Enterprise Reporting

Introduction to Web Intelligence

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Introductions

- 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	Web Intelligence
• Pre-defined reports • Report scheduling and viewing application	• Self service reporting • For querying, organizing, and analyzing data

Hours of Operation

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 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.

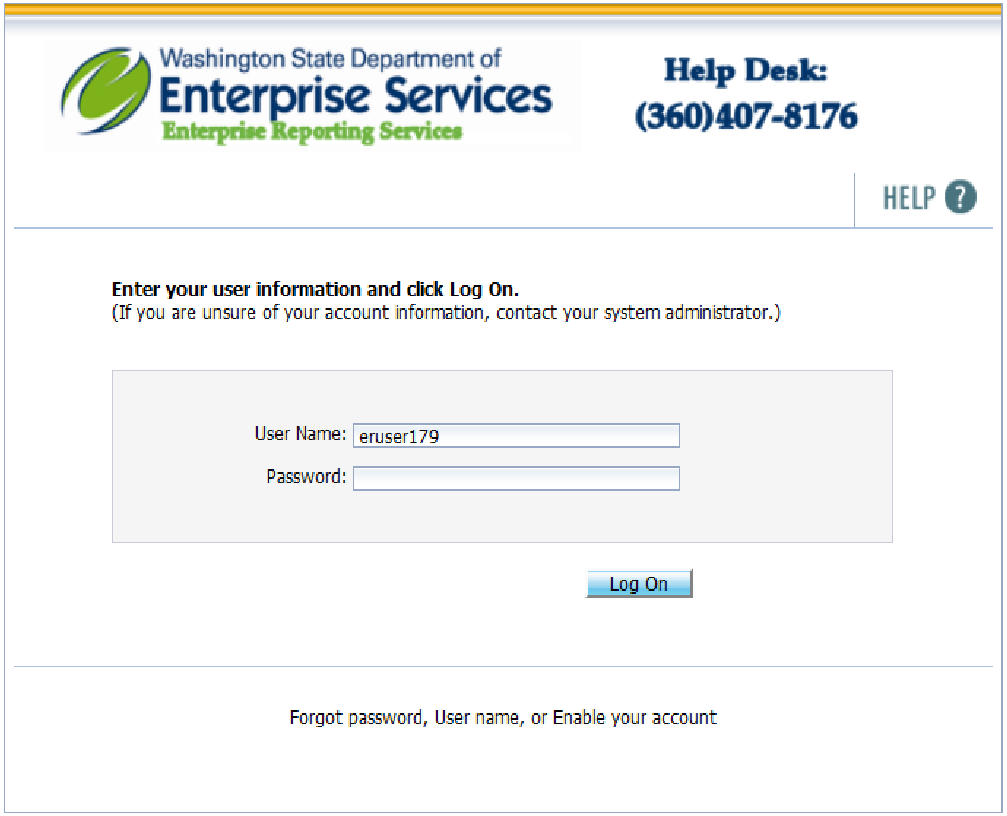
This guide only includes information for access within the SGN.

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.



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

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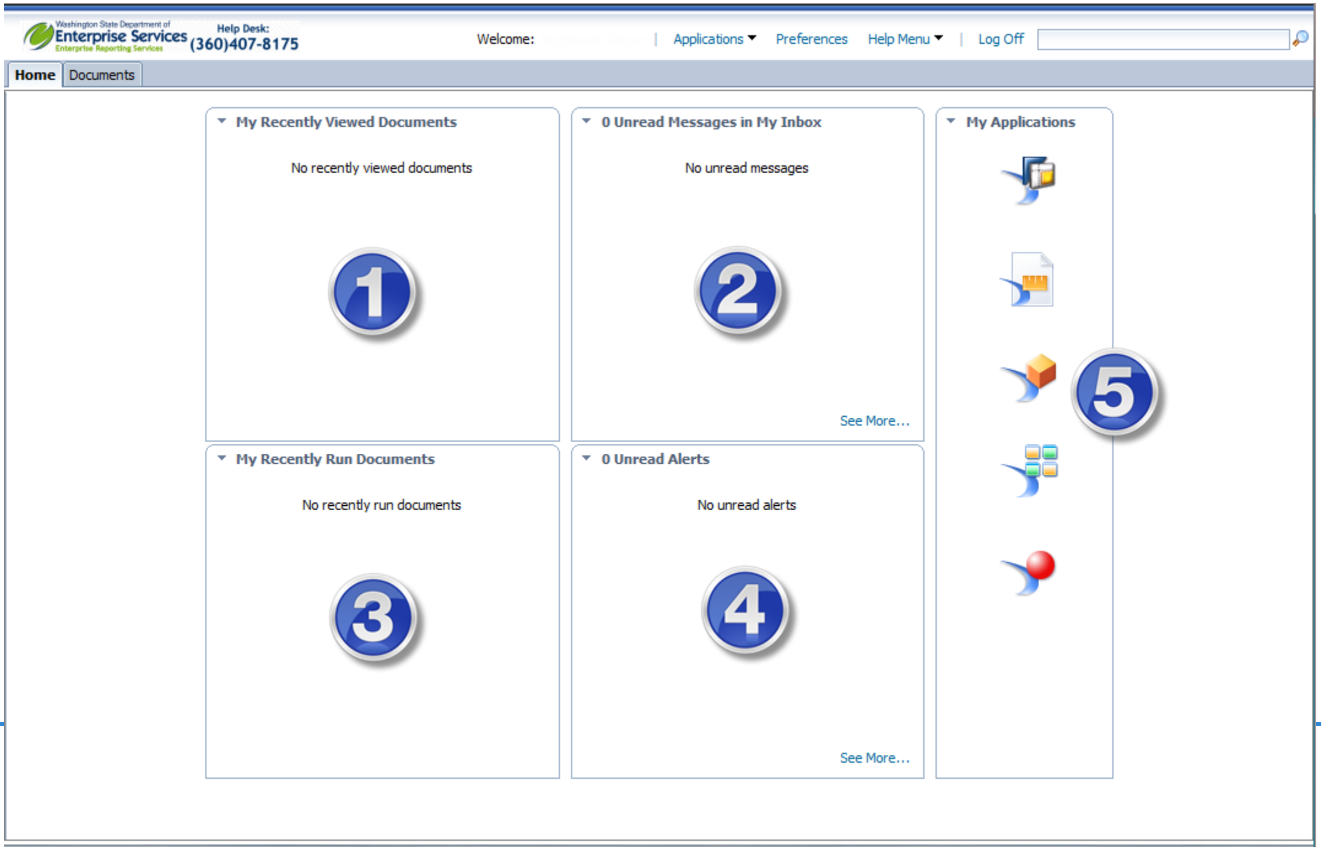
BI Launch Pad Navigation

