

Enterprise Reporting

Introduction to Web Intelligence



"the consolidated technology services agency -RCW 43.105.006"

- Your name?
- Your agency?
- Any experience with Enterprise Reporting (ER)?
- How do you expect to use ER Web Intelligence?

Course Objectives

At the conclusion of class participants should have an understanding of the tool's basic features:

- Logon
- View Reports
- Create New Documents
- Insert totals / subtotals
- Schedule Reports
- Navigate
- Edit existing Documents
- Breaks
- Sorting
- Print / Export Reports

Chapter 1

Overview



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Web Intelligence vs. Standard Reports

Standard Reports

- Pre-defined reports
- Report scheduling and viewing application

Web Intelligence

- Self service reporting
- For querying, organizing, and analyzing data

ER Hours of Operation

- 24/7 for viewing reports
- Daily AFRS Data updates are from 8 pm through Midnight – New and existing AFRS queries cannot be generated during this time

System Maintenance – Between 12:00 am and 7:30 am on the first Monday of every month

Getting Support

- 8:00 a.m. to 5:00 p.m. Monday through Friday
- 360-407-9100
- solutionscenter@watech.wa.gov

Chapter 2

Web Intelligence Access



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Web Intelligence access

Web Intelligence customers must have online access either through the State Governmental Network (SGN) or through Secure Access WA (SAW) for use from outside of the state firewall.

This guide only includes information for access within the SGN.

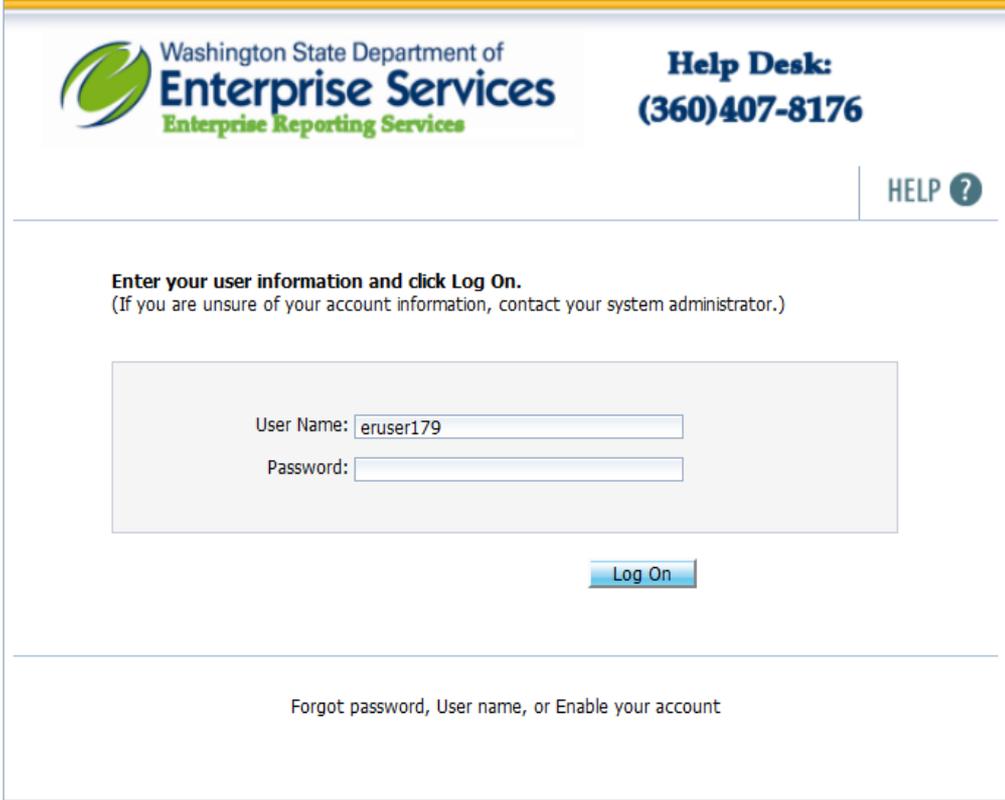
For access using SAW please consult the instructions at:

http://des.wa.gov/SiteCollectionDocuments/ITSolutions/EnterpriseReporting/SAW_Instructions/BO_4.0_SAW_Instructions.pdf

Access through SGN

Type <https://reporting.des.wa.gov> into the address bar of your internet browser and click **Go**, or press [Enter].

1. Enter your assigned User Name in the **User Name** field
2. Enter your Password in the **Password** field.
 - This application requires a hardened password. Refer to the password guidelines on the next page.
3. Click the **Log On** button or press [Enter] to initiate a connection to the Web Intelligence.



The screenshot shows the login interface for the Washington State Department of Enterprise Services. At the top left is the logo for Enterprise Reporting Services. To the right, the text reads "Washington State Department of Enterprise Services" and "Enterprise Reporting Services". Further right, the "Help Desk" contact information is listed as "(360)407-8176". A "HELP ?" link is located in the top right corner. Below the header, a message instructs the user to "Enter your user information and click Log On." and provides a note: "(If you are unsure of your account information, contact your system administrator.)". The login form contains two input fields: "User Name:" with the value "eruser179" and "Password:". A "Log On" button is positioned below the password field. At the bottom of the page, there is a link for "Forgot password, User name, or Enable your account".

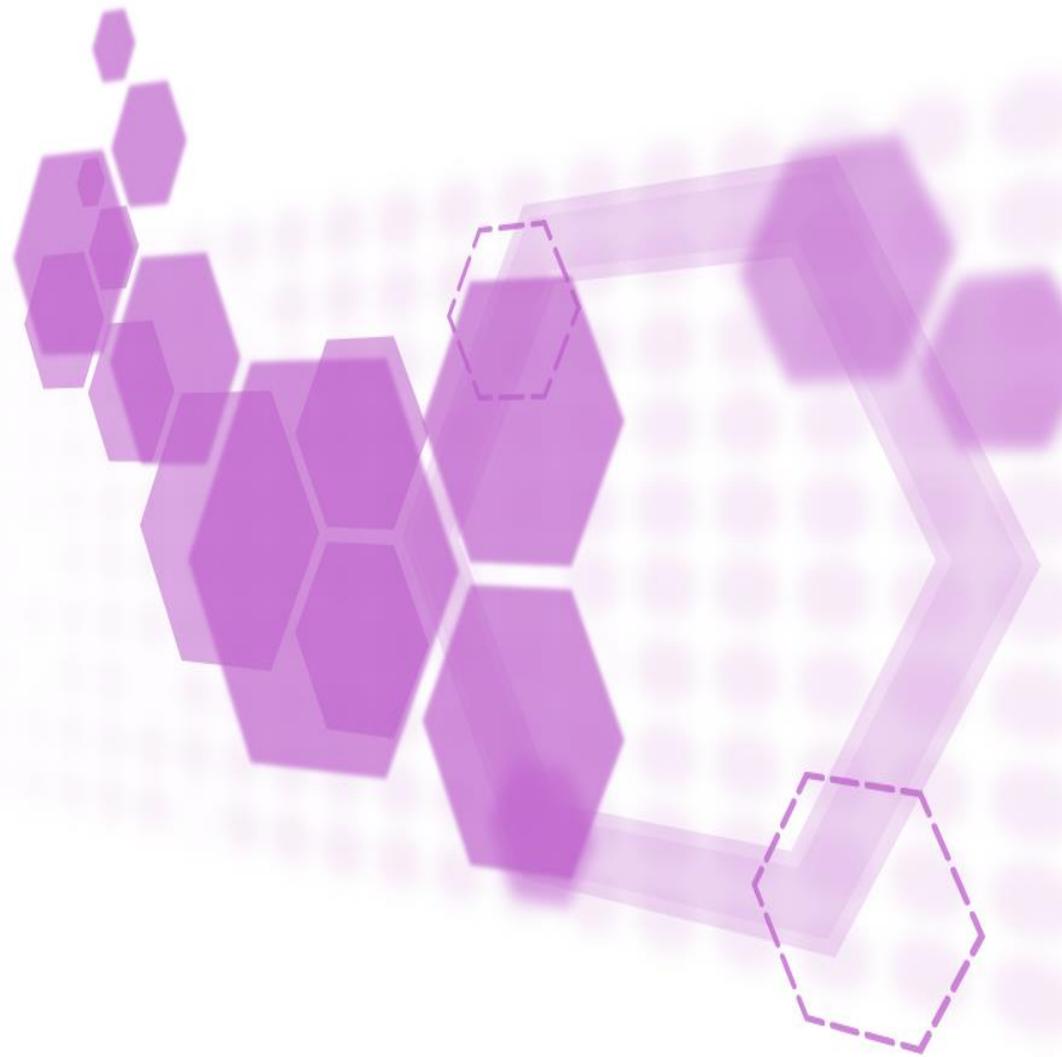
Password Requirements

The hardened password criteria is as follows:

- Password must be at least eight characters long.
- Password must contain at least two of the following character classes: upper case letters, lower case letters, numerals, and special characters. It cannot contain your logon ID.
- Password must be changed every 120 days.
- After five incorrect logon attempts, your user account will be locked.

Chapter 3

BI Launch Pad Navigation



BI Launch Pad Navigation

The “Home” tab allows for quick access to:

1. Recently Viewed Reports
2. Unread Business Objects Inbox Items
3. Recently Run Reports
4. Unread Alerts (Currently not in use)
5. Applications

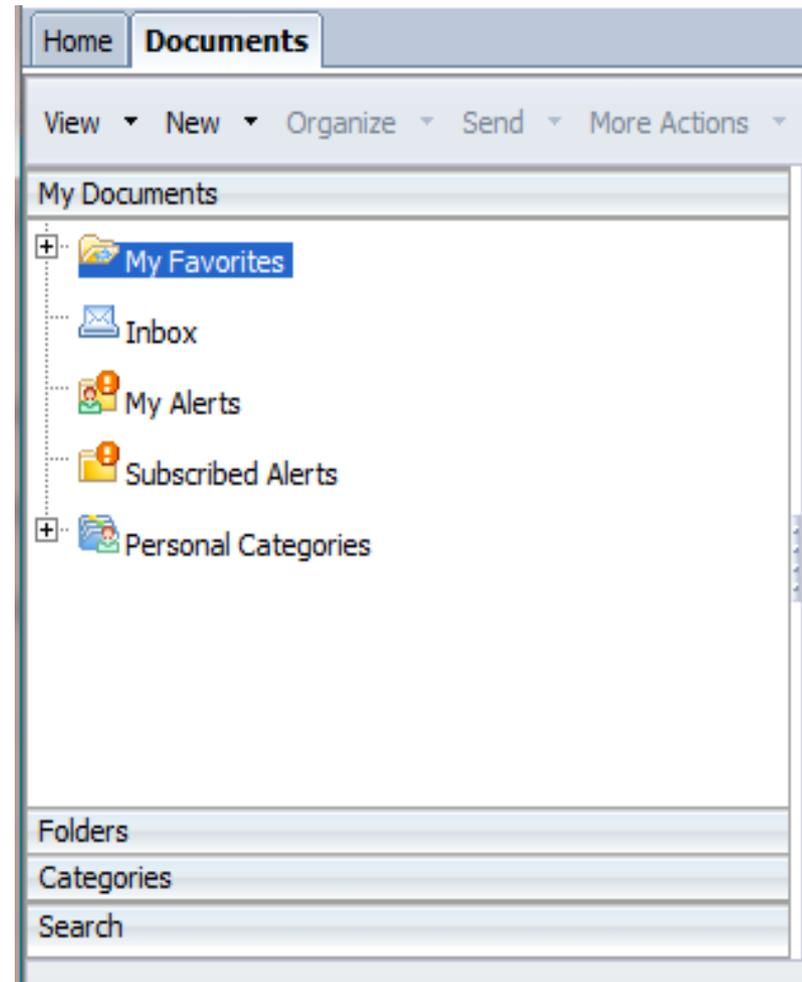
The screenshot shows the BI Launch Pad Home page. The page header includes the Washington State Department of Enterprise Services logo, a Help Desk contact number (360)407-8175, and a navigation menu with options for Applications, Preferences, Help Menu, and Log Off. The main content area is divided into five sections, each with a numbered callout:

- 1**: My Recently Viewed Documents (No recently viewed documents)
- 2**: 0 Unread Messages in My Inbox (No unread messages)
- 3**: My Recently Run Documents (No recently run documents)
- 4**: 0 Unread Alerts (No unread alerts)
- 5**: My Applications (A vertical list of application icons)

Each section also includes a "See More..." link.

The “Documents” tab allows access to

- My Documents – Access to personal documents. Other users will not have access to these documents.
- Folders – Access to Agency and other public folders.
- Personal Categories – Allows users to group reports that are used frequently together regardless of their folder.
- Search – Allow users to search for documents and objects stored in Web Intelligence.



Chapter 4

Creating New Web Intelligence Documents



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Creating New Web Intelligence Documents

A Web Intelligence document consists of a query, a report and any formulas or variables created.

The document can be very simple or very complex, depending on the user's business need at the time.

The data is represented in Web Intelligence as a universe. A Universe provides an easy to use and understand data structure for non technical Web Intelligence users to run queries against a database to create reports and perform data analysis.

You build queries using the universe objects. When the query is ran, the request is sent to the database, and the result is returned to the tool in a report, in the form of a table, consisting of columns and rows.

Creating New Web Intelligence Document

1. To create a new Web Intelligence document , click on the **Web Intelligence** icon in the **My Applications** panel.

Washington State Department of
Enterprise Services Help Desk:
Enterprise Reporting Services (360)407-8176

Welcome: **Enterprise Reporting** | Applications ▾ Preferences Help Menu ▾ | Log Off

Home Documents Crosswalk New Document

Recently Viewed Documents

- New Document
- my report
- Crosswalk
- Sample Report
- Cash Receipts Register

0 Unread Messages in My Inbox

No unread messages

See More...

