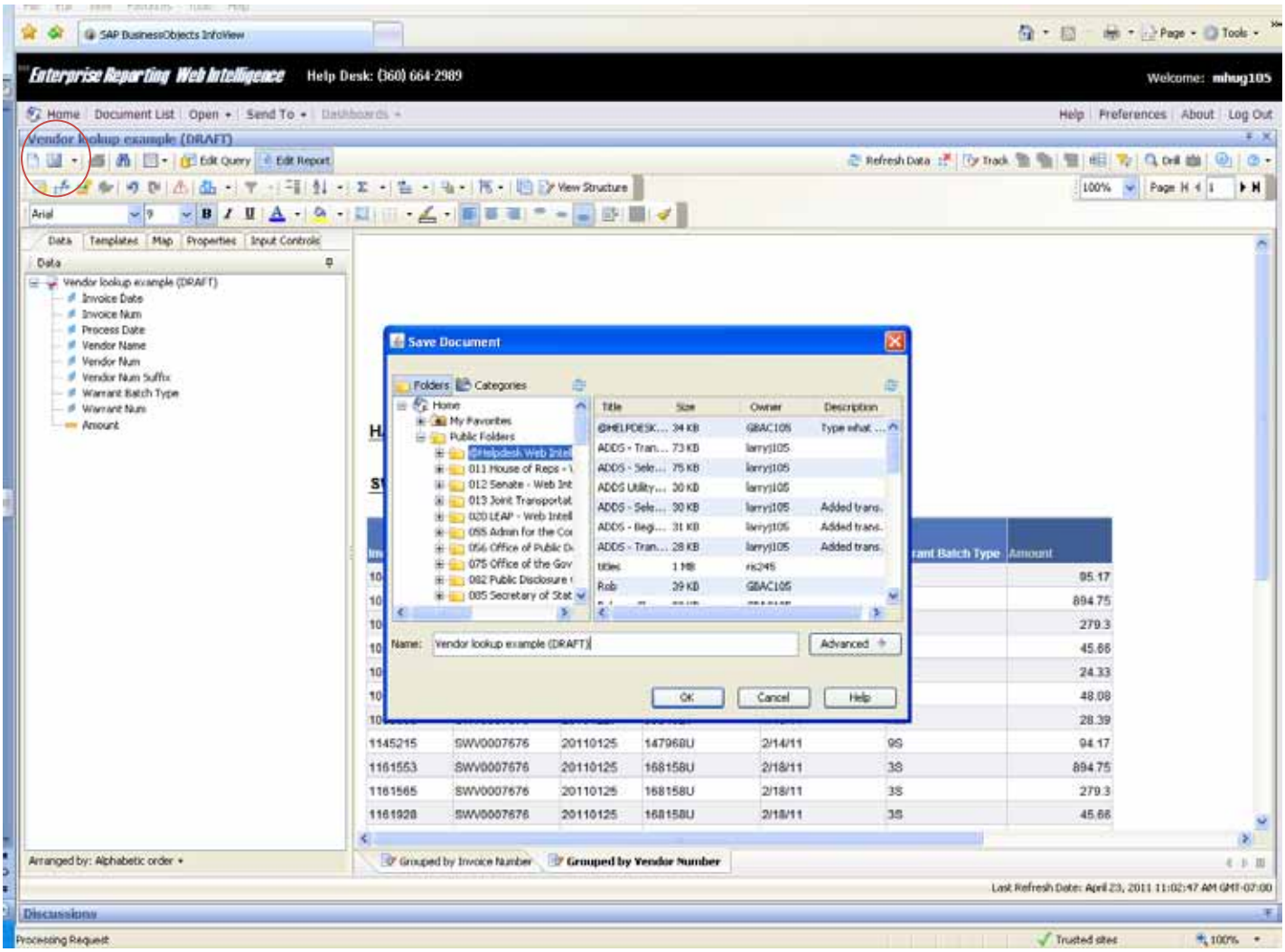


Once you have moved all your new fields your report will refresh with new information –

Please note that the Invoice number on this report is no longer at a summary level - additional summary breakdowns have occurred based on my changes. (You can adjust your columns widths just like excel to make them narrower)



Invoice Num	Vendor Num	Invoice Date	Warrant Num	Process Da	Warrant B	Amount	Account	Program	Subob	Subsub
1046907	SWV0007676	20101227	031445U	1/18/11	9S	95.17	001	050	EC	3160
1056118	SWV0007676	20101227	035720U	1/19/11	3S	344.47	001	050	EC	3160
1056118	SWV0007676	20101227	035720U	1/19/11	3S	460.8	001	110	EC	3160
1056118	SWV0007676	20101227	035720U	1/19/11	3S	89.48	001	150	EC	3160
1056130	SWV0007676	20101227	035720U	1/19/11	3S	107.54	001	050	EC	3190
1056130	SWV0007676	20101227	035720U	1/19/11	3S	143.84	001	110	EC	3190
1056130	SWV0007676	20101227	035720U	1/19/11	3S	27.92	001	150	EC	3190
1056496	SWV0007676	20101227	035720U	1/19/11	3S	17.58	001	050	EC	3190
1056496	SWV0007676	20101227	035720U	1/19/11	3S	23.51	001	110	EC	3190
1056496	SWV0007676	20101227	035720U	1/19/11	3S	4.57	001	150	EC	3190
1056823	SWV0007676	20110110	014087U	1/11/11	KQ	24.33	001	110	ER	9100
1064860	SWV0007676	20101227	995402T	1/10/11	NM	48.08	001	010	ER	9209
1065305	SWV0007676	20101227	995402T	1/10/11	NM	28.39	001	060	ER	9209

If you like what you have created you can save - Remember to use Save As so that you do not lose your original query.

You can save to your own folder or to a public shared folder within your agency make the necessary selections on the screen illustrated below.