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



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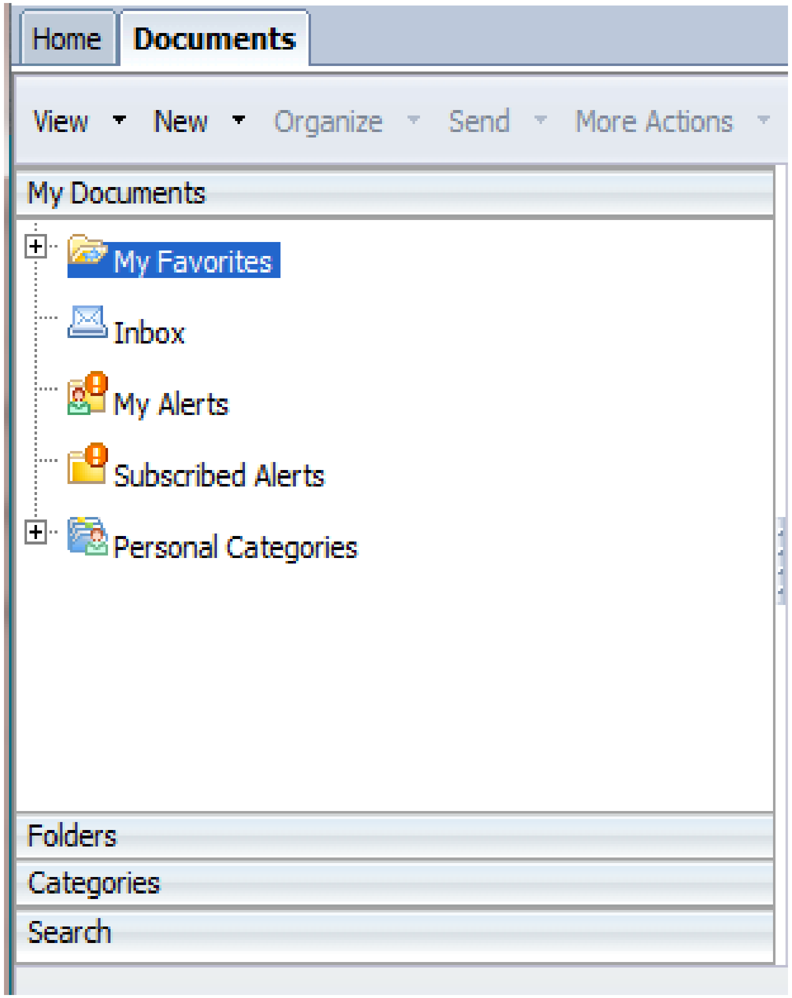
Folder Structure

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.