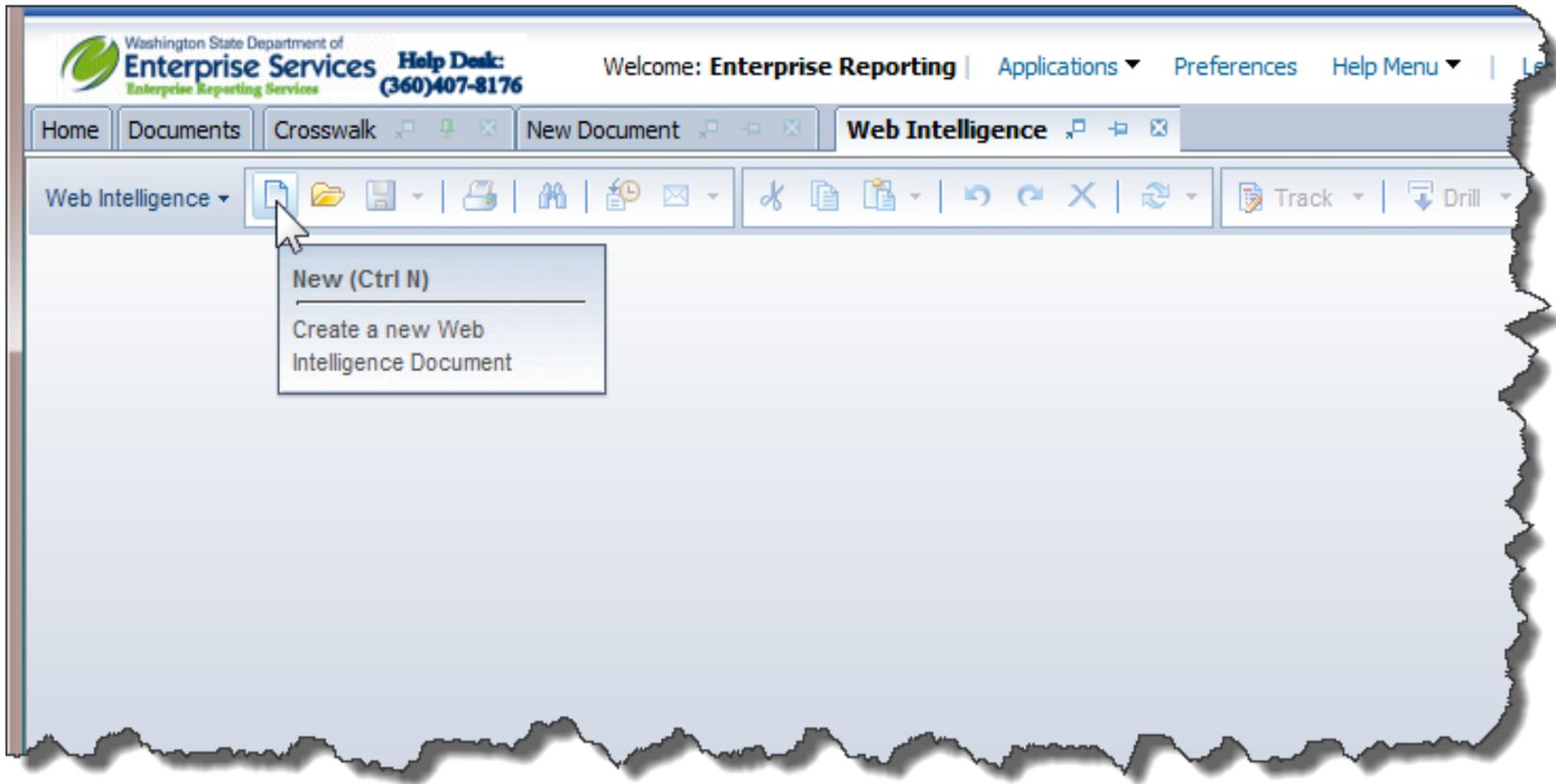
My Applications

My Recently Run Documents

0 Unread Alerts

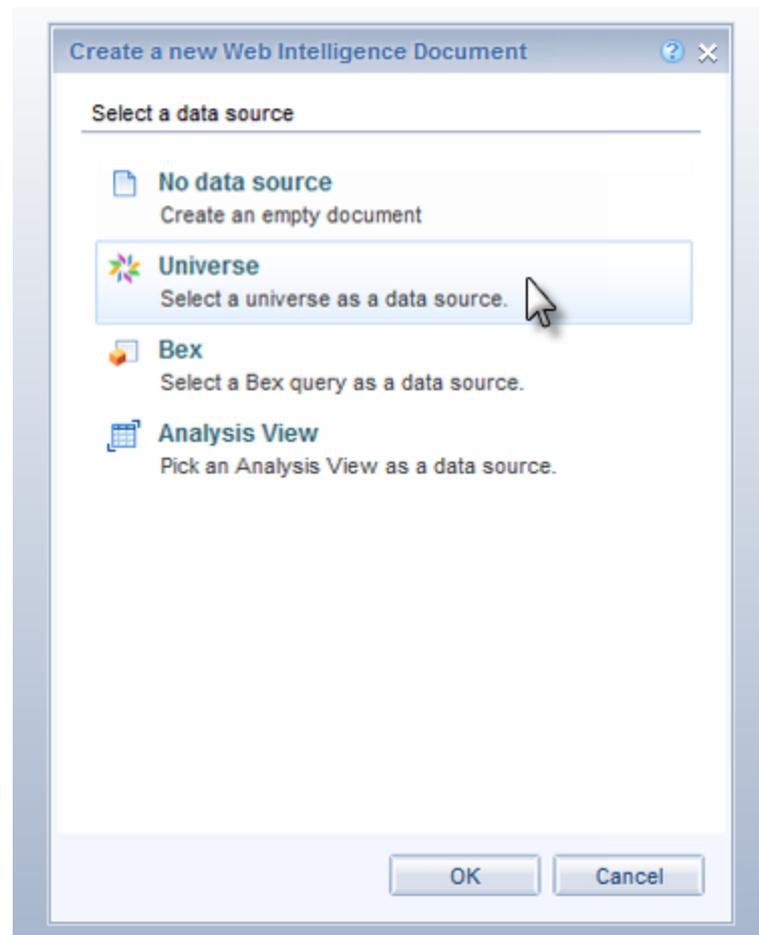
Creating New Web Intelligence Document

2. Click on **New** in the Web Intelligence Toolbar



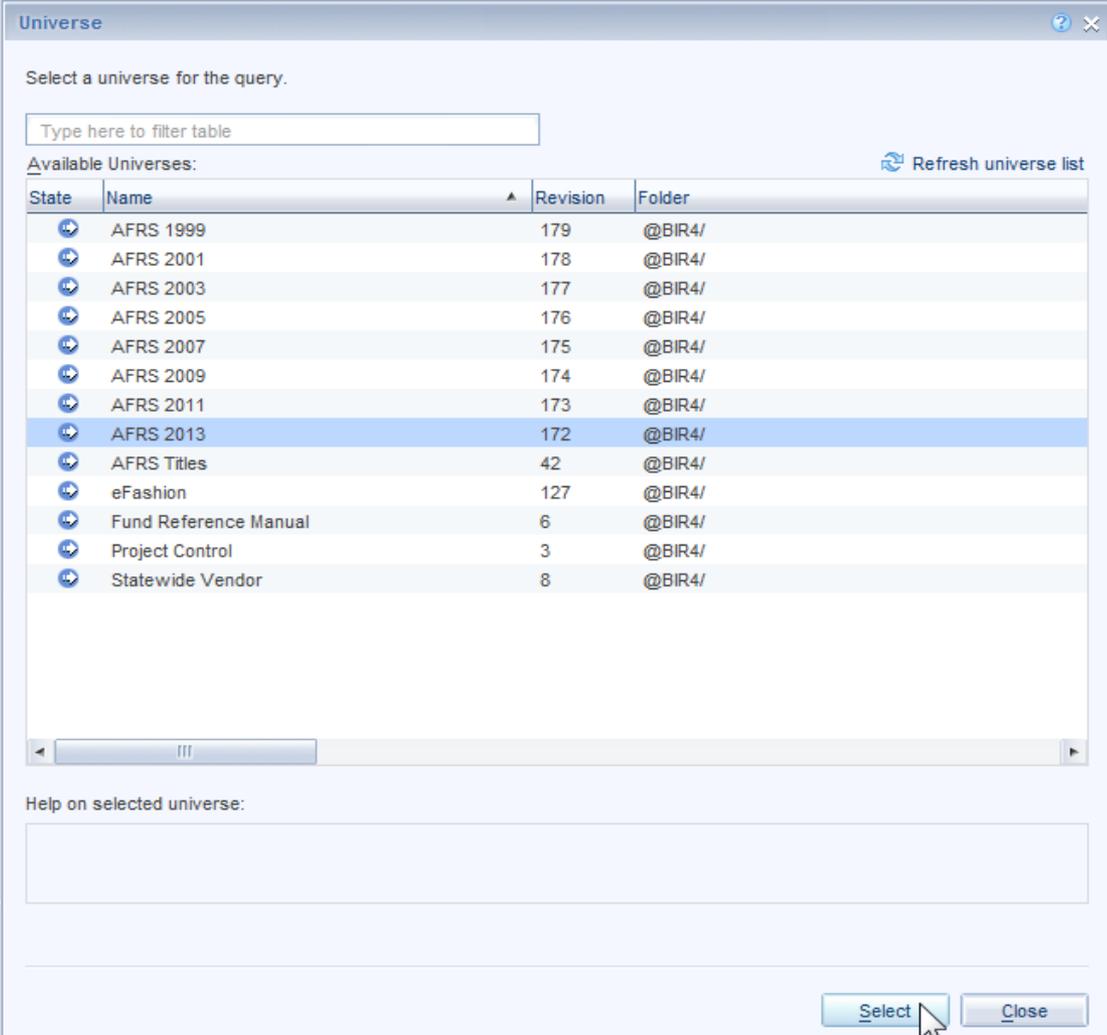
Creating New Web Intelligence Document

3. Select **Universe**, and click **OK**.



Creating New Web Intelligence Document

4. Select a universe. If a default universe is proposed, you can use this universe or select a different universe.
5. Click **Select**



Universe

Select a universe for the query.

Type here to filter table

Available Universes: Refresh universe list

State	Name	Revision	Folder
↕	AFRS 1999	179	@BIR4/
↕	AFRS 2001	178	@BIR4/
↕	AFRS 2003	177	@BIR4/
↕	AFRS 2005	176	@BIR4/
↕	AFRS 2007	175	@BIR4/
↕	AFRS 2009	174	@BIR4/
↕	AFRS 2011	173	@BIR4/
↕	AFRS 2013	172	@BIR4/
↕	AFRS Titles	42	@BIR4/
↕	eFashion	127	@BIR4/
↕	Fund Reference Manual	6	@BIR4/
↕	Project Control	3	@BIR4/
↕	Statewide Vendor	8	@BIR4/

Help on selected universe:

Select Close

Creating New Web Intelligence Document

A universe contains the following structures:

Classes

A class is a logical grouping of objects within a universe. It represents a category of objects. A class can be divided hierarchically into subclasses.

Objects

An object is a named component that maps to data or a derivation of data in the database.

Types of objects

- Dimension 🏠 - Parameters for analysis. Dimensions typically relate to a hierarchy such as geography, product, or time. For example: Agency Code
- Detail 🌟 - Provides a description of a dimension, but are not the focus for analysis. For example: Agency Title
- Measure 📊 - Conveys numeric information which is used to quantify a dimension object. For example: Amount

Creating New Web Intelligence Document

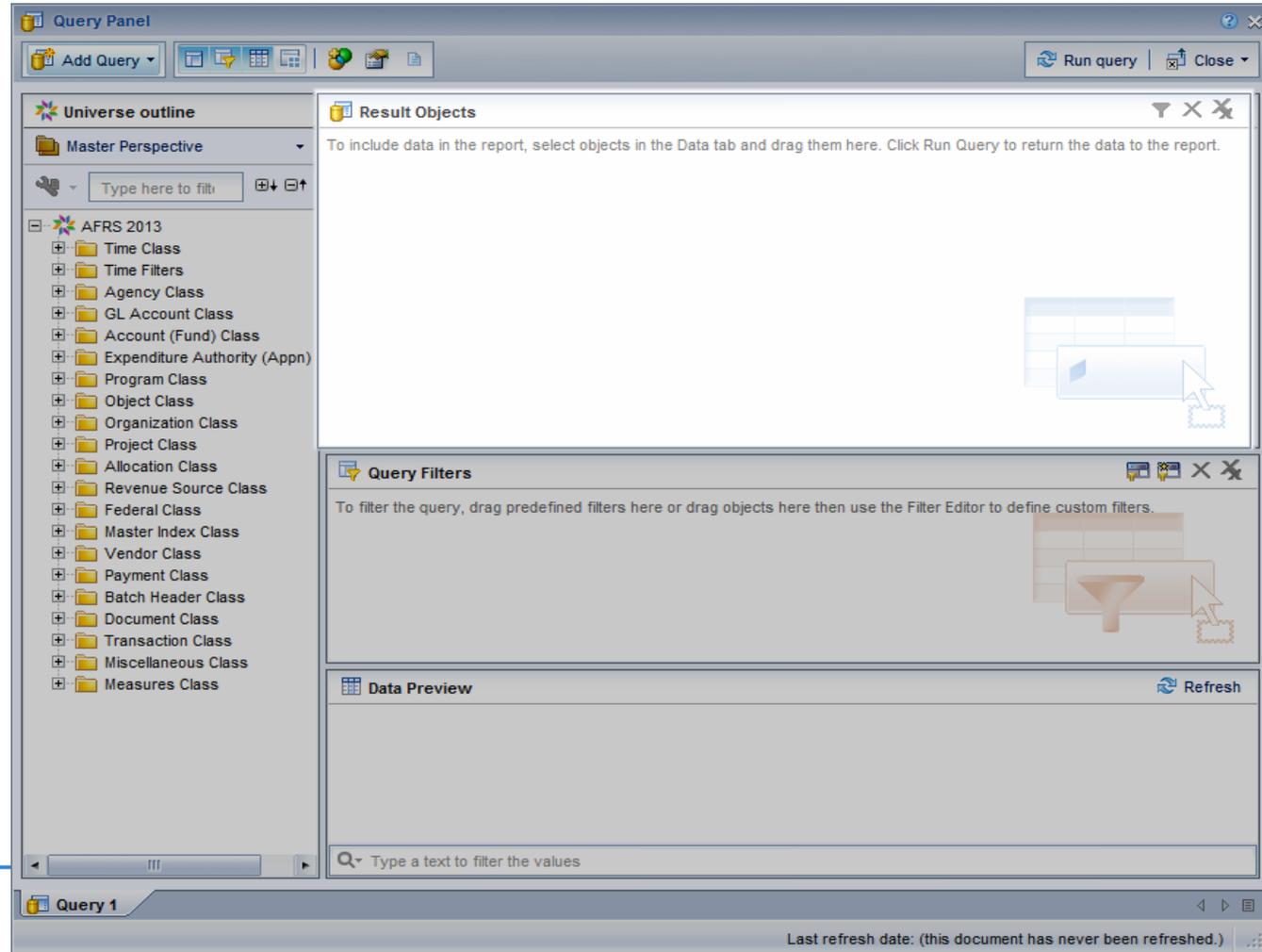
Data Outline Panel – Shows the universe and its classes and objects that are available for reporting.

The screenshot displays the Query Panel interface with the following components:

- Query Panel** (Title Bar): Includes "Add Query", "Run query", and "Close" buttons.
- Universe outline**: Shows the "Master Perspective" and a search box "Type here to filter". The tree structure includes:
 - AFRS 2013
 - Time Class
 - Time Filters
 - Agency Class
 - GL Account Class
 - Account (Fund) Class
 - Expenditure Authority (Appn)
 - Program Class
 - Object Class
 - Organization Class
 - Project Class
 - Allocation Class
 - Revenue Source Class
 - Federal Class
 - Master Index Class
 - Vendor Class
 - Payment Class
 - Batch Header Class
 - Document Class
 - Transaction Class
 - Miscellaneous Class
 - Measures Class
- Result Objects**: Contains the instruction "To include data in the report, select objects in the Data tab and drag them here. Click Run Query to return the data to the report." and a grid icon.
- Query Filters**: Contains the instruction "To filter the query, drag predefined filters here or drag objects here then use the Filter Editor to define custom filters." and a funnel icon.
- Data Preview**: Contains a "Refresh" button and a search box "Type a text to filter the values".
- Footer**: Shows "Query 1" and "Last refresh date: (this document has never been refreshed.)".

Creating New Web Intelligence Document

Results Object Panel – Objects selected and placed here will be displayed in the report.



Creating New Web Intelligence Document

Query Filter Panel – Where objects are added to define how to limit the data returned in a query.

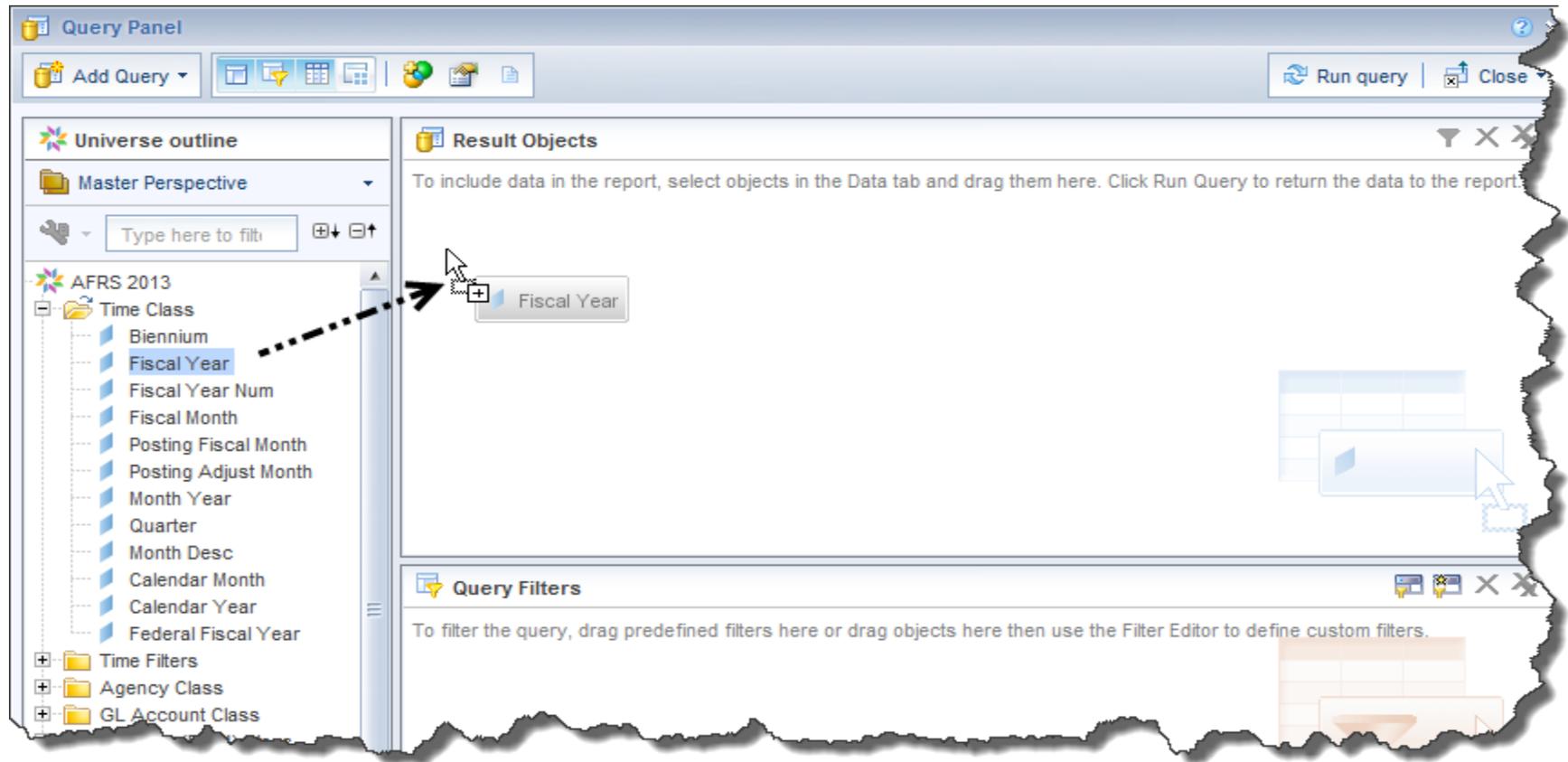
The screenshot displays the 'Query Panel' window, which is used for defining and executing queries. The interface is divided into several sections:

- Universe outline:** A tree view on the left showing the 'Master Perspective' and a list of classes under 'AFRS 2013', including Time Class, Agency Class, GL Account Class, Account (Fund) Class, Expenditure Authority (Appn), Program Class, Object Class, Organization Class, Project Class, Allocation Class, Revenue Source Class, Federal Class, Master Index Class, Vendor Class, Payment Class, Batch Header Class, Document Class, Transaction Class, Miscellaneous Class, and Measures Class.
- Result Objects:** A panel on the right with a table icon and a 'Run query' button. It contains the instruction: 'To include data in the report, select objects in the Data tab and drag them here. Click Run Query to return the data to the report.'
- Query Filters:** A panel below 'Result Objects' with a funnel icon and a 'Refresh' button. It contains the instruction: 'To filter the query, drag predefined filters here or drag objects here then use the Filter Editor to define custom filters.'
- Data Preview:** A panel at the bottom with a 'Refresh' button and a search bar containing the text 'Type a text to filter the values'.

At the bottom of the window, the status bar shows 'Query 1' and 'Last refresh date: (this document has never been refreshed.)'.

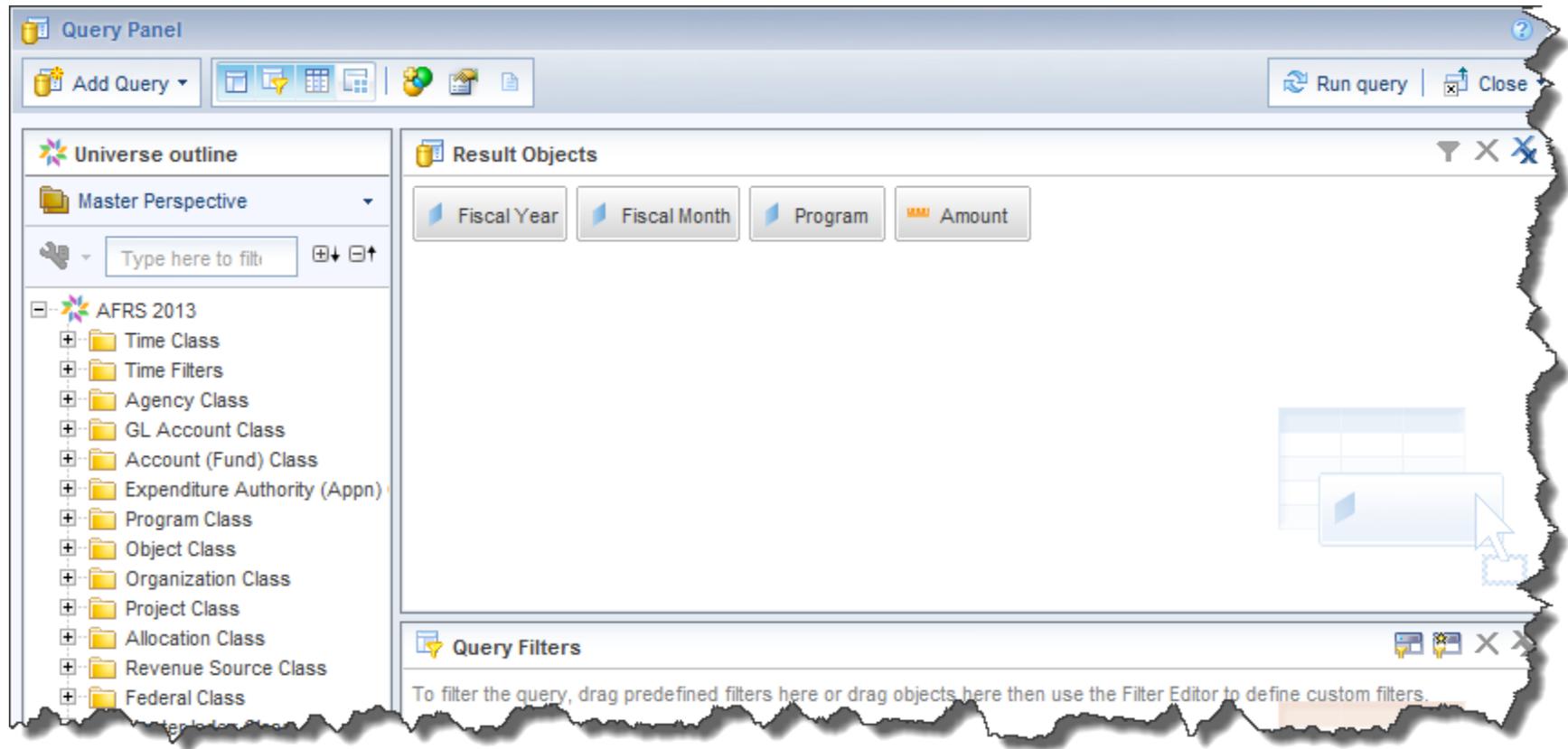
Creating New Web Intelligence Document

Select the objects you want to include in the query and drag them to the **Result Objects** pane. To add all the objects in the class, drag the class to the **Result Objects** pane.



Creating New Web Intelligence Document

Repeat the previous step until the query contains all the objects you want to include.



Creating New Web Intelligence Document

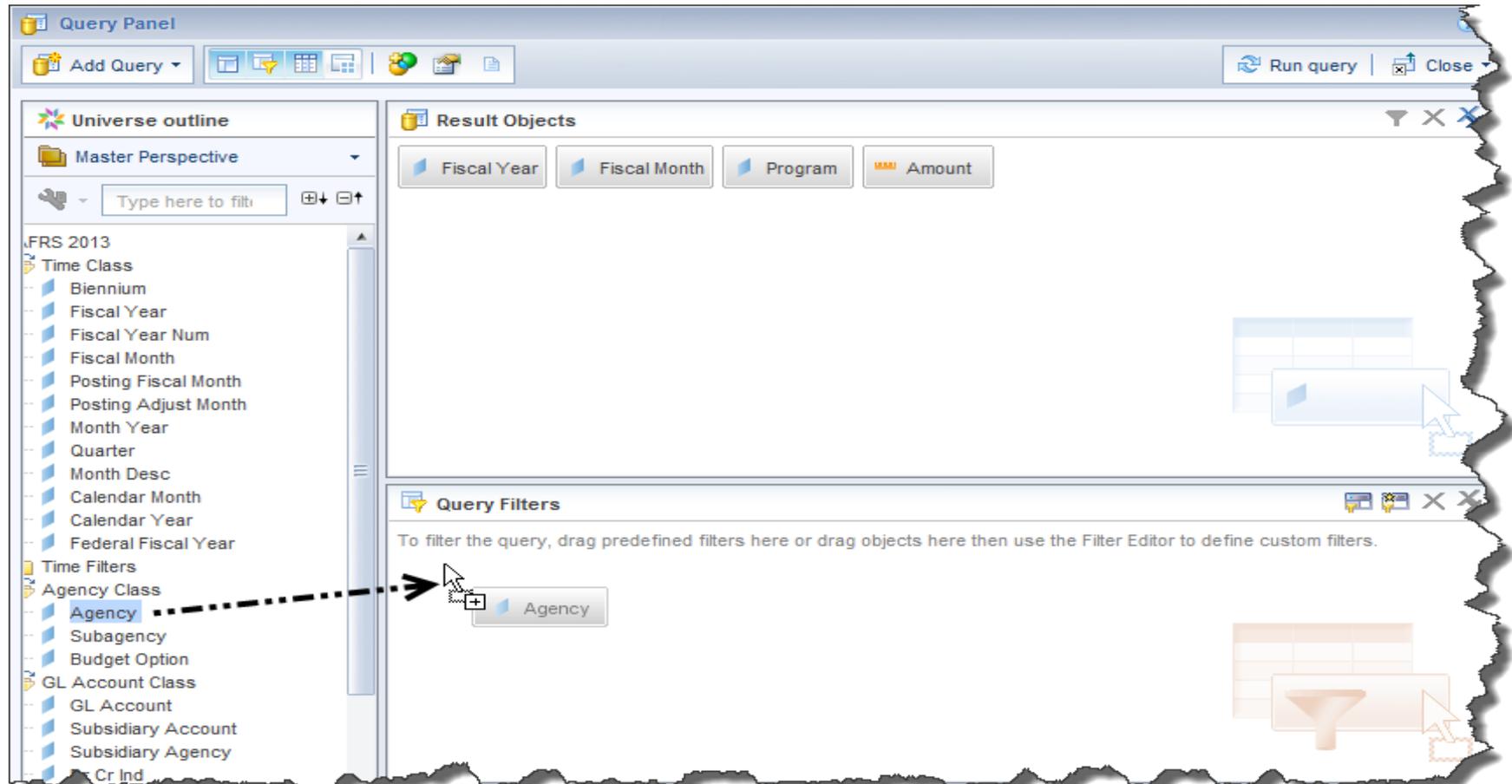
To remove an object from the **Result Objects** or **Query Filters** panes, click **Remove** at the top right corner of the pane.

To remove all objects from the **Result Objects** or **Query Filters** panes, click **Remove All** at the top right corner of the pane.

The screenshot displays the 'Query Panel' interface. On the left is the 'Universe outline' showing a tree structure under 'Master Perspective' and 'AFRS 2013'. The 'Result Objects' pane on the right contains buttons for 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. The 'Query Filters' pane below it shows filters for 'Agency' (Equal to 179), 'GL Account' (Equal to 6510), and 'Fiscal Month' (Equal to 12). The 'Data Preview' pane at the bottom is currently empty. Red circles highlight the 'Remove' (X) and 'Remove All' (X with arrows) icons in the top right corners of the 'Result Objects' and 'Query Filters' panes.

Creating New Web Intelligence Document

Select the objects on which you want to define query filters and drag them to the **Query Filters Pane**.



Creating New Web Intelligence Document

After a data element is selected, a filter editor box will display as illustrated below. The default operator is **In list**. Click on the arrow by **In list** to view the complete list of operators. Choose **Equal to** from the list of operators. Type the value in the text box on the filter editor box.

The screenshot displays the SAP Business Intelligence Query Panel interface. On the left, the 'Universe outline' shows a tree structure under 'Master Perspective' for 'FRS 2013', with 'Agency' selected under 'Agency Class'. The 'Result Objects' pane shows 'Fiscal Year', 'Fiscal Month', 'Program', and 'Amount'. The 'Query Filters' pane shows 'Agency' with a dropdown menu open, listing operators: 'In list', 'Not in list', 'Equal to', 'Not Equal to', 'Greater than', 'Greater than or Equal to', 'Less than', and 'Less than or Equal to'. The 'Equal to' operator is highlighted. A 'Data Preview' pane is visible at the bottom.

Creating New Web Intelligence Document

Repeat the previous step until the query contains all the filters you want to include.

The screenshot displays the SAP Business Intelligence Query Panel interface. The top bar includes an 'Add Query' dropdown, a toolbar with icons for query management, and a 'Run query' button. The main area is divided into four sections:

- Universe outline:** Shows a tree view under 'Master Perspective' for 'AFRS 2013'. The tree includes folders for Time Class, Time Filters, Agency Class, GL Account Class, Account (Fund) Class, Expenditure Authority (Appn), Program Class, Object Class, Organization Class, Project Class, Allocation Class, Revenue Source Class, Federal Class, Master Index Class, Vendor Class, Payment Class, Batch Header Class, Document Class, Transaction Class, Miscellaneous Class, and Measures Class.
- Result Objects:** Displays a list of selected objects: 'Fiscal Year', 'Fiscal Month', 'Program', and 'Amount'.
- Query Filters:** Shows three filter conditions stacked vertically, separated by 'And':
 - Agency Equal to 179
 - GL Account Equal to 6510
 - Fiscal Month Equal to 12
- Data Preview:** A section at the bottom for viewing the query results.

Creating New Web Intelligence Document

Click **Run Query** to run the query.

The screenshot displays the 'Query Panel' window. The title bar includes 'Query Panel' and standard window controls. The main toolbar contains 'Add Query' and several icons. The 'Run query' button is highlighted with a red circle. The 'Universe outline' on the left shows a tree structure under 'Master Perspective' and 'AFRS 2013'. The 'Result Objects' section shows buttons for 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. The 'Query Filters' section shows three filters: 'Agency Equal to 179', 'GL Account Equal to 6510', and 'Fiscal Month Equal to 12'. The 'Data Preview' section is at the bottom with a 'Refresh' button.

Navigating the Report Panel

After a query is run, the results will be displayed in the Report View window.

The screenshot shows the Report Panel interface with several callouts highlighting key navigation and interaction features:

- Undo:** Callout pointing to the Undo icon in the top-left toolbar.
- Refresh:** Callout pointing to the Refresh icon in the top-left toolbar.
- Display Data Elements:** Callout pointing to the 'Display Data Elements' button in the top toolbar.
- Page Navigation:** Callout pointing to the page navigation controls at the bottom of the report.
- Zoom:** Callout pointing to the zoom controls at the bottom of the report.

The main report area displays a table titled "Report 1" with the following data:

Year	Item	Program	Value	Code
2013		010	292.39	
2013		020	7,797.62	
2013	179	6505	716,030.27	030
2013	179	6505	-514,631.35	040
2013	179	6505	1,579,070.88	050
2013	179	6505	-1,028,826.5	060
2013	179	6505	33,118.87	070
2013	179	6505	239,935.65	080

Save a Web Intelligence Document

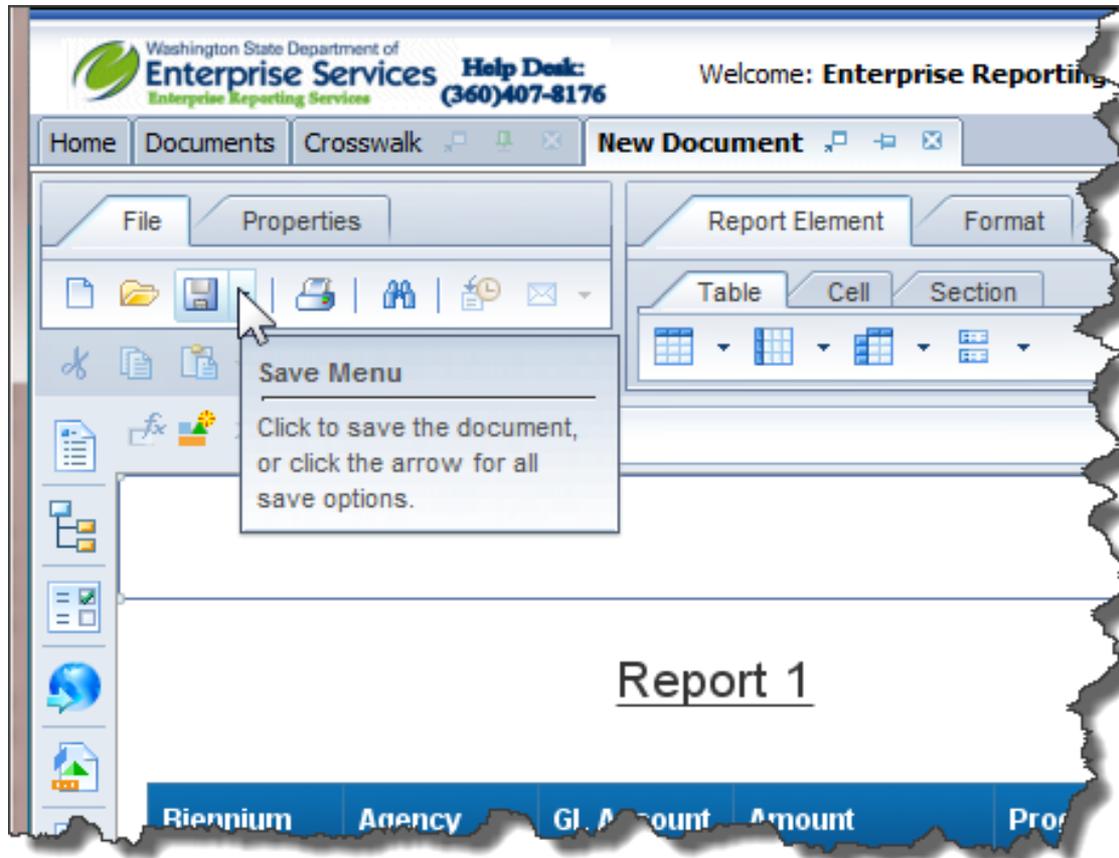
After the query is run, the results will be displayed in the **Report View** window.

Depending on your security profile, you can save a document to either a personal or a public folder within the tool.

- If you are a regular user, you can save a file to a folder under **My Folders**.
- If you are a power user, you can save to either a folder in **My Folders** or to certain **Public Folders**.

Save a Web Intelligence Document

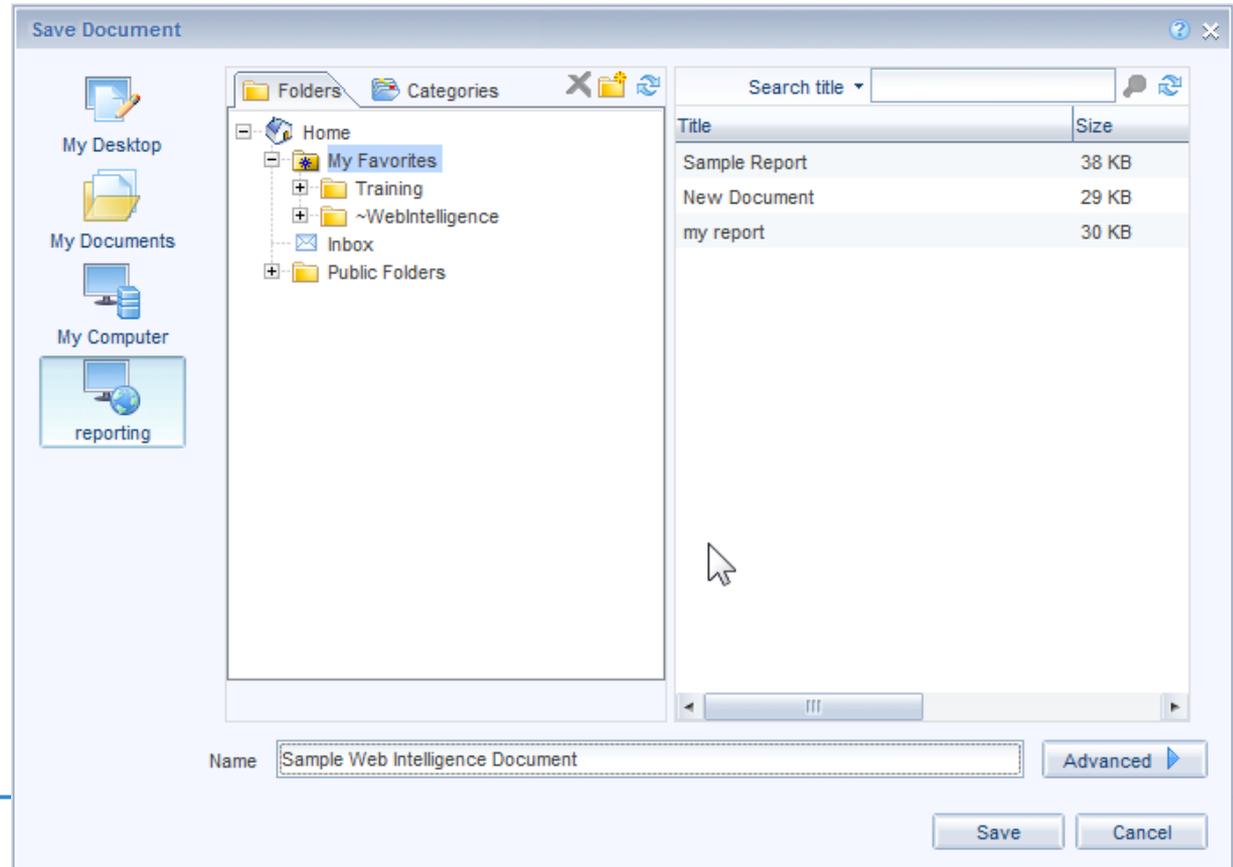
1. To save a Web Intelligence Document click the **Save** button on the upper left corner.