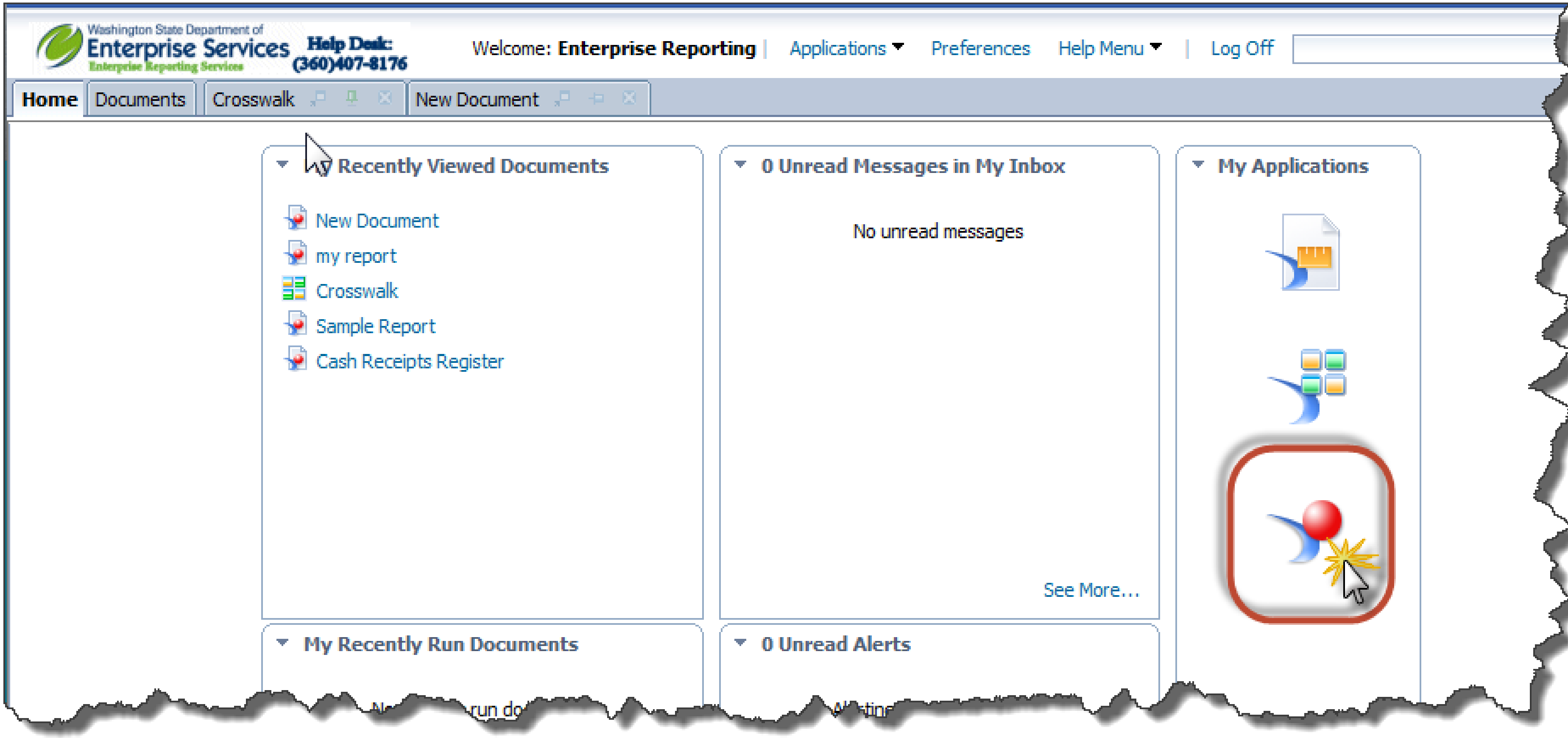
The document can be very simple or very complex, depending on the user's business need at the time.

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.

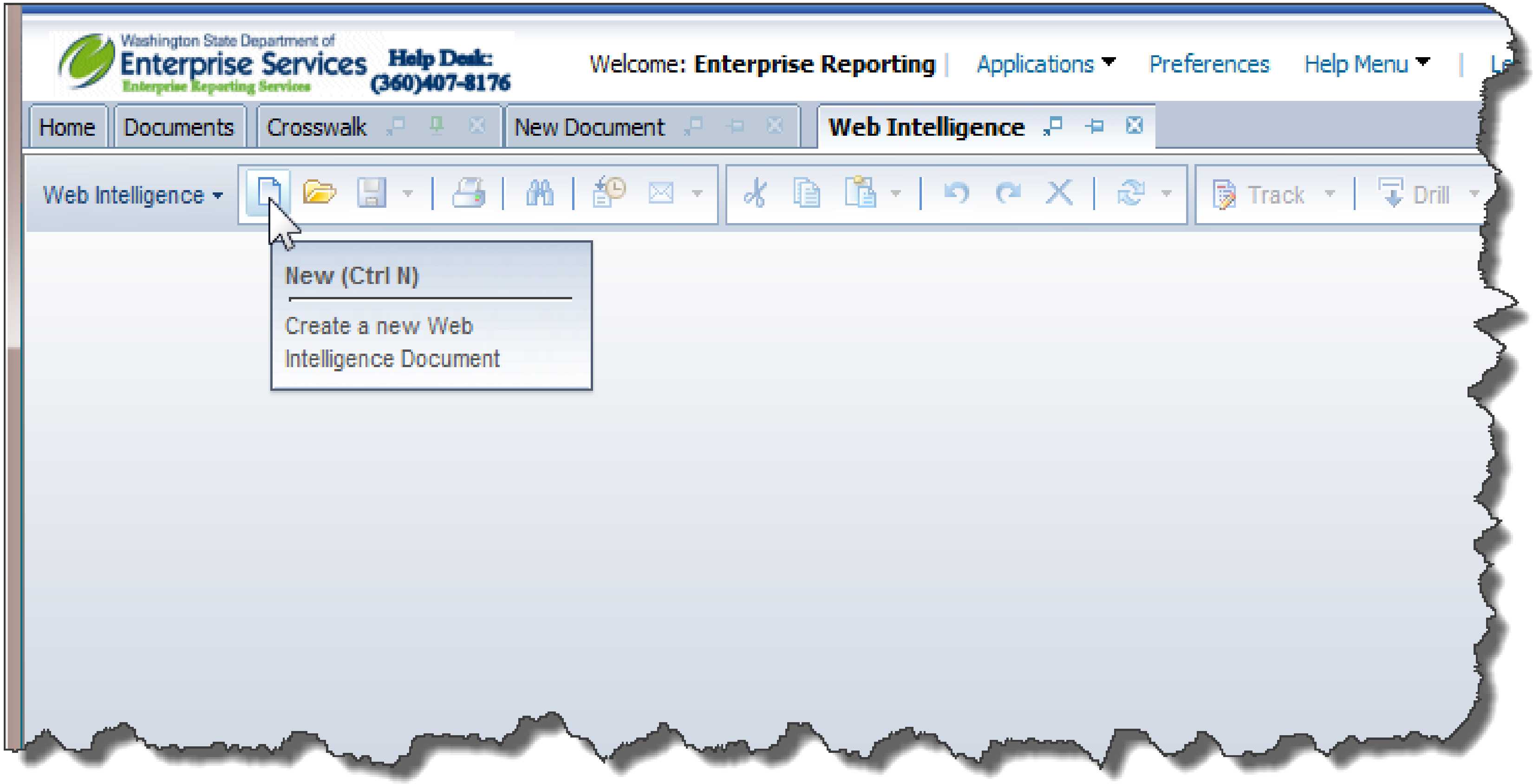
Creating New Web Intelligence Document

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



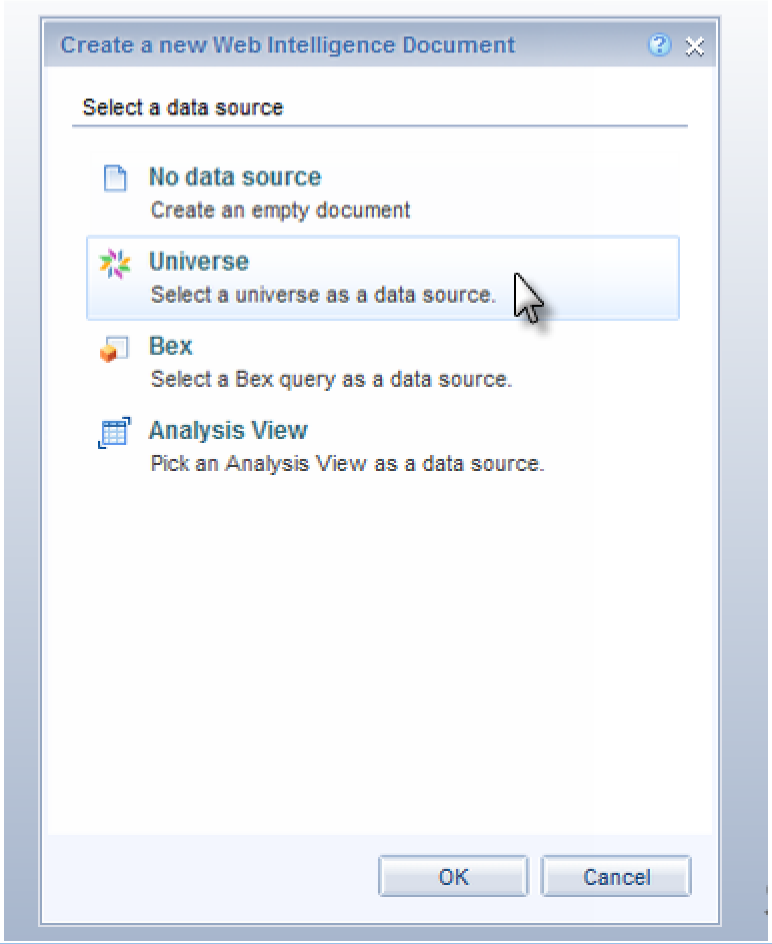
Creating New Web Intelligence Document

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



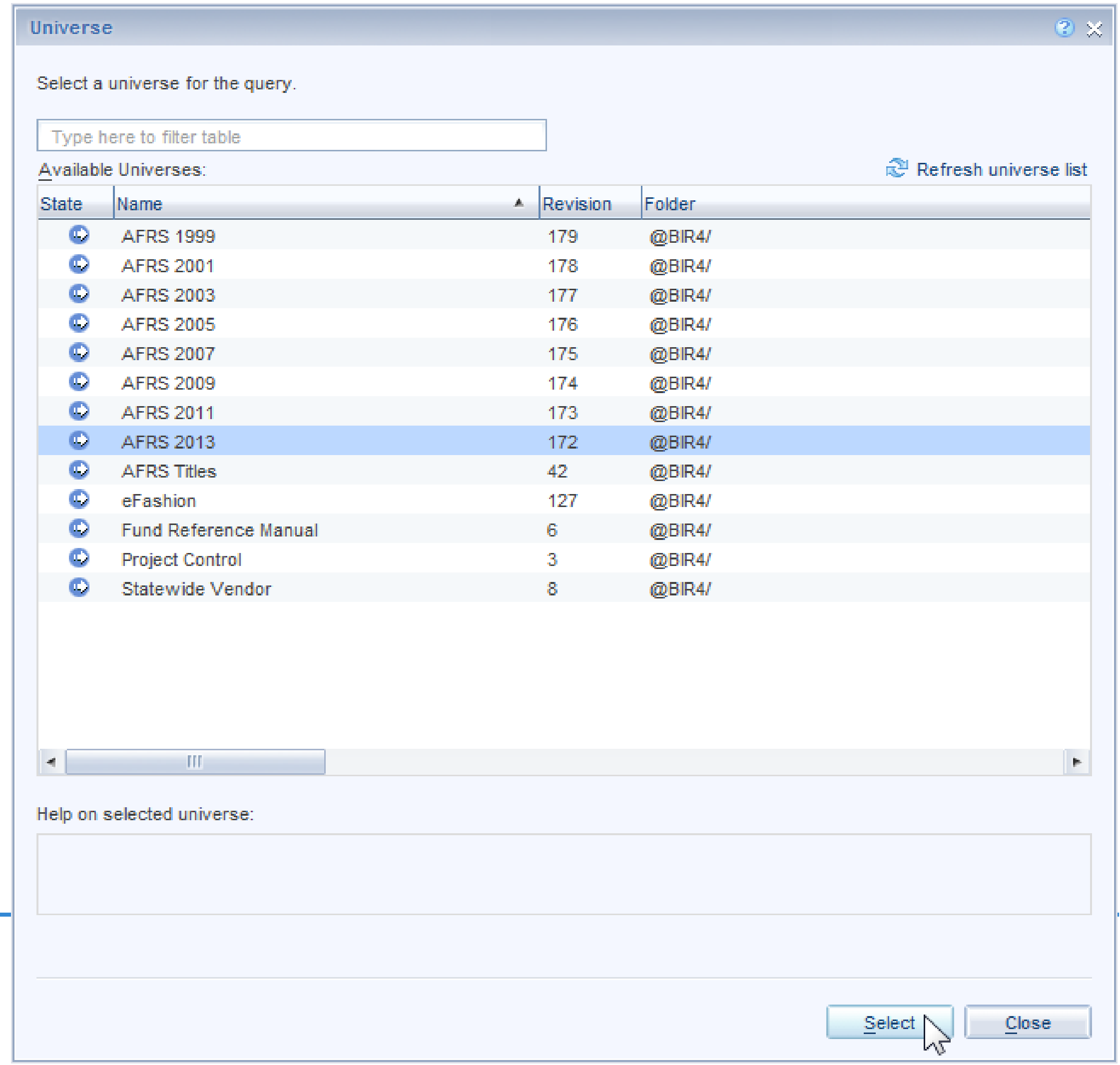