Save a Web Intelligence Document

2. The following Save Document dialog box will appear.
3. Enter the **Title** for the Document and click **Save** on the bottom. Document title can only contain numbers and letters; it cannot contain special characters.

***Note:** The **My Favorites** folder is highlighted so that is the default location where the document or query will be saved. You can choose another folder to which you have access, if you wish.*



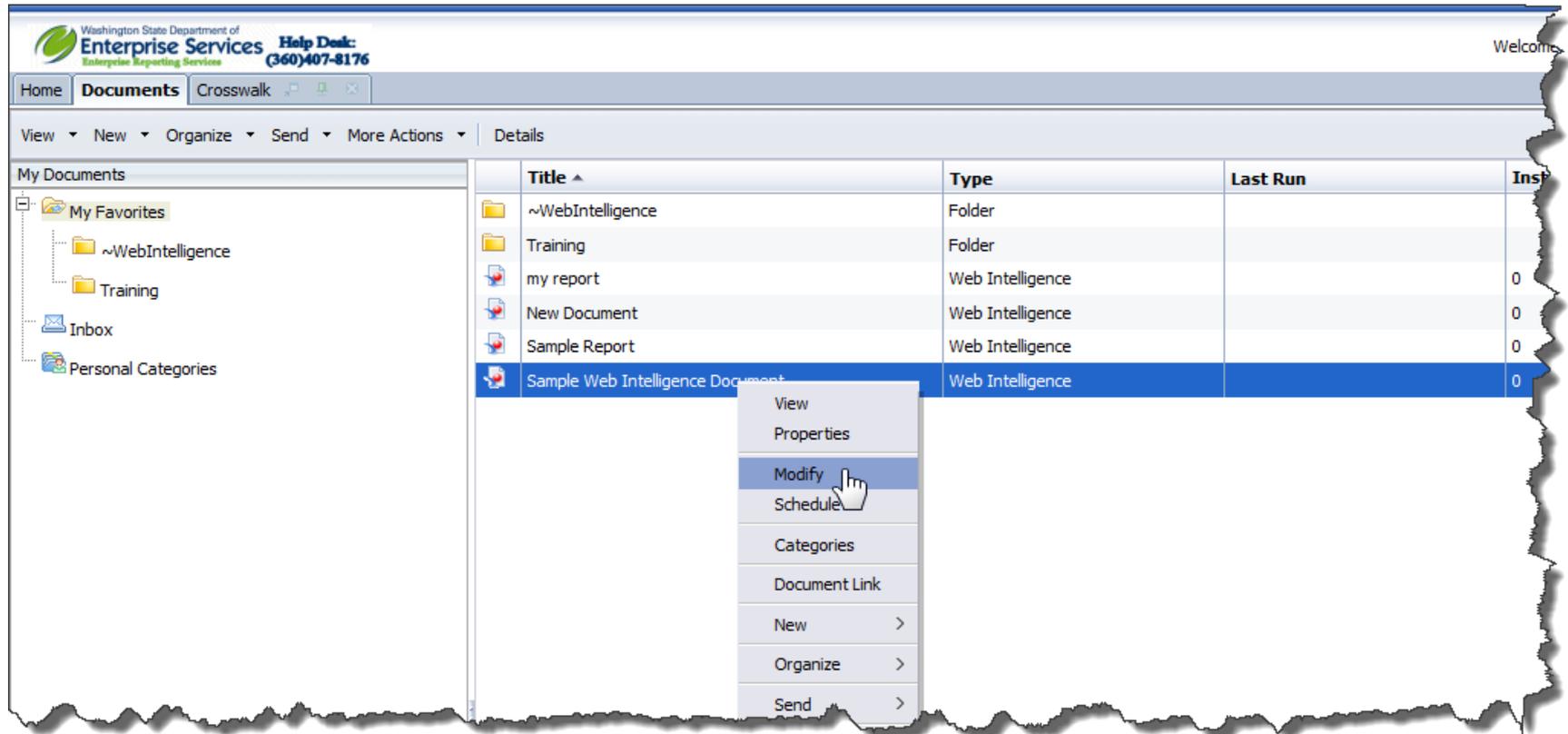
Chapter 5

Query Filter Options



Modify a Document

1. Locate your query in your **My Favorites** folder
2. Right click
3. Select **Modify**



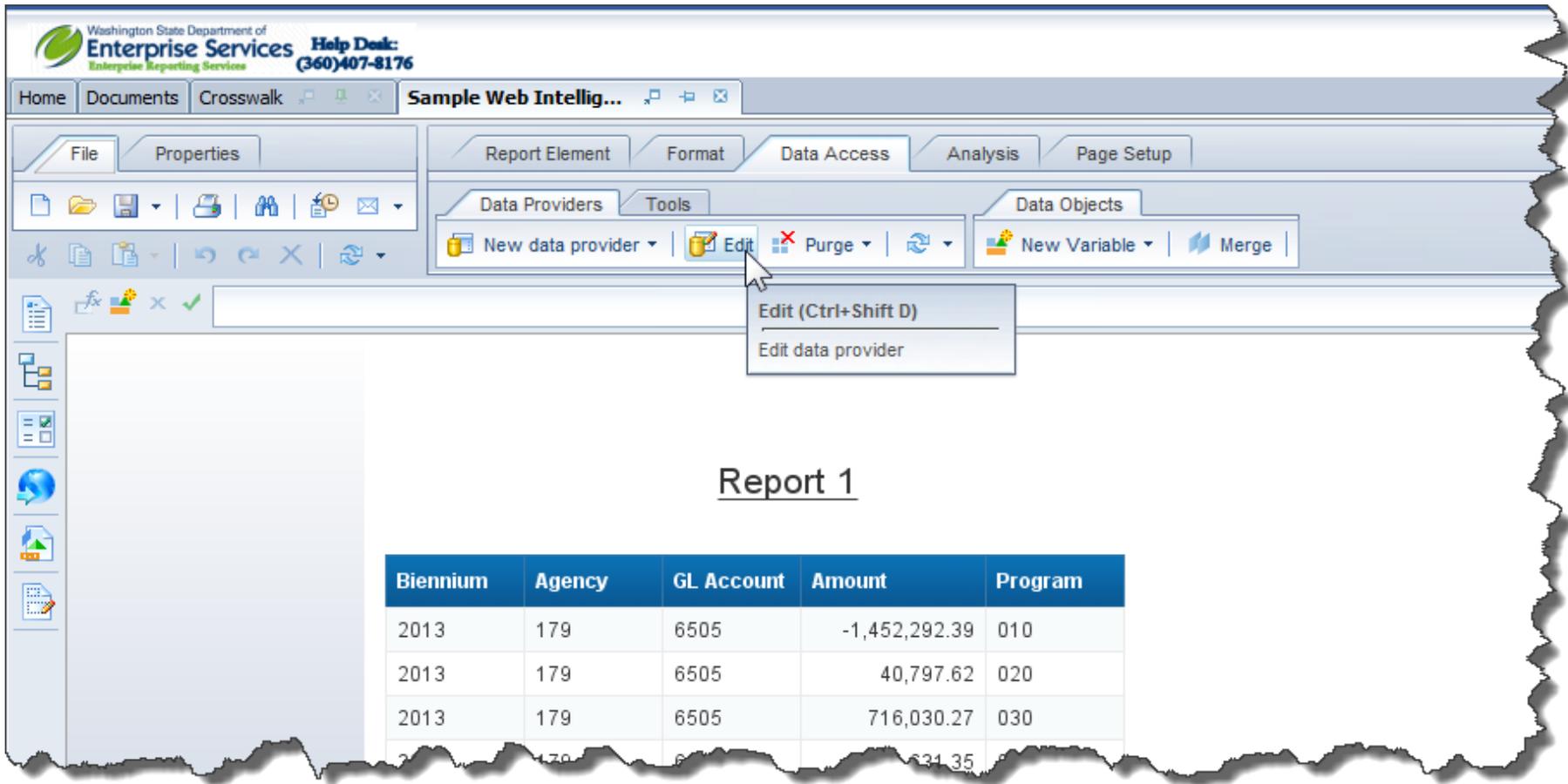
The screenshot shows the Washington State Department of Enterprise Services interface. The top navigation bar includes 'Home', 'Documents', and 'Crosswalk'. Below the navigation bar, there are menu options: 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main content area is divided into two panes. The left pane, titled 'My Documents', shows a tree view with 'My Favorites' expanded, containing sub-folders for '~WebIntelligence', 'Training', 'Inbox', and 'Personal Categories'. The right pane displays a table of documents with columns for 'Title', 'Type', 'Last Run', and 'Inst'. The table contains the following data:

Title	Type	Last Run	Inst
~WebIntelligence	Folder		
Training	Folder		
my report	Web Intelligence		0
New Document	Web Intelligence		0
Sample Report	Web Intelligence		0
Sample Web Intelligence Document	Web Intelligence		0

A context menu is open over the 'Sample Web Intelligence Document' row, with the 'Modify' option highlighted by a mouse cursor. The context menu options are: View, Properties, Modify, Schedule, Categories, Document Link, New, Organize, and Send.

Modify a Document

4. Select the **Data Access** tab and click the **Edit** icon located on the **Data Providers** sub tab.



The screenshot shows the Washington State Department of Enterprise Services software interface. The top navigation bar includes 'Home', 'Documents', 'Crosswalk', and 'Sample Web Intellig...'. The main interface has several tabs: 'File', 'Properties', 'Report Element', 'Format', 'Data Access', 'Analysis', and 'Page Setup'. The 'Data Access' tab is selected, and the 'Data Providers' sub-tab is active. The 'Tools' section contains 'New data provider', 'Edit', and 'Purge'. The 'Data Objects' section contains 'New Variable' and 'Merge'. A tooltip for the 'Edit' icon shows the text 'Edit (Ctrl+Shift D)' and 'Edit data provider'. The main content area displays 'Report 1' and a table with the following data:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	-1,452,292.39	010
2013	179	6505	40,797.62	020
2013	179	6505	716,030.27	030
2013	179	6505	331.35	

To set a filter using a range of values use the **Between** operator. Since you have placed **Fiscal Month** in the Result Objects you can drag it down to the Query Filter Box. Change the operator to **Between** from the drop down list of operators.

The screenshot displays the 'Query Panel' interface. On the left, the 'Universe outline' shows a tree structure under 'AFRS 2013' with 'Fiscal Month' selected. The 'Result Objects' pane contains 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. The 'Query Filters' pane shows three filters: 'Agency' set to 'Equal to' with value '179', 'GL Account' set to 'In list' with value '6510;6410;6505;65', and 'Fiscal Month' set to 'In list'. A dropdown menu for the 'Fiscal Month' filter is open, showing various operators, with 'Between' highlighted. The 'Data Preview' pane is empty. The interface includes a 'Run query' button and a 'Refresh' button.

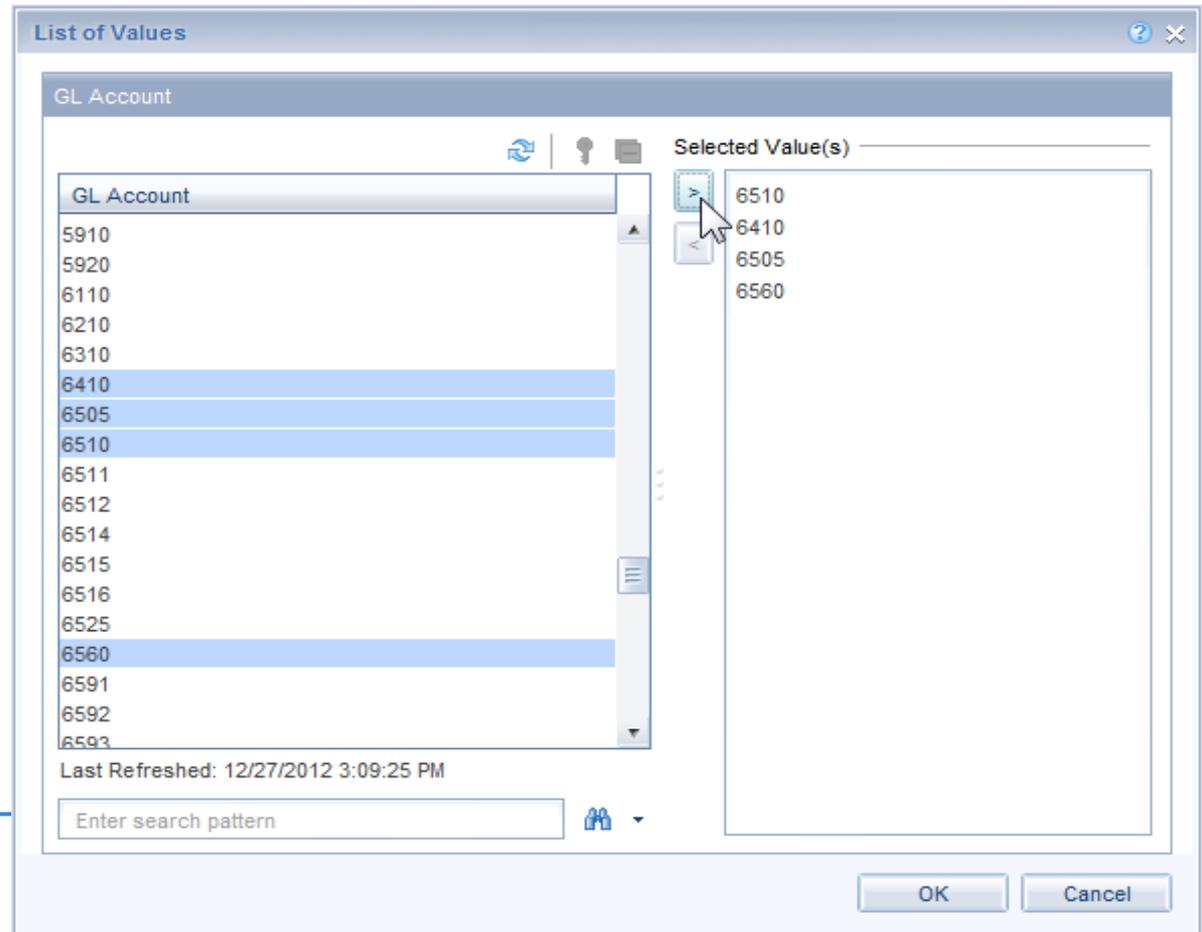
The filter editor box now displays two fields for entering values. Enter a value in each box. The 'Between' operator is inclusive and will include the values entered.

The screenshot displays the 'Query Panel' interface. On the left is the 'Universe outline' showing a tree structure for 'AFRS 2013' with 'Fiscal Month' selected. The main area is divided into three sections: 'Result Objects' (listing Biennium, Agency, GL Account, Amount, Program), 'Query Filters' (containing three filter rules: 'Agency Equal to 179', 'GL Account In list 6510;6410;6505;65', and 'Fiscal Month Between 01 And 12'), and a 'Query Editor' area with a grid and a 'Run query' button.

To set a filter using a list of values use the default operator **In list**. Click on the arrow on the end of the filter editor box. Select **Values from List**.

The screenshot displays the 'Query Panel' interface. On the left is the 'Universe outline' showing a tree structure under 'AFRS 2013' with various class categories like 'Time Class', 'Agency Class', and 'GL Account Class'. The main area is divided into three sections: 'Result Objects' (containing buttons for Biennium, Agency, GL Account, Amount, and Program), 'Query Filters' (containing two filter rows: 'Agency Equal to 179' and 'GL Account In list 6510'), and 'Data Preview' (currently empty). A dropdown menu is open for the 'GL Account' filter, showing options: 'Constant', 'Value(s) from list' (highlighted), 'Prompt', 'Object from this query', and 'Result from another query'. The 'Run query' and 'Close' buttons are visible in the top right corner.

Select the values from the list. Multiple items can be selected by holding the 'CTRL' or 'Shift' keys and selecting your values. Once the values are selected, use the top arrow to move the values into the 'Selected Value(s)' box. Then click OK.



When free forming a list of values each value should be separated with a semicolon and no spaces. Example: 6510;6410;6505;6560

The screenshot displays the 'Query Panel' interface with the following components:

- Universe outline:** A tree view showing the 'AFRS 2013' universe with various class categories like Time Class, Agency Class, and GL Account Class.
- Result Objects:** A list of selected objects including 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'.
- Query Filters:** A section with two filters:
 - 'Agency' set to 'Equal to' with the value '179'.
 - 'GL Account' set to 'In list' with the value '6510;6410;6505;6560'.
- Data Preview:** A section with a 'Refresh' button and a search bar at the bottom labeled 'Type a text to filter the values'.

At the bottom of the window, the status bar shows 'Query 1' and 'Last refresh date: December 27, 2012 2:54:20 PM GMT-08:00'.

Matches Pattern

To include wildcard characters in a value to further define a filter use **Matches Pattern**. This is very useful when you are trying to find data that begins with, ends with, or contains a specified value. For example, you may create a filter to find all vendors that start with a certain word. Please note that using text in filters is not case sensitive.

Matches Pattern

1. Drag a dimension into the Query Filters area.
2. Change the operator to **Matches pattern** by selecting it from the drop-down list of operator values.

The screenshot displays the 'Query Panel' interface. On the left, the 'Universe outline' shows a tree structure under 'FRS 2013' with 'Fiscal Month' selected. The 'Result Objects' section at the top right contains buttons for 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. The 'Query Filters' section in the center contains three filter rows: 'Agency' with the operator 'Equal to' and value '179'; 'Fiscal Month' with the operator 'Between' and values '01' and '12'; and 'GL Account' with the operator 'in list'. A dropdown menu is open for the 'GL Account' filter, showing a list of operators: 'Between', 'Not Between', 'Is null', 'Is not null', 'Matches pattern' (highlighted by a mouse cursor), 'Different from pattern', 'Both', and 'Excent'. The 'Data Preview' section at the bottom is currently empty.

Matches Pattern

3. Type your value into the Value entry field followed by a '%'. This will select values that begin with the value entered followed by any other characters.