Creating New Web Intelligence Document

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**



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

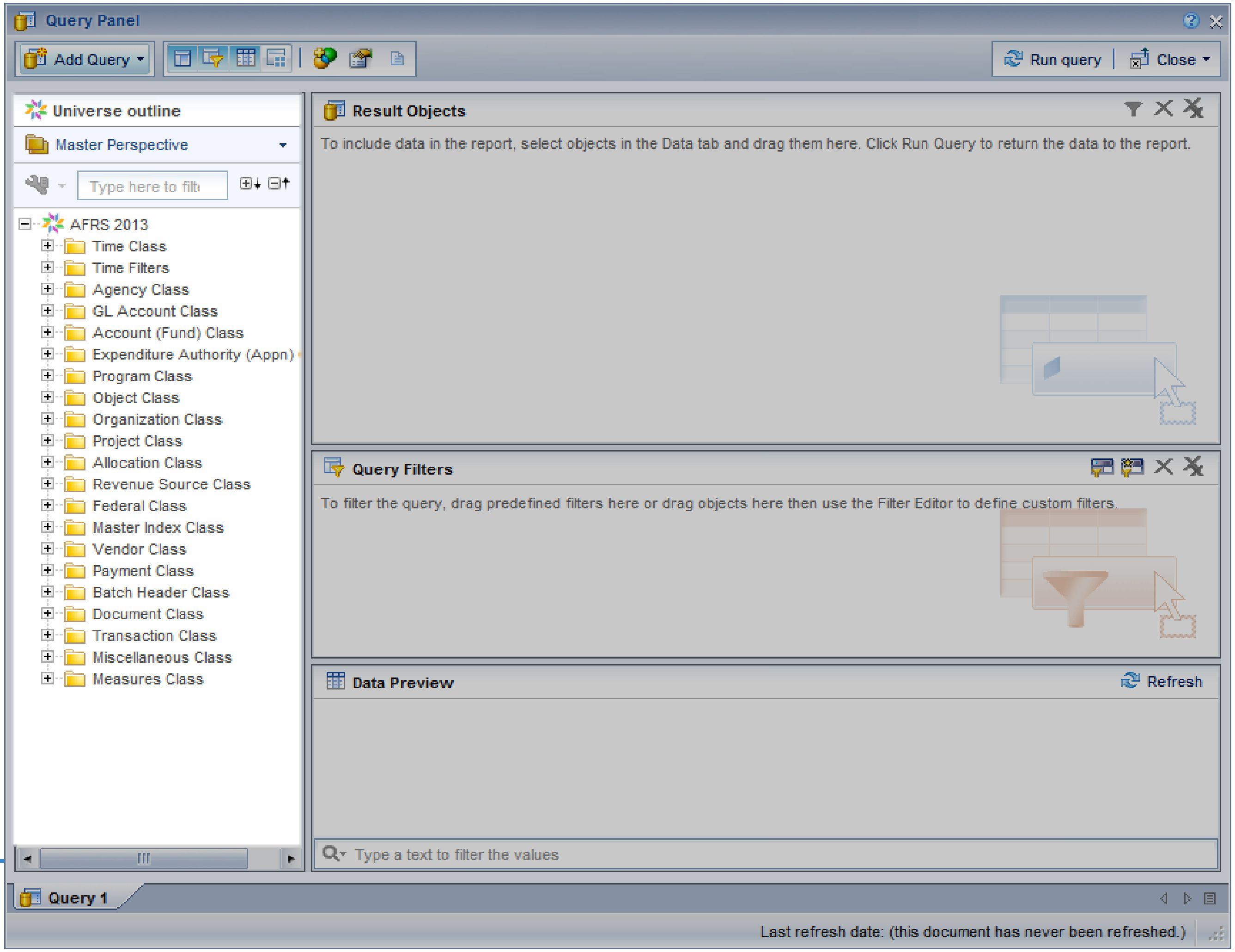
An object is a named component that maps to data or a derivation of data in the database.