The screenshot displays a software interface titled "Query Panel". On the left, a "Universe outline" shows a tree structure under "Master Perspective" with "FRS 2013" expanded to show various time and fiscal filters. The "Fiscal Month" filter is selected. The main area is divided into "Result Objects" and "Query Filters". The "Result Objects" section shows buttons for "Biennium", "Agency", "GL Account", "Amount", and "Program". The "Query Filters" section contains three filter rules: "Agency Equal to 179", "Fiscal Month Between 01 And 12", and "GL Account Matches pattern 65%". A mouse cursor is positioned over the "65%" value in the third filter rule.

<u>Operator</u>	<u>Retrieves Data</u>	<u>Example</u>
Equal To	Equal to the specified value	{Fiscal Month} Equal To 10 retrieves data for fiscal month 10
Not Equal To	Not equal to the specified value	{Fiscal Month} Not Equal To 10 retrieves data for all fiscal months other than 10
Greater Than	Greater than the specified value	{Fiscal Month} Greater Than 10 retrieves data for fiscal months 11 and higher
Greater Than or Equal To	Greater than or equal to the specified value	{Fiscal Month} Greater Than or Equal To 10 retrieves data for fiscal months 10 and higher
Less Than	Lower than the specified value	{Fiscal Month} Less Than 10 retrieves data for fiscal months 01 through 09
Less Than or Equal To	Lower than or equal to the specified value	{Fiscal Month} Less Than or Equal To 10 retrieves data for fiscal months 01 through 10
Between	Between two values; including these values	{GL Account} Between 6500 and 6600 retrieves data for GL Accounts 6500 through 6600
Not Between	Outside the range of two specified values	{GL Account} Between 6500 and 6600 retrieves data for all GL Accounts not between 6500 and 6600

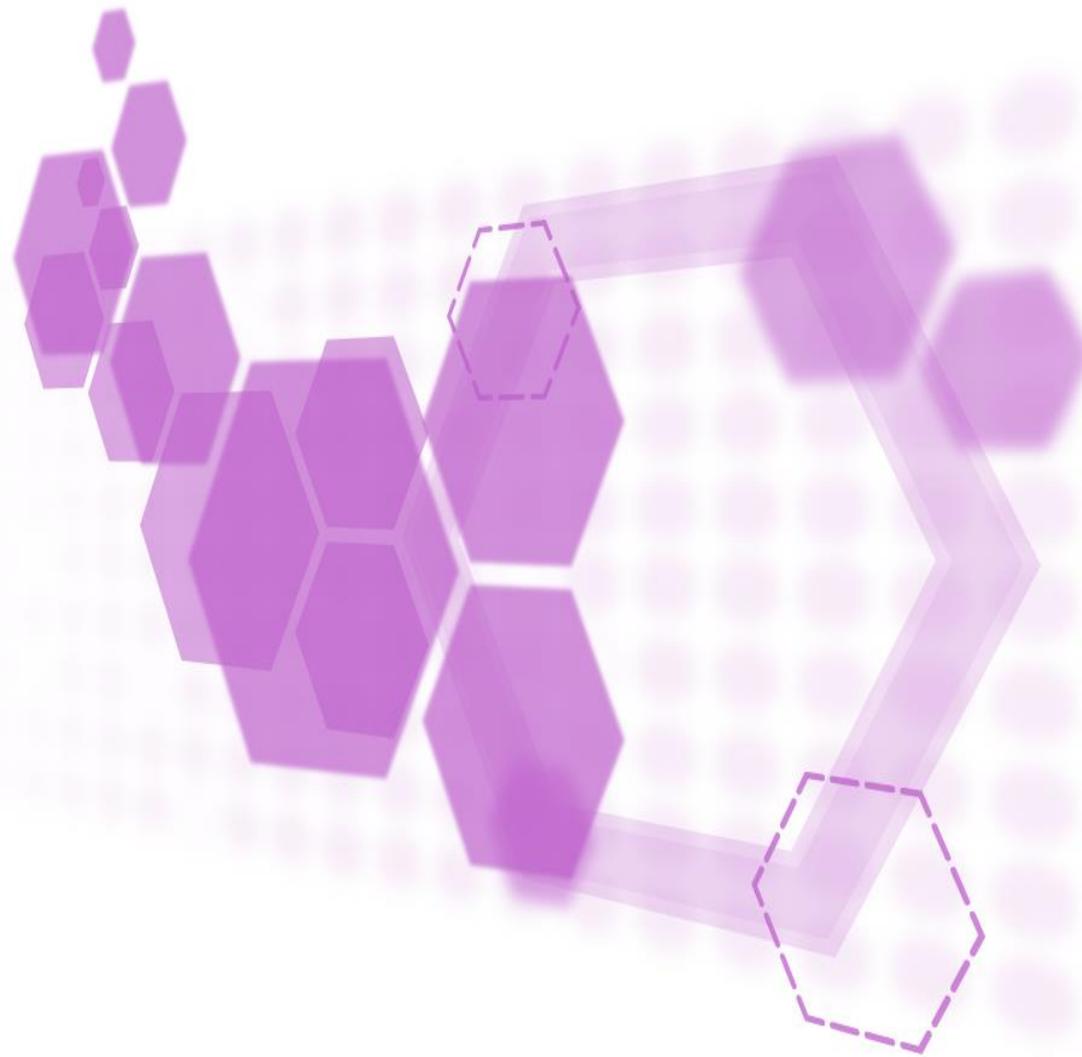
<u>Operator</u>	<u>Retrieves Data</u>	<u>Example</u>
In List	Same as values specified	{Agency} In List '225;310;477' retrieves data only for Agencies 225, 310, and 477
Not In List	Everything other than values specified	{Agency} Not In List '225;310;477' retrieves data for all excluding Agencies 225, 310, and 477
Is Null	Which there is no value entered in the database	Is Null does not apply to the AFRS Universes
Is Not Null	For which there is a value	Is Not Null does not apply to the AFRS Universes
Matches Pattern	Includes a specific string that is like a value	{Program Index} Matches Pattern '15%' retrieves data for any Program Index that begins with 15
Different From Pattern	Excludes a specific string that is like a value	{Program Index} Different From Pattern '15%' retrieves data for any Program Index that does not begin with 15
Both	Corresponds to two specific values	{Budget Option} Both "1" and "2" retrieves data for budget options one and two
Except	Corresponds to one specified value and does not correspond to another specified value	{Budget Option} Except Option "1" retrieves data for budget options other than one

Chapter 6

Working with Web Intelligence Reports



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Add Columns

To add Column – Click and drag the object to the report table where it needs to be added. Overlap it with the edge of the cell next to it. Drop the object in the desired spot.

The screenshot displays the Enterprise Reporting software interface. The main window shows a report titled "Report 1" with a table containing financial data. The table has four columns: "Biennium", "Agency", "Account", and "Amount". A red circle highlights the "Account" column header, which contains the value "6515" and a tooltip that reads "=[Program]". The "Amount" column shows values such as "(\$124,301.12)", "\$221,920,785.00", "\$11,128,840.65", "\$49,198,162.43", and "(\$28,428,537.21)". A "Sum" row at the bottom of the table shows a total of "253,672,608.72". The interface includes a menu bar with options like "File", "Properties", "Report Element", "Format", "Data Access", "Analysis", "Page Setup", "Reading", "Design", and "Data". A toolbar below the menu bar contains various icons for report manipulation. On the left, an "Available Objects" pane shows a tree structure of report elements including "Agency", "Biennium", "GL Account", "Program", "Amount", and "Variables". The status bar at the bottom indicates "Track Changes: Off", "Page 1 of 1", "100%", and "15 minutes ago".

Biennium	Agency	Account	Amount
2013	179	6515	(\$124,301.12)
2013	179	6510	\$221,920,785.00
2013	179	6511	\$11,128,840.65
2013	179	6515	(\$22,341.03)
2013	179	6516	\$49,198,162.43
2013	179	6525	(\$28,428,537.21)
		Sum:	253,672,608.72

Remove Columns

To Remove a column –

1. Click and drag the object into the **Available Objects Window**.

The screenshot displays the Enterprise Reporting software interface. The main window shows a report titled "Report 1" with the following data:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	(\$1,452,292.39)	010
2013	179	6505	\$40,797.62	020
2013	179	6505	\$716,030.27	030
2013	179	6505	(\$514,631.35)	040
2013	179	6505	\$1,579,070.88	050
2013	179	6505	(\$1,028,826.50)	060
2013	179	6505	\$33,118.87	070
2013	179	6505	\$239,935.65	080

The Available Objects window is open on the left, showing a tree structure with "Program" selected. A formula "=NameOf([Program])" is being applied to the report. The interface includes a menu bar with "File", "Properties", "Report Element", "Format", "Data Access", "Analysis", "Page Setup", "Reading", "Design", and "Data". The status bar at the bottom shows "Track Changes: Off", "Page 1 of 1", "100%", and "4 minutes ago".

Remove Columns

2. Select **Remove Column** in the Remove dialogue box and click **OK**.

The screenshot shows the Enterprise Reporting interface. On the left is the 'Available Objects' tree with categories like Agency, Biennium, GL Account, Program, Amount, and Variables. The main area displays 'Report 1' with a data table. A 'Remove' dialog box is open over the table, with 'Remove Column' selected. The table data is as follows:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	(\$1,452,292.39)	010
2013	1		\$40,797.62	020
2013	1		\$716,030.27	030
2013	1		(\$514,631.35)	040
2013	1		1,579,070.88	050
2013	1		208,826.50	060
2013	1		\$33,118.87	070
2013	179	6505	\$239,935.65	080

Add / Remove Columns

When adding and removing columns the data will aggregate based on the columns displayed in the report.

The screenshot displays the Enterprise Reporting software interface. The main window shows a report titled "Report 1" with a table of financial data. The table has five columns: Biennium, Agency, Program, GL Account, and Amount. The data is as follows:

Biennium	Agency	Program	GL Account	Amount
2013	179	010	6505	(\$1,452,292.39)
2013	179	010	6510	\$13,509,734.04
2013	179	020	6505	\$40,797.62
2013	179	020	6510	\$1,617,981.78
2013	179	020	6511	\$20,932.08
2013	179	020	6525	\$188,000.00
2013	179	030	6505	\$716,030.27
2013	179	030	6510	\$39,993,579.93

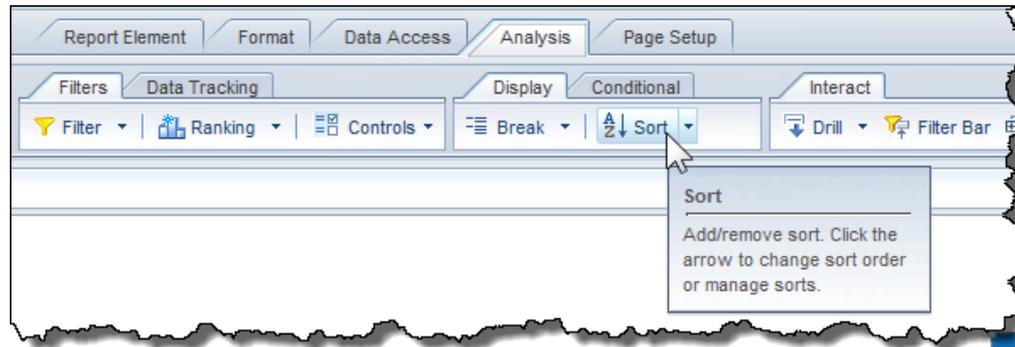
The interface also shows a sidebar with "Available Objects" including Agency, Biennium, GL Account, Program, Amount, and Variables. The status bar at the bottom indicates "Track Changes: Off", "Page 1 of 1", "100%", and "33 minutes ago".

The default sort order for the table data is left to right. The primary sort is the left most column. To set your own sort order follow these steps.

1. Select the data you wish to sort in the table.

Biennium	GL Account	Program	Amount
2013	6505	010	(\$7,539,843.79)
2013	6505	020	(\$221,817.72)
2013	6505	030	\$433,186.37
2013	6505	040	\$170,060.19
2013	6505	050	\$3,947,553.14
2013	6505	060	\$56,506.89
2013	6505	070	(\$100,115.88)
2013	6505	080	\$1,122,175.05
2013	6505	850	\$114,240,717.39
2013	6505	900	\$162,682.99
2013	6510	010	\$9,481,803.19
2013	6510	020	\$1,227,538.86
2013	6510	030	\$39,894,424.87

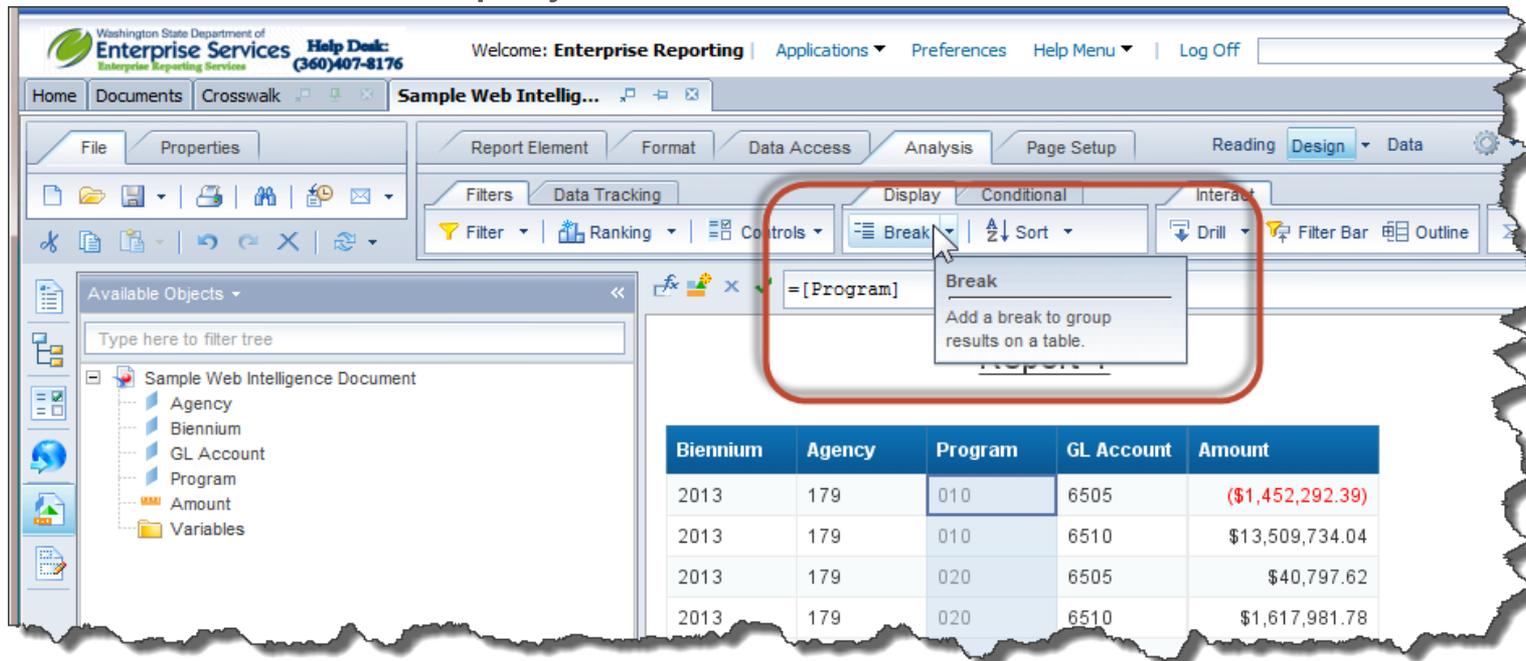
- Under the **Analysis** tab on the **Display** sub-tab click on **Sort**. This will sort the data in your report by the column selected.



Biennium	GL Account	Program	Amount
2013	6591		\$6,391,121.26
2013	650	010	(\$7,539,843.79)
2013	6510	010	\$9,481,803.19
2013	6525	010	\$1,247,986.60
2013	6505	020	(\$221,817.72)
2013	6510	020	\$1,227,538.86
2013	6511	020	\$20,932.08
2013	6525	020	\$215,454.76
2013	6505	030	\$433,186.37
2013	6510	030	\$39,894,424.87
2013	6511	030	\$5,188,492.70
2013	6516	030	\$48,174,688.43

A break divides a large table into smaller sub-tables based on the selected value. Using a break, you can display subtotals by the specified value, as well as a grand total for all values.

To add a break, click in the data to highlight the column. Click on the **Break** button on Display sub tab to add and remove a break.