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

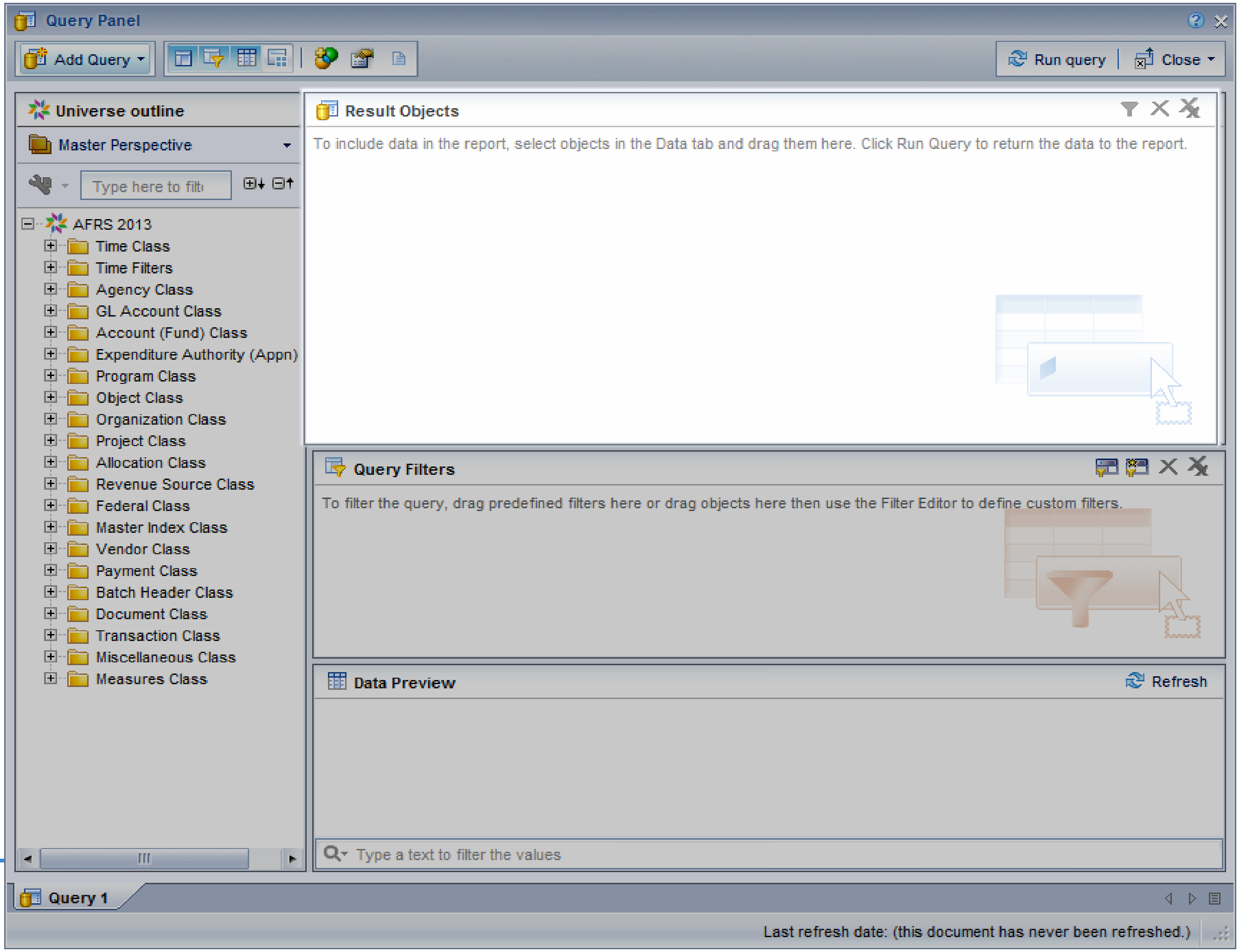
Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