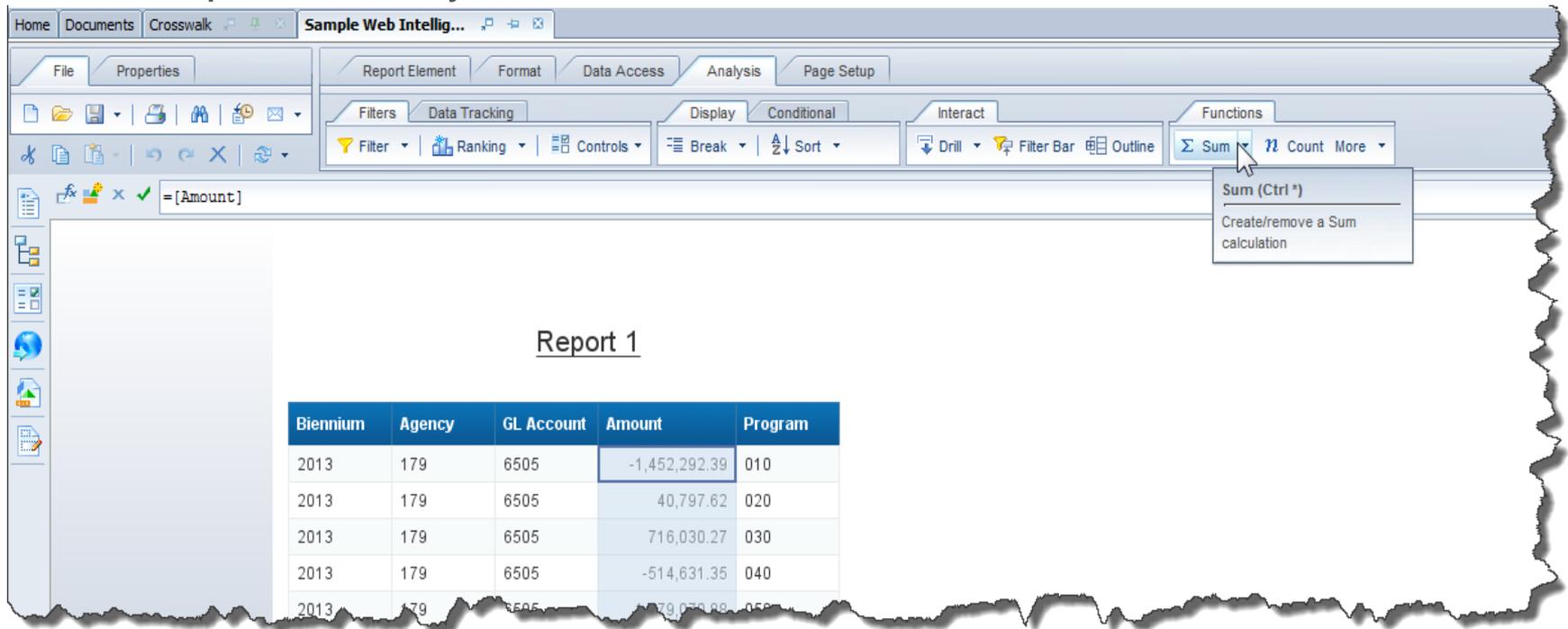


The screenshot shows the Enterprise Reporting software interface. The 'Display' sub-tab is active, and the 'Break' button is highlighted with a red box. A tooltip for the 'Break' button reads: 'Break: Add a break to group results on a table.' The table below shows data grouped by Program, with a break applied to the Program column.

Biennium	Agency	Program	GL Account	Amount
2013	179	010	6505	(\$1,452,292.39)
2013	179	010	6510	\$13,509,734.04
2013	179	020	6505	\$40,797.62
2013	179	020	6510	\$1,617,981.78

Simple Calculations – Sum

1. Highlight the data in the **Amount** column
2. Select the **Analysis** tab and click the **Sum** icon located on the **Functions** sub tab.
3. Each break will display a sum and you can navigate to the end of the report to see your overall total.



The screenshot shows a software interface with a report titled "Report 1". The report contains a table with the following data:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	-1,452,292.39	010
2013	179	6505	40,797.62	020
2013	179	6505	716,030.27	030
2013	179	6505	-514,631.35	040
2013	179	6505	79,073.88	050

The interface includes a ribbon with tabs for "Report Element", "Format", "Data Access", "Analysis", and "Page Setup". The "Analysis" tab is active, and the "Functions" sub-tab is selected. The "Sum" button is highlighted, and a tooltip is visible with the text "Sum (Ctrl +)", "Create/remove a Sum calculation".

Format Numbers

To reformat the numbers in a measure column select the **Format** tab and choose the format from the dropdown list located on the **Numbers** sub tab.

The screenshot displays the 'Enterprise Reporting' application interface. The 'Format' tab is active, and the 'Numbers' sub-tab is selected. A dropdown menu is open, showing a list of number formats. The selected format is '\$1,234.57; (\$1,234.57)'. The background shows a data table with the following columns: Biennium, Agency, GL Account, Amount, and Program.

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	-1,452,292.39	010
2013	179	6505	40,797.62	020
2013	179	6505	716,030.27	030
2013	179	6505	-514,631.35	040
2013	179	6505	1,579,070.88	050
2013	179	6505	-1,028,826.5	060
2013	179	6505	33,118.87	070
2013	179	6505	239,935.65	080
2013	179	6505	34,301.56	850
2013	179	6505	228,194.27	900

Chapter 7

Printing and Exporting Reports

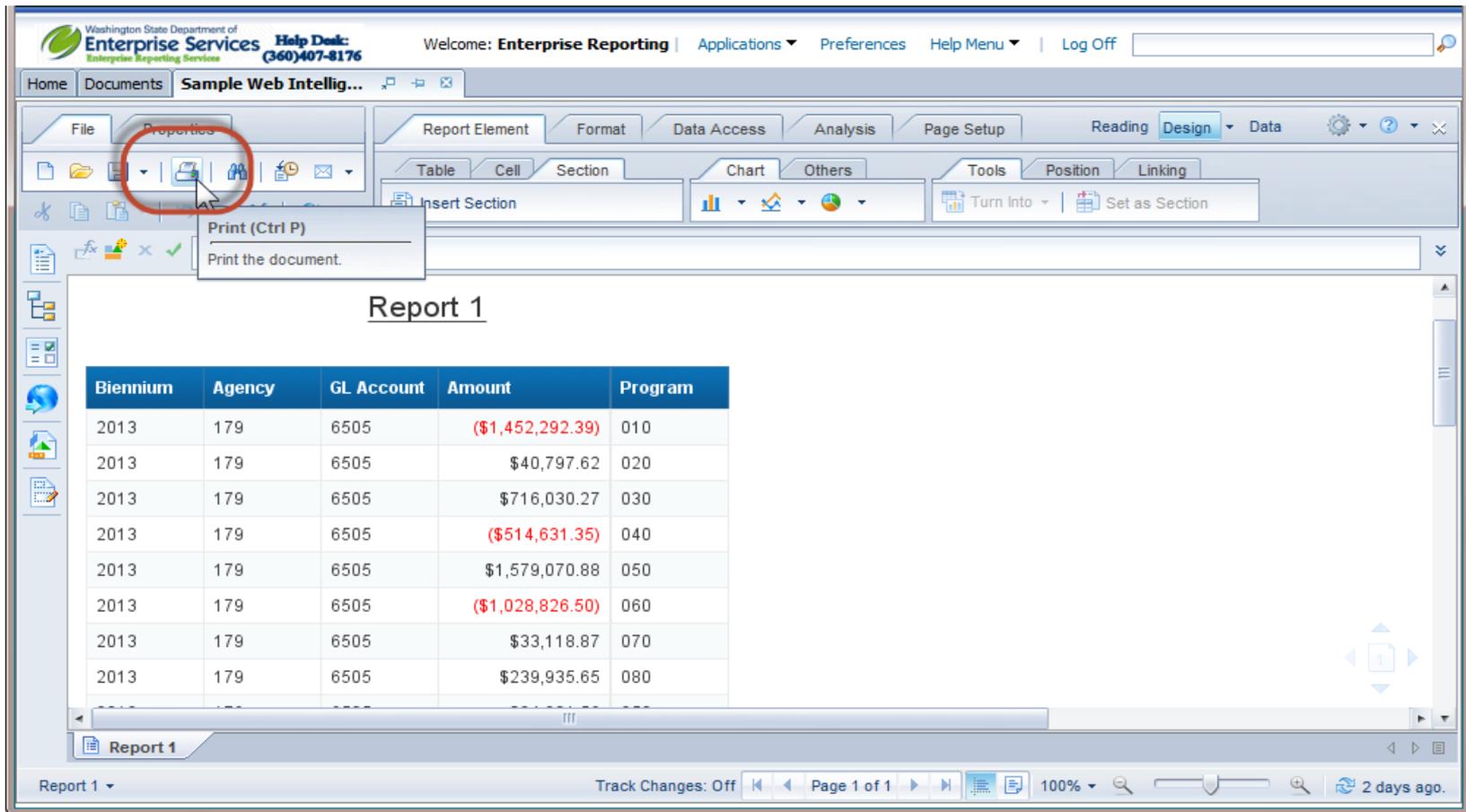


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Printing Reports

Reports can be printed by clicking on the **Print** icon located on the **File** tab.



The screenshot shows the Enterprise Reporting software interface. The top navigation bar includes the Washington State Department of Enterprise Services logo, a Help Desk number (360)407-8176, and a welcome message for Enterprise Reporting. The main menu includes Home, Documents, and Sample Web Intellig... The File tab is active, and the Print icon is highlighted with a red circle. A tooltip for the Print icon is visible, showing the text "Print (Ctrl P)" and "Print the document." Below the File tab, the Report Element, Format, Data Access, Analysis, Page Setup, Reading, Design, and Data tabs are visible. The main content area displays a report titled "Report 1" with a table of financial data. The table has five columns: Biennium, Agency, GL Account, Amount, and Program. The data is as follows:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	(\$1,452,292.39)	010
2013	179	6505	\$40,797.62	020
2013	179	6505	\$716,030.27	030
2013	179	6505	(\$514,631.35)	040
2013	179	6505	\$1,579,070.88	050
2013	179	6505	(\$1,028,826.50)	060
2013	179	6505	\$33,118.87	070
2013	179	6505	\$239,935.65	080

The bottom status bar shows "Report 1", "Track Changes: Off", "Page 1 of 1", "100%", and "2 days ago".

When the **Print** icon clicked the **Print** dialogue box displays. Set the print options and click **OK**.

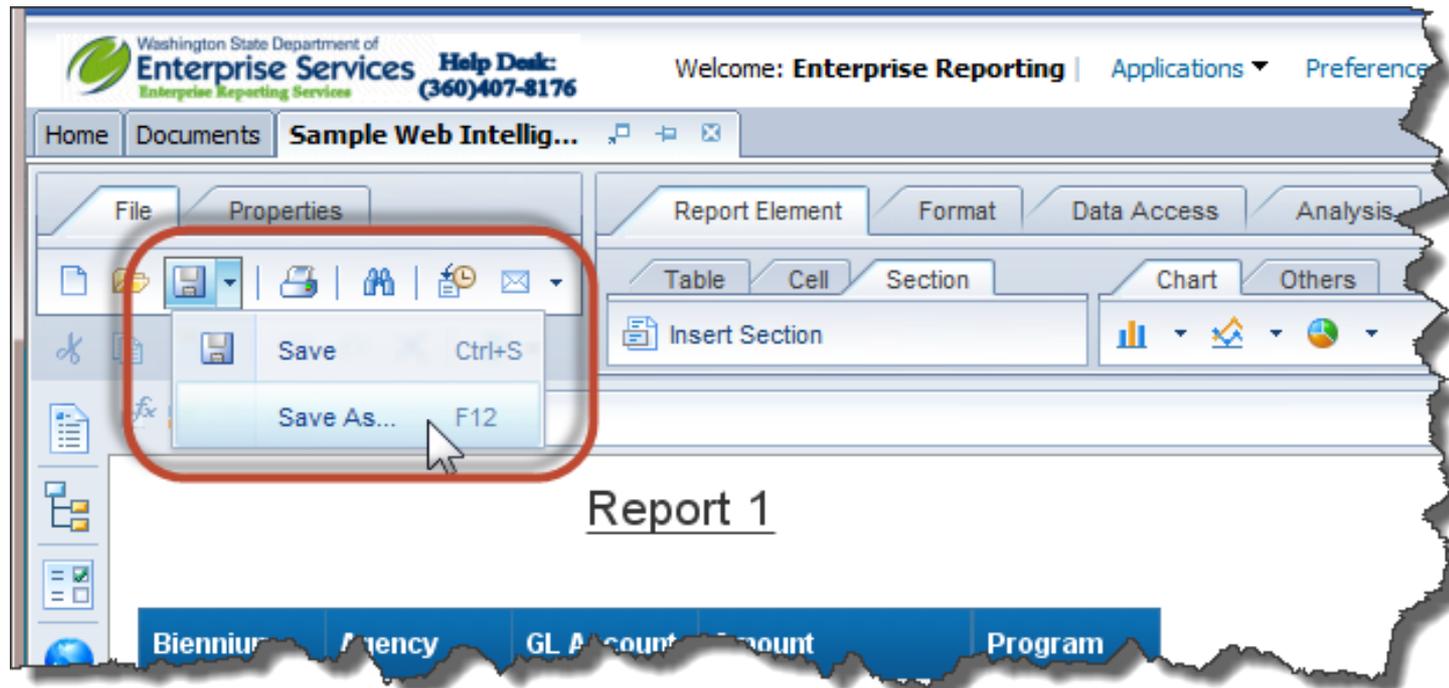
The screenshot shows a 'Print' dialog box with the following sections and options:

- Printer selection:** Printers: \wncmsoly1005\4074_01_C
- Print Range:**
 - All Reports
 - Current Report
 - All
 - Current Page
 - Pages:
 - Enter page range (example: 1,3,5-11).
- Page Size:** A4 (ISO/DIN & JIS)
- Margins:**
 - Top: 0.79"
 - Left: 0.79"
 - Right: 0.79"
 - Bottom: 0.79"
- Scaling:**
 - Adjust To: 100%
 - Fit to: auto page(s) wide auto page(s) tall
- Orientation:**
 - Portrait
 - Landscape
- Copies:** Number of copies: 1

Buttons: OK, Cancel

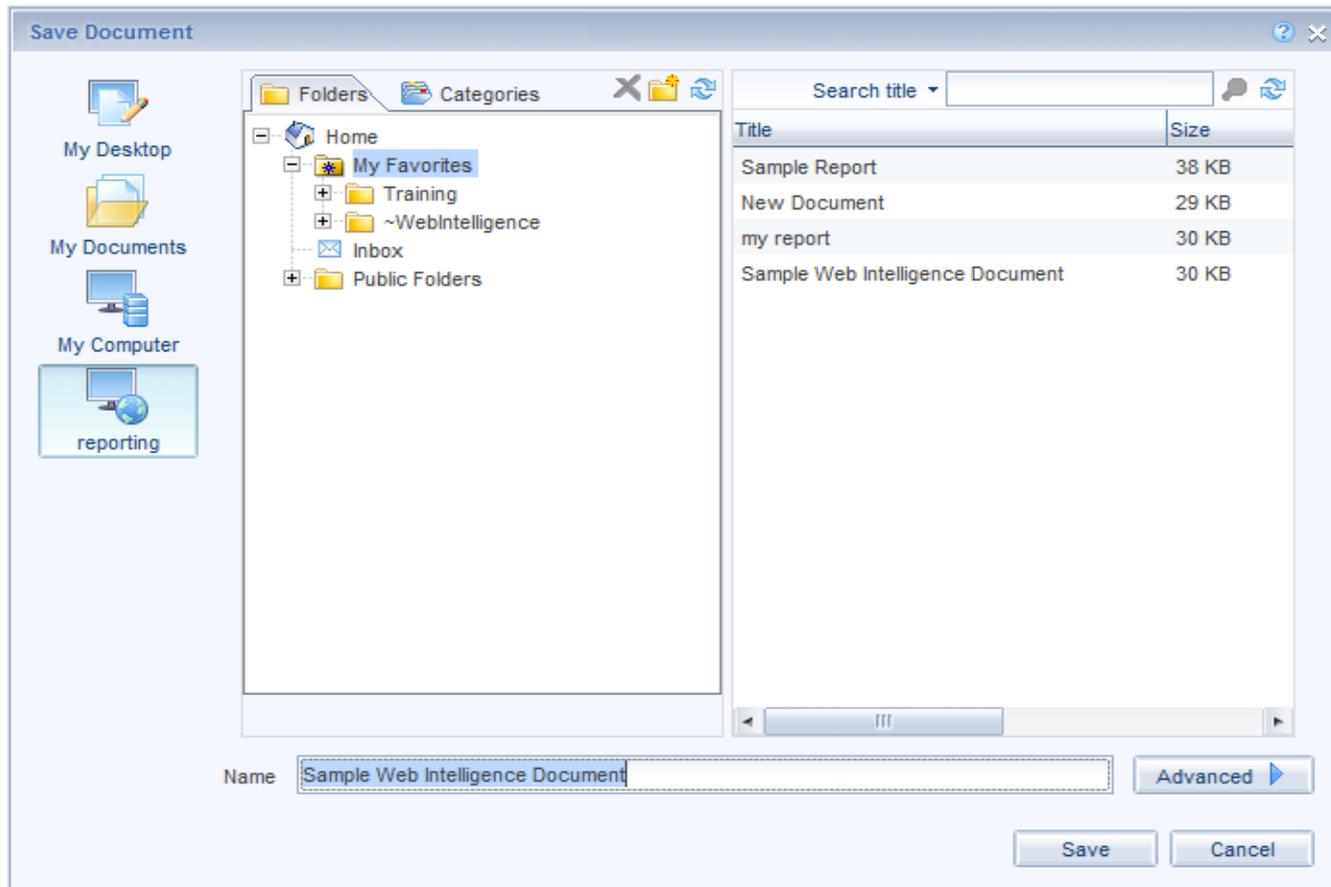
Exporting Reports

1. To export a report click on the dropdown arrow next to the **Save** icon and select **Save as**.



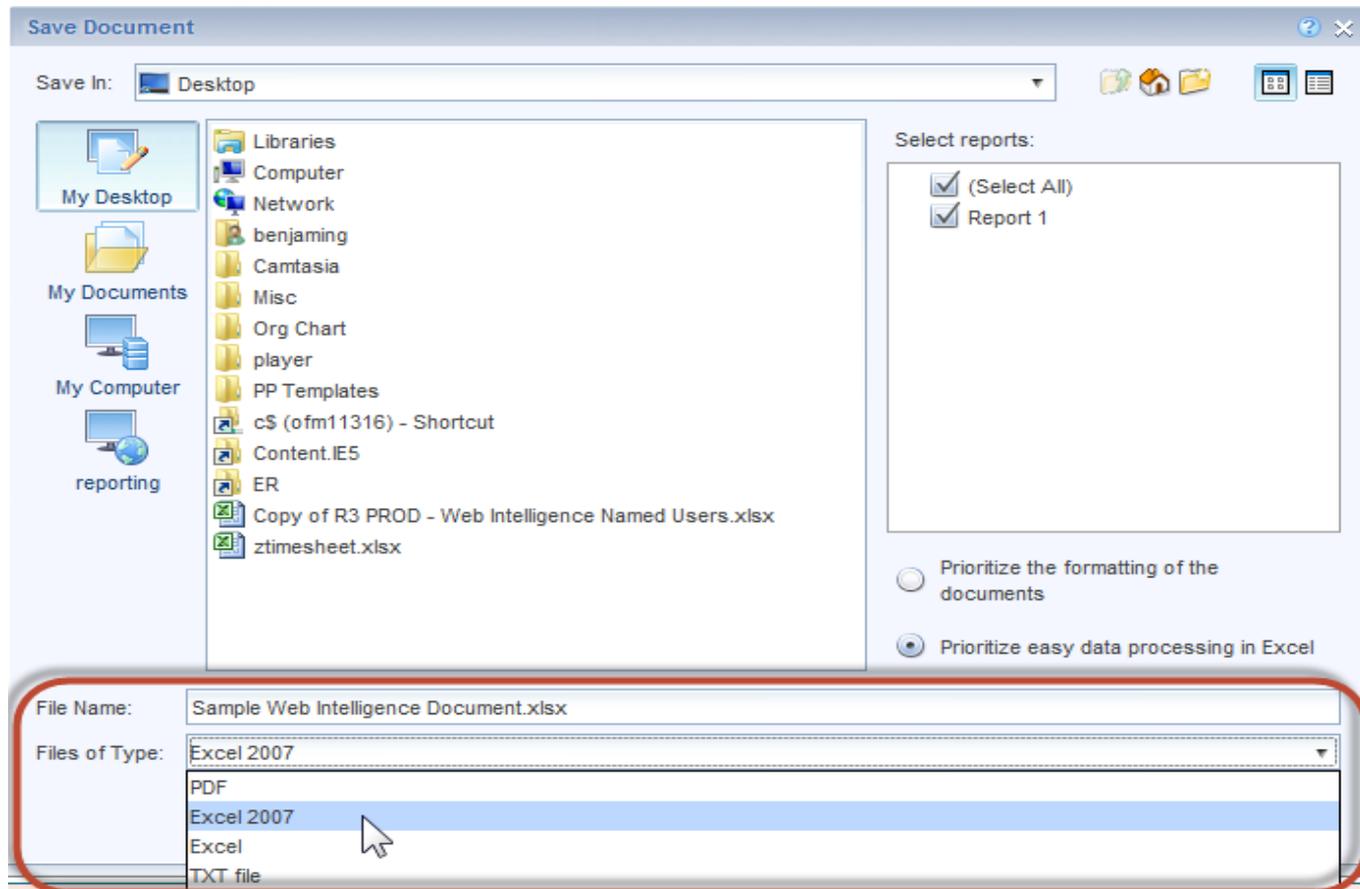
Exporting Reports

2. When **Save as** is clicked the **Save** dialogue box displays. Select **My Desktop**, **My Documents**, or **My Computer** as the location.