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



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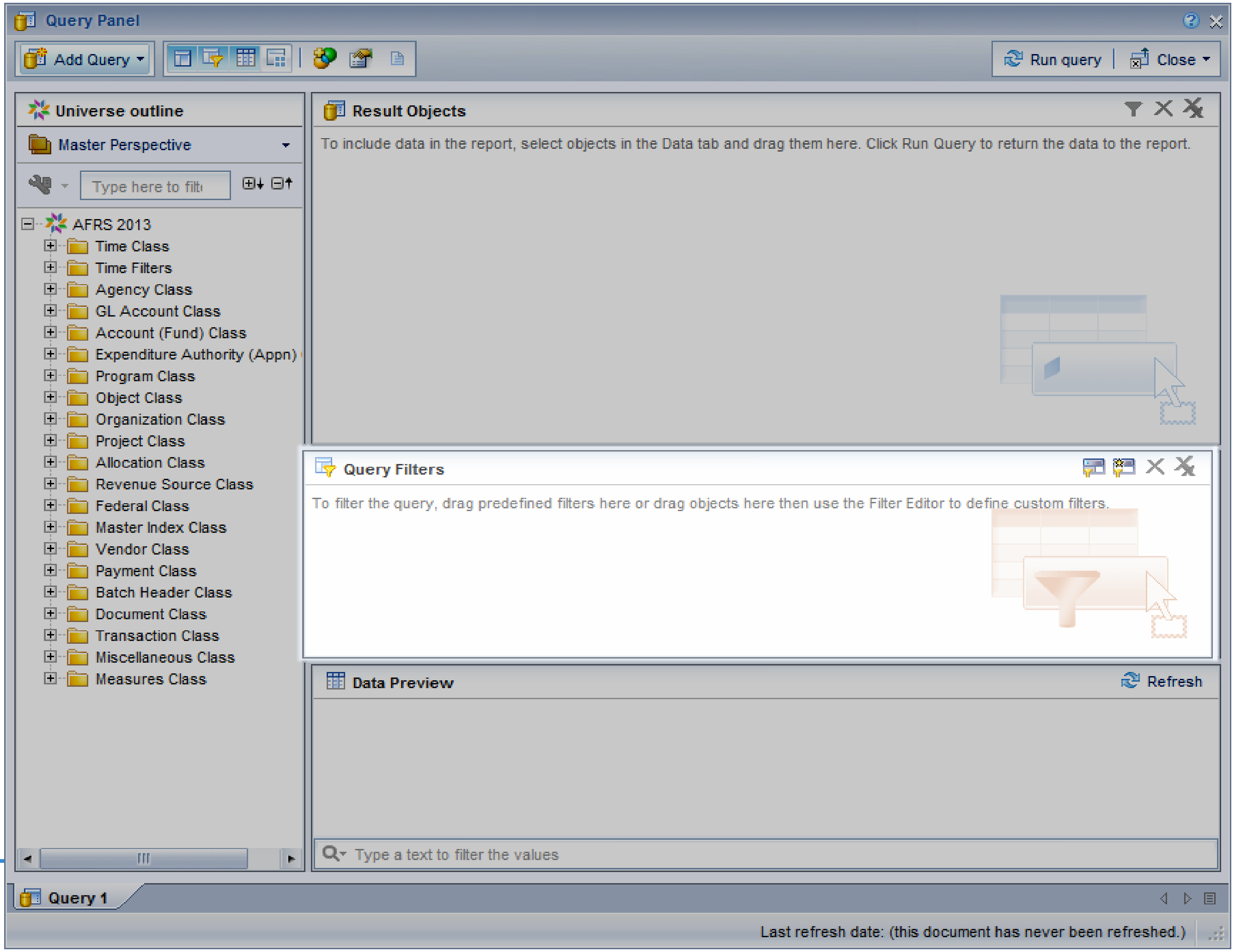
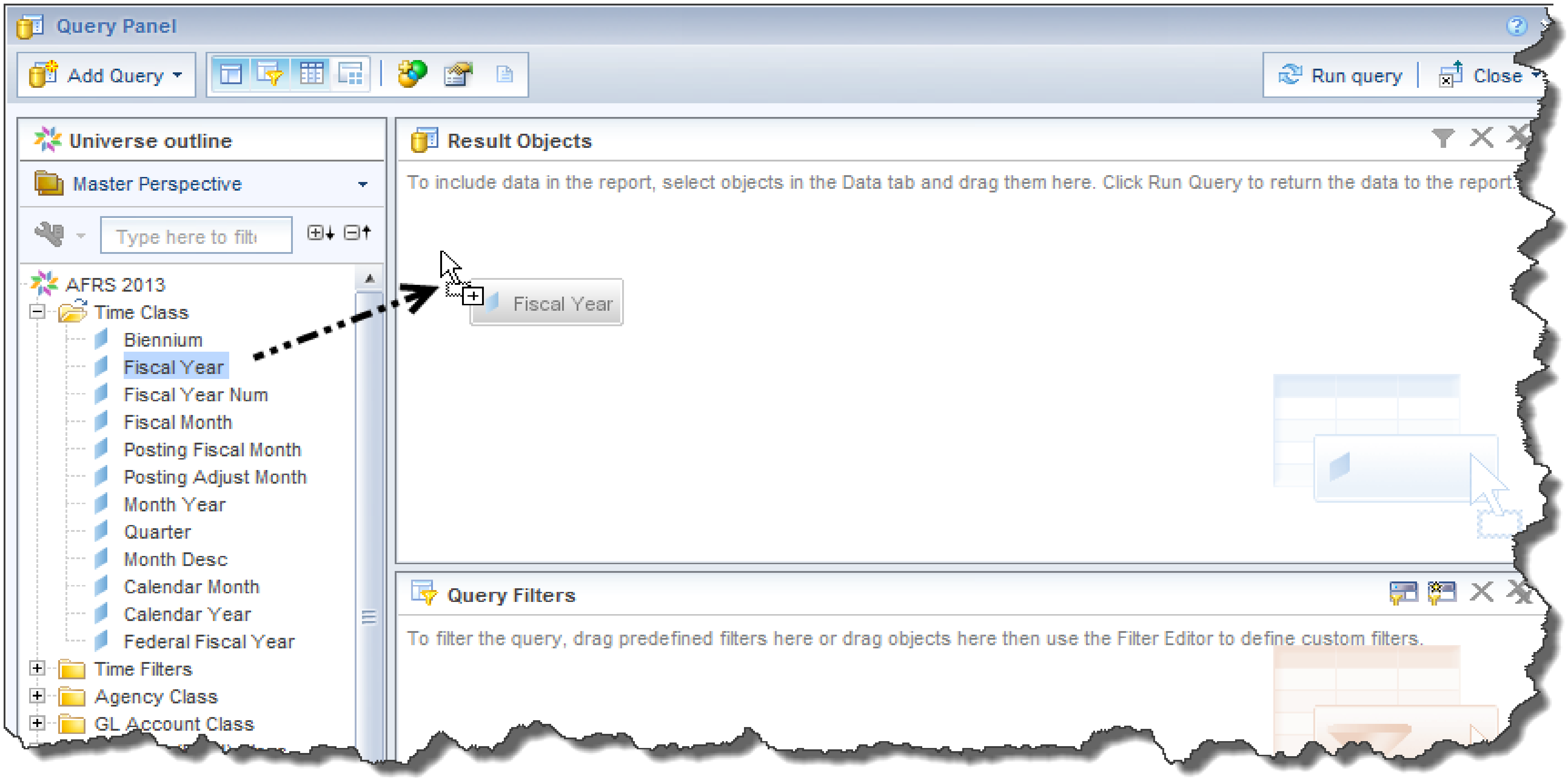
Creating New Web Intelligence Document