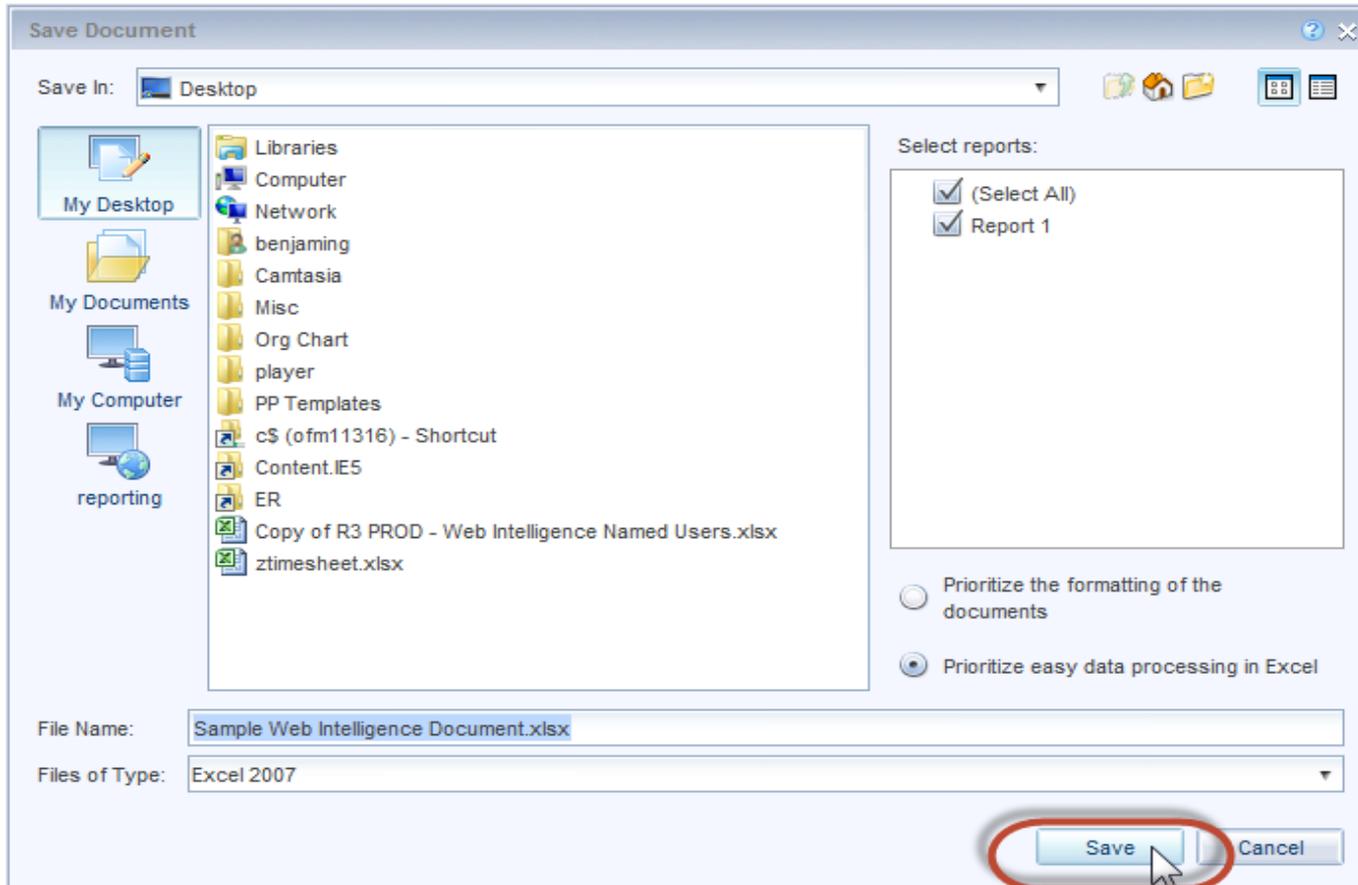


Exporting Reports

3. Verify the file name and update if needed.
4. Select the file type.



5. Click **Save**.



Chapter 8

Viewing and Scheduling Reports



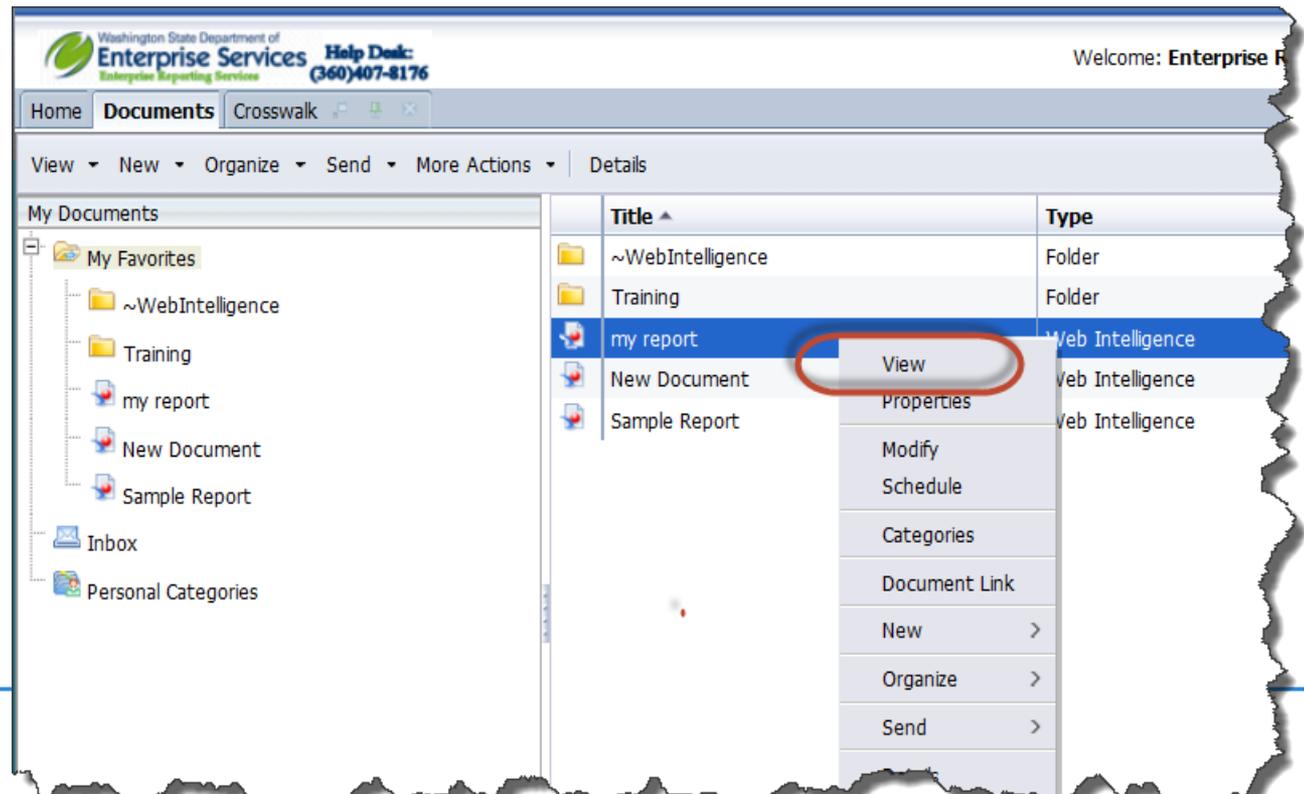
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Viewing Existing Documents

The BI Launch Pad allows for the viewing of existing Web Intelligence Reports. To view an existing Web Intelligence Report:

1. Click on the report in the Recently Viewed or Recently Run lists on the “Home” tab or select the “Documents” tab.
2. Select the folder with the report you need to view. In the example below we are looking in “My Documents” and “My Favorites”.
3. Right Click on the report you wish to view and from the menu select “View”.



The screenshot displays the Enterprise Reporting Services interface. The top navigation bar includes the Washington State Department of Enterprise Services logo, a Help Desk contact number (360)407-8176, and a user welcome message. The main interface is divided into a left sidebar for navigation and a main content area for document management.

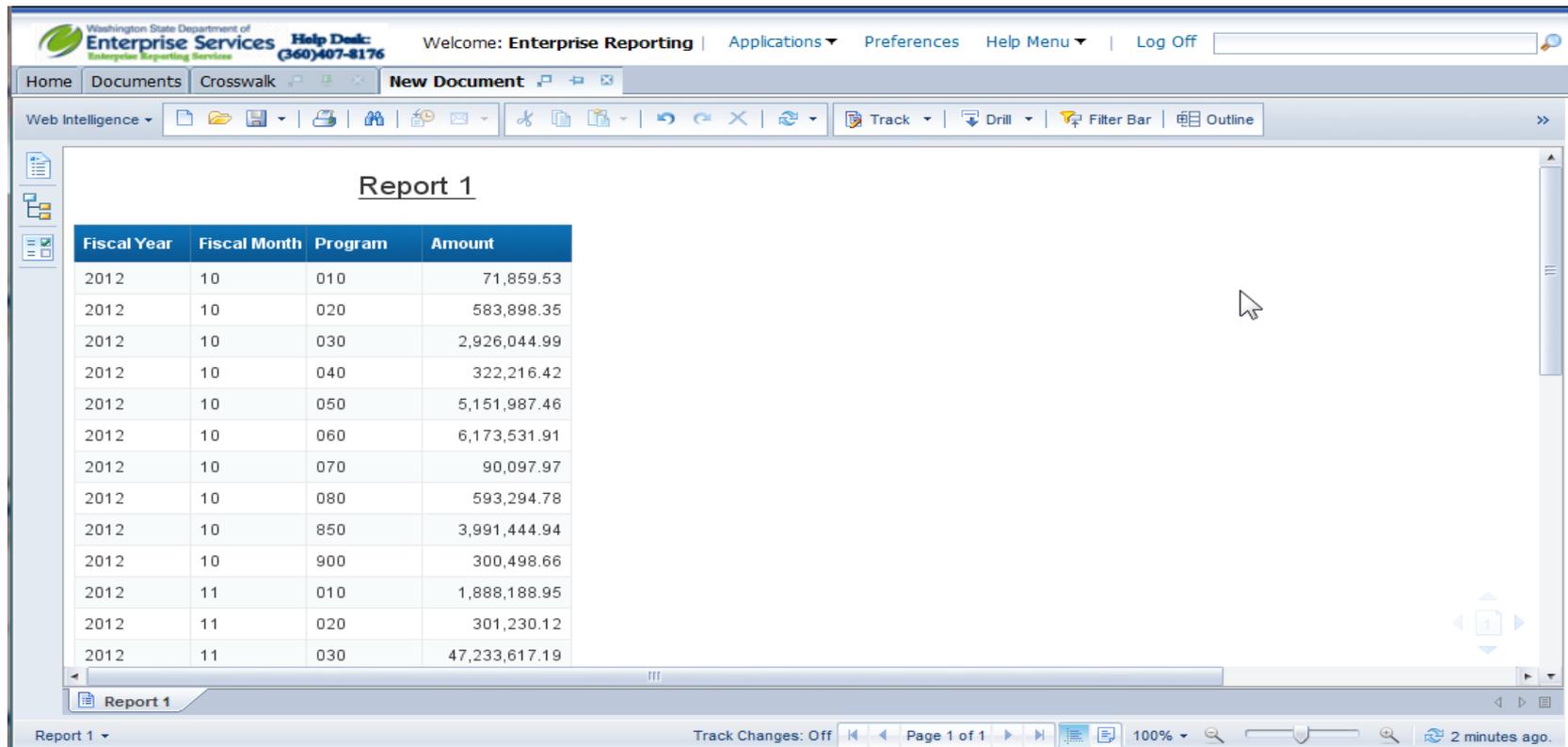
The left sidebar shows a tree view under "My Documents" with folders for "My Favorites", "~WebIntelligence", "Training", "my report", "New Document", "Sample Report", "Inbox", and "Personal Categories".

The main content area features a table with columns "Title" and "Type". The table lists several documents, with "my report" selected. A context menu is open over the "my report" row, with the "View" option highlighted by a red circle.

Title	Type
~WebIntelligence	Folder
Training	Folder
my report	Web Intelligence
New Document	Web Intelligence
Sample Report	Web Intelligence

Viewing Existing Documents

4. The report will open in view mode.
5. To navigate you can scroll up and down or left and right, and advance pages using the page navigation controls located on the bottom of the page.



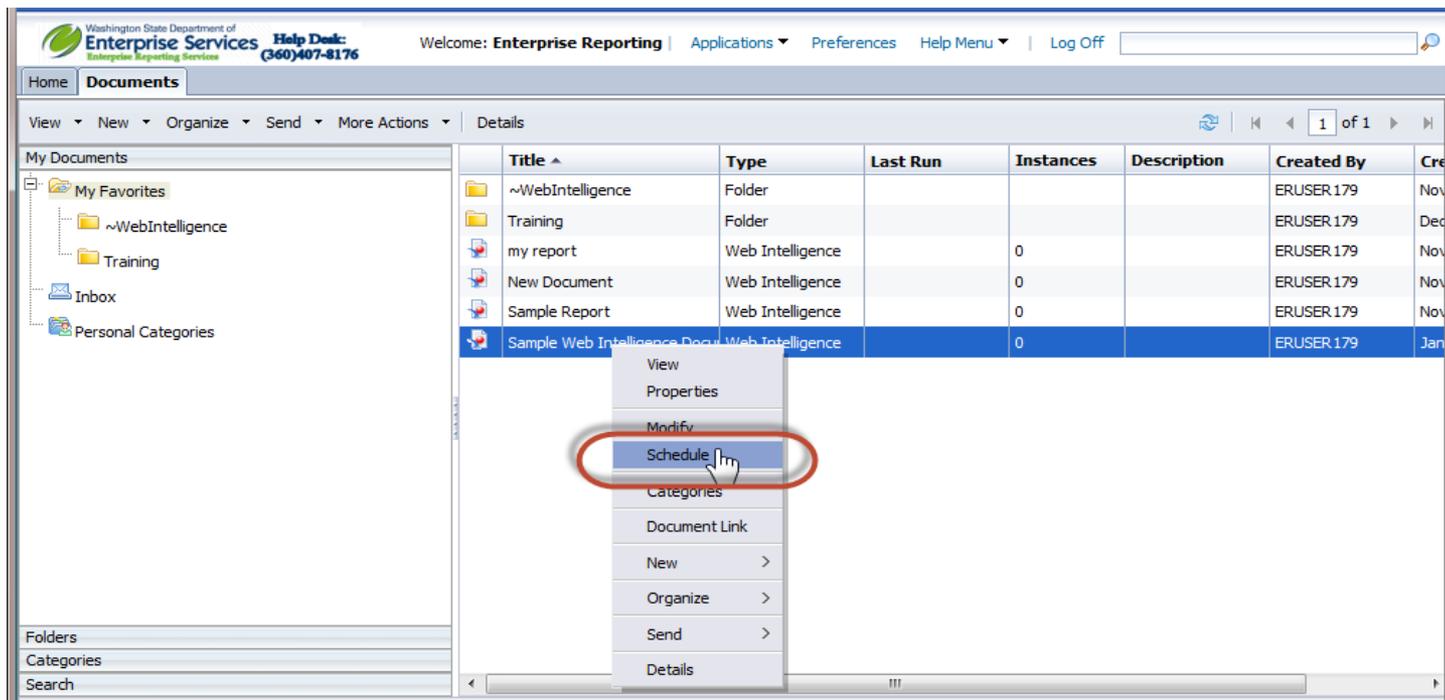
The screenshot displays the Enterprise Reporting web application interface. At the top, the header includes the Washington State Department of Enterprise Reporting Services logo, a help desk number (360)407-8176, and a welcome message for 'Enterprise Reporting'. The navigation bar contains tabs for 'Home', 'Documents', 'Crosswalk', and 'New Document'. Below the navigation bar is a toolbar with various icons for file operations and report controls. The main content area shows a report titled 'Report 1' with a table of data. The table has four columns: 'Fiscal Year', 'Fiscal Month', 'Program', and 'Amount'. The data is organized by fiscal year (2012) and fiscal month (10 and 11). The bottom status bar shows 'Report 1', 'Track Changes: Off', 'Page 1 of 1', a zoom level of 100%, and a refresh icon with the text '2 minutes ago'.

Fiscal Year	Fiscal Month	Program	Amount
2012	10	010	71,859.53
2012	10	020	583,898.35
2012	10	030	2,926,044.99
2012	10	040	322,216.42
2012	10	050	5,151,987.46
2012	10	060	6,173,531.91
2012	10	070	90,097.97
2012	10	080	593,294.78
2012	10	850	3,991,444.94
2012	10	900	300,498.66
2012	11	010	1,888,188.95
2012	11	020	301,230.12
2012	11	030	47,233,617.19

Scheduling Reports

Web Intelligence reports can be scheduled to run on a recurring schedule.

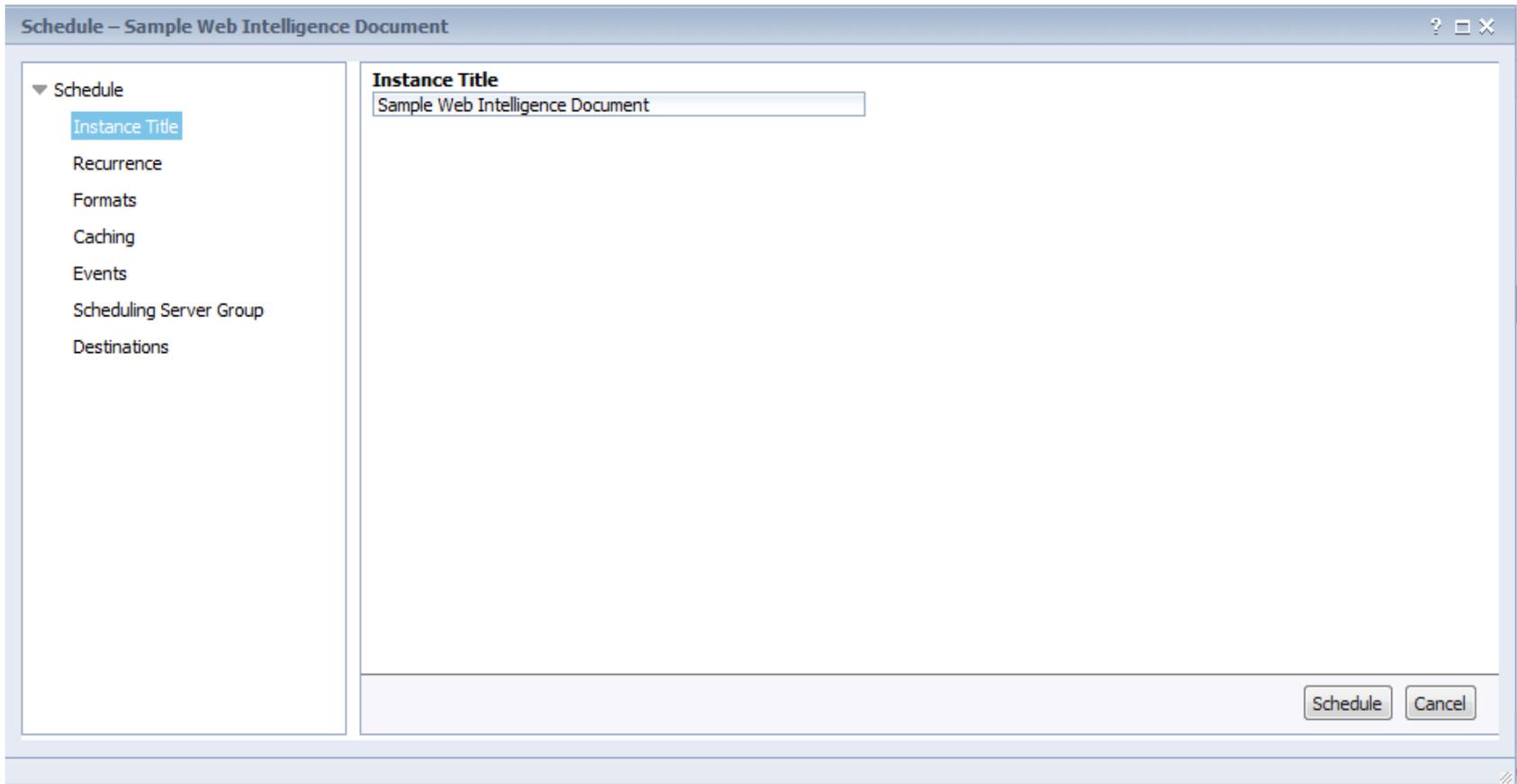
1. On the **Documents** tab, locate and select the object that you want to schedule.
2. Right click
3. Select “Schedule”



The screenshot shows the 'Enterprise Reporting' web application interface. The 'Documents' tab is active, displaying a table of reports. A right-click context menu is open over the 'Sample Web Intelligence Report' row, with the 'Schedule' option highlighted by a red circle. The table columns include Title, Type, Last Run, Instances, Description, Created By, and Created Date.

Title ^	Type	Last Run	Instances	Description	Created By	Cre
~WebIntelligence	Folder				ERUSER179	Nov
Training	Folder				ERUSER179	Dec
my report	Web Intelligence		0		ERUSER179	Nov
New Document	Web Intelligence		0		ERUSER179	Nov
Sample Report	Web Intelligence		0		ERUSER179	Nov
Sample Web Intelligence Report	Web Intelligence		0		ERUSER179	Jan

4. The schedule Dialogue will open.



5. In the **Instance Title** box, type a name for the instance.
6. In the "Schedule" dialog box, click Recurrence
7. Choose one of the recurrence options from the **Run object** list and set the required options. When you click **Schedule**, the default is "immediately."

The following additional options are available:

- **Once**

This option requires a start and end time parameter. The object runs once at the time that you specify. If you schedule the object with events, the object will run once if the event is triggered between the start and end times.

- **Hourly**

This option requires information in hours and/or minutes for how frequently the object is run. Instances are created regularly to match the parameters that you enter. The first instance is created at the start time that you specify, and the object will cease to run on its hourly schedule at the end time that you specify.

- **Daily**

This option requires a start and end time parameter. The object runs once every N days at the time that you specify. It will not be run after the end time that you specify.

Scheduling Reports

- **Weekly**

This option requires a start and end time parameter. Each week, the object runs on the selected days at the time that you specify. It will not be run after the end time that you specify.

- **Monthly**

This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N months. It will not be run after the end time that you specify.

- **Nth Day of Month**

This option requires a day of the month on which the object is run. Instances are created regularly each month on the day that you enter at the start time that you specify. The object will not be run after the end time that you specify.

- **1st Monday of Month**

This option requires a start and end time parameter. An instance is created on the first Monday of each month at the time that you specify. The object will not be run after the end time that you specify.

- **Last Day of Month**

This option requires a start and end time parameter. An instance is created on the last day of each month at the time that you specify. The object will not be run after the end time that you specify.

- **X Day of Nth Week of the Month**

This option requires a start and end time parameter. An instance is created monthly on a day of a week that you specify. The object will not be run after the end time that you specify.

- **Calendar**

This option allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the Bi platform administrator.) An instance is created on each day that is indicated in the calendar, beginning at the start time that you specify and continuing until the end time that you specify.

8. Click **Formats**

9. Select the format you want to schedule to from the Output Format list.

10. Click **Destinations**

- a) Select a destination option
- b) Select the **Keep an instance in the history** check box if you want to save a copy of the instance.
- c) Select the **Use default settings** check box if you want to the report to be sent to the logged in user.

You can schedule to the following destination locations:

- **Default Enterprise Location**

If you select this option, the instance is saved within Business Objects.

- **BI Inbox**

This option saves the instance to BI Inboxes specified.

- **Email**

This option sends the instance to the specified email recipients.

- **FTP Server**

This option saves the instance to the specified FTP server.

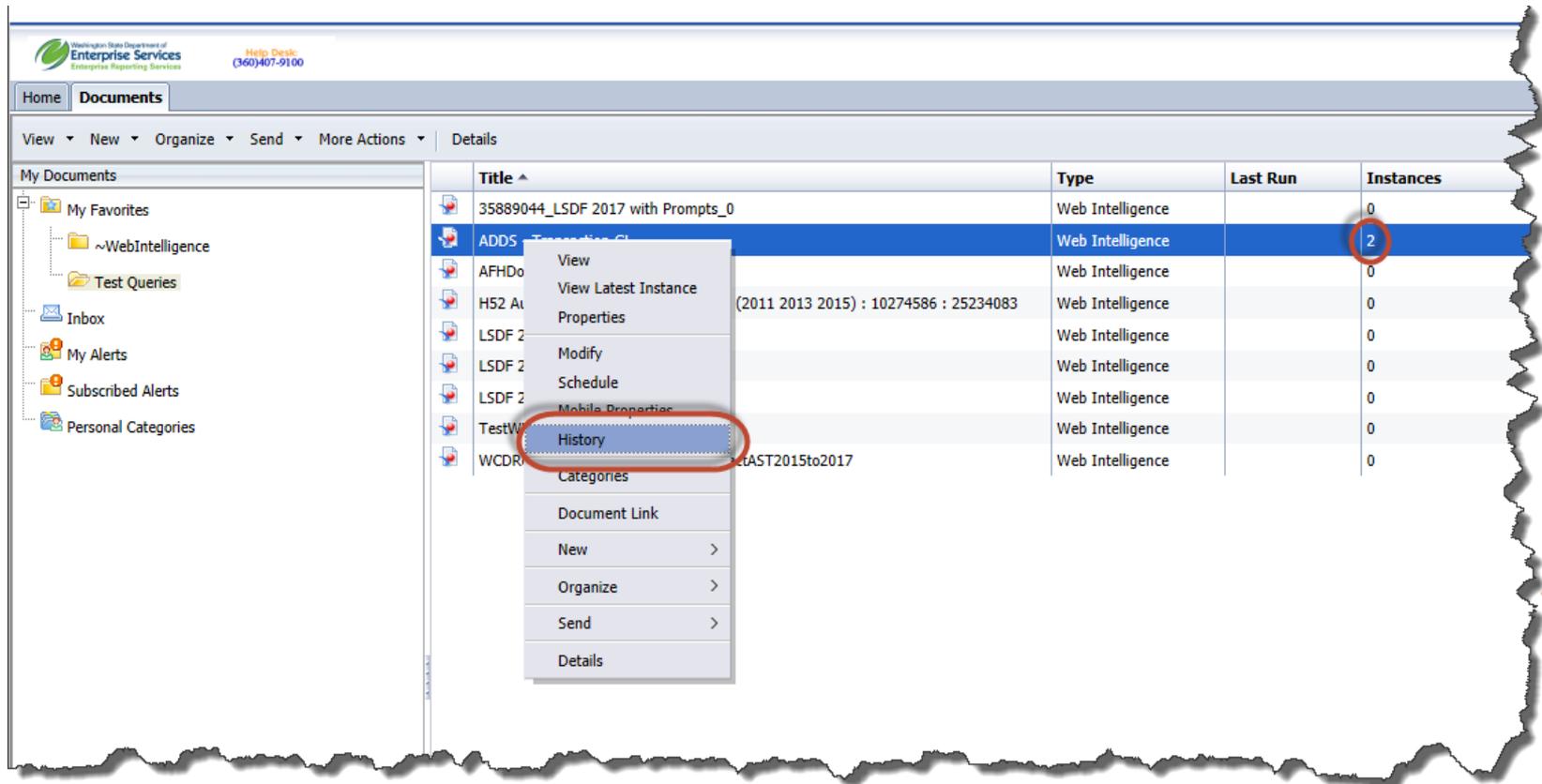
- **File System**

This option saves the instance to the specified file location.

11. Click Schedule

Removing Scheduled Reports

1. Locate the Report History by right clicking on the reports which shows active instances
2. Select History

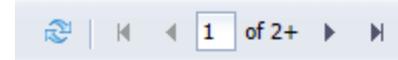


The screenshot displays the 'Enterprise Reporting Services' interface. The top navigation bar includes 'Home' and 'Documents' tabs. Below the navigation bar, there are menu options: 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main content area is divided into two panes. The left pane, titled 'My Documents', shows a folder structure with 'My Favorites' containing '~WebIntelligence' and 'Test Queries', and 'Personal Categories'. The right pane displays a table of reports with the following columns: 'Title', 'Type', 'Last Run', and 'Instances'. The table contains several rows of reports, all of which are 'Web Intelligence' type. The 'Instances' column shows the number of active instances for each report. The report 'ADD5' has 2 instances, which is circled in red. A context menu is open over the 'ADD5' row, with the 'History' option highlighted and circled in red.

Title	Type	Last Run	Instances
35889044_LSDF 2017 with Prompts_0	Web Intelligence		0
ADD5	Web Intelligence		2
AFHDo	Web Intelligence		0
H52 A	Web Intelligence	(2011 2013 2015) : 10274586 : 25234083	0
LSDF 2	Web Intelligence		0
LSDF 2	Web Intelligence		0
LSDF 2	Web Intelligence		0
TestW	Web Intelligence		0
WCDR	Web Intelligence	AST2015to2017	0

Removing Scheduled Reports

3. Find the recurring instance and right click
 - a) You may need to sort the columns or use the paging tools if you have more than one page of report history
4. Select Organize and then Delete



History – ADDS - Transaction GL

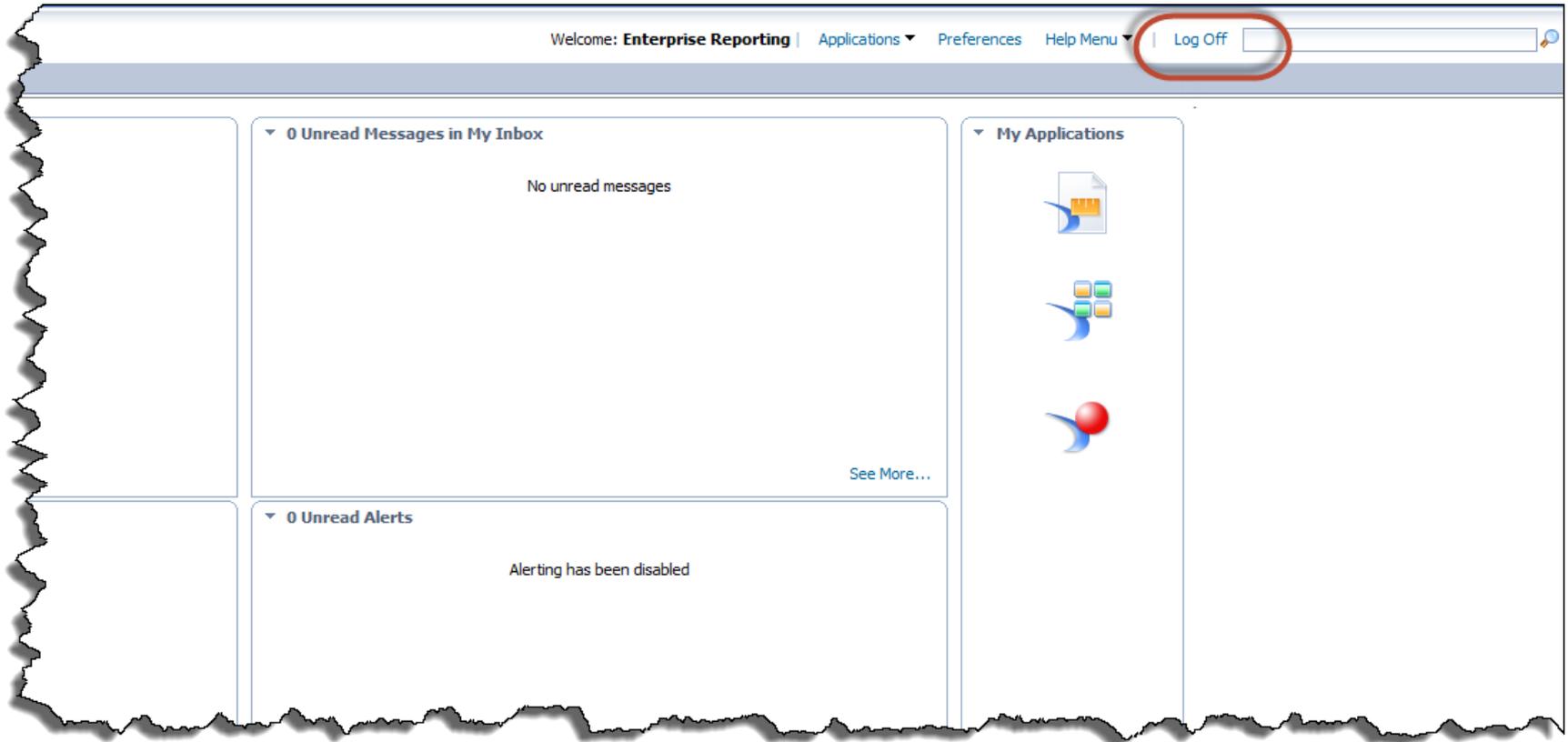
View | Organize | Send | More Actions

Instance Time	Title	Status	Created By	Type	Parameters
Dec 10, 2015 5:08 PM	ADDS - Transaction GL	Success	guldand163	Web Intelligence	116
Dec 10, 2015 5:08 PM	ADDS - Transaction GL	Recurring	guldand163	Web Intelligence	

The screenshot shows a table with two rows. The second row is highlighted in blue and has a context menu open over it. The 'Recurring' status in the second row is circled in red. The context menu includes options: HistoryStatus, View, Organize (with a sub-menu containing Delete), More Actions, Pause, and Run Now. The 'Organize' option is highlighted in blue, and the 'Delete' option is also highlighted in blue.

Questions

To log off click the **Log Off** button.



Additional Resources

SAP Business Objects Web Intelligence Product Tutorials

- <http://scn.sap.com/docs/DOC-7819>