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



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.



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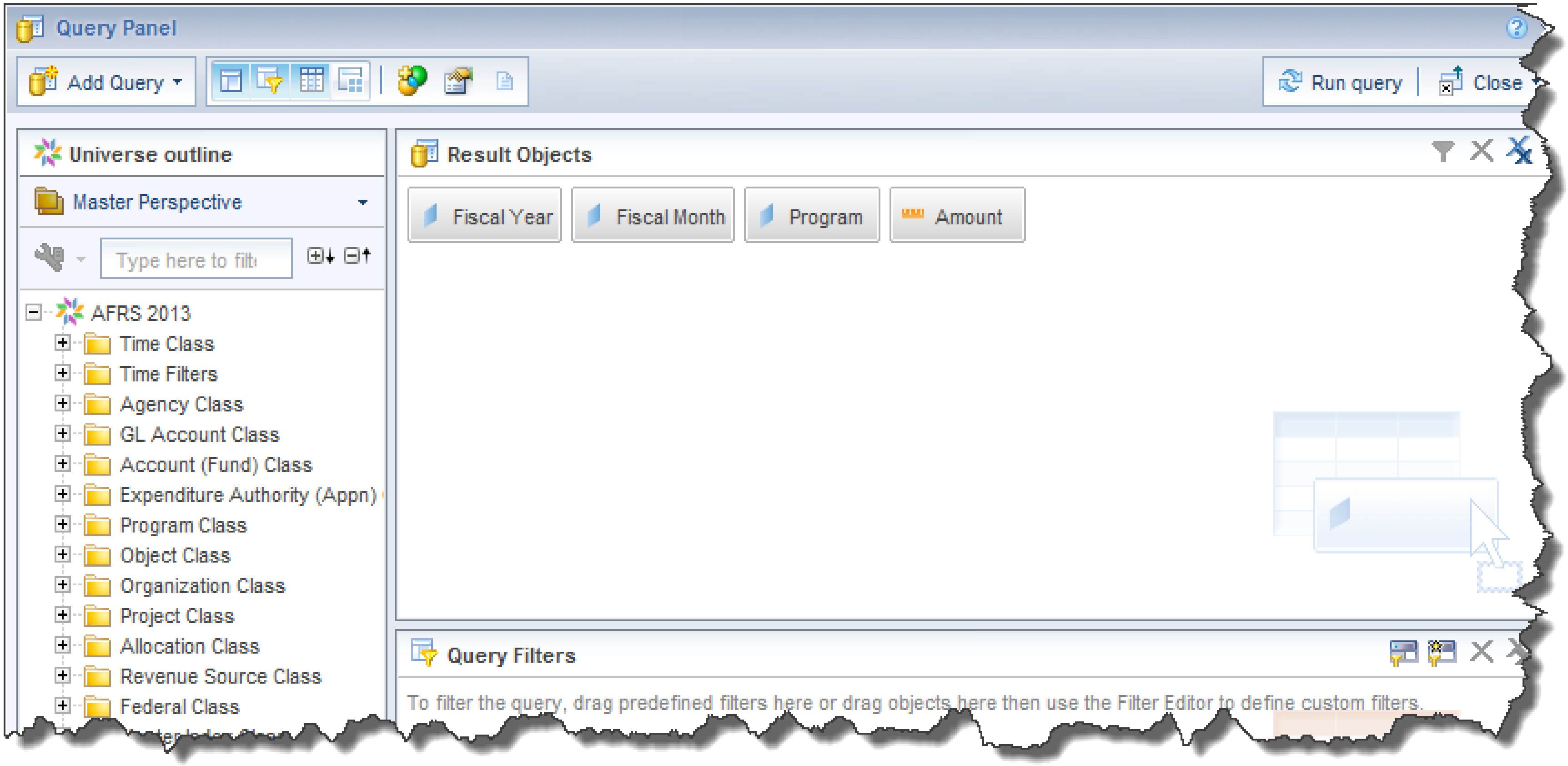
Creating New Web Intelligence Document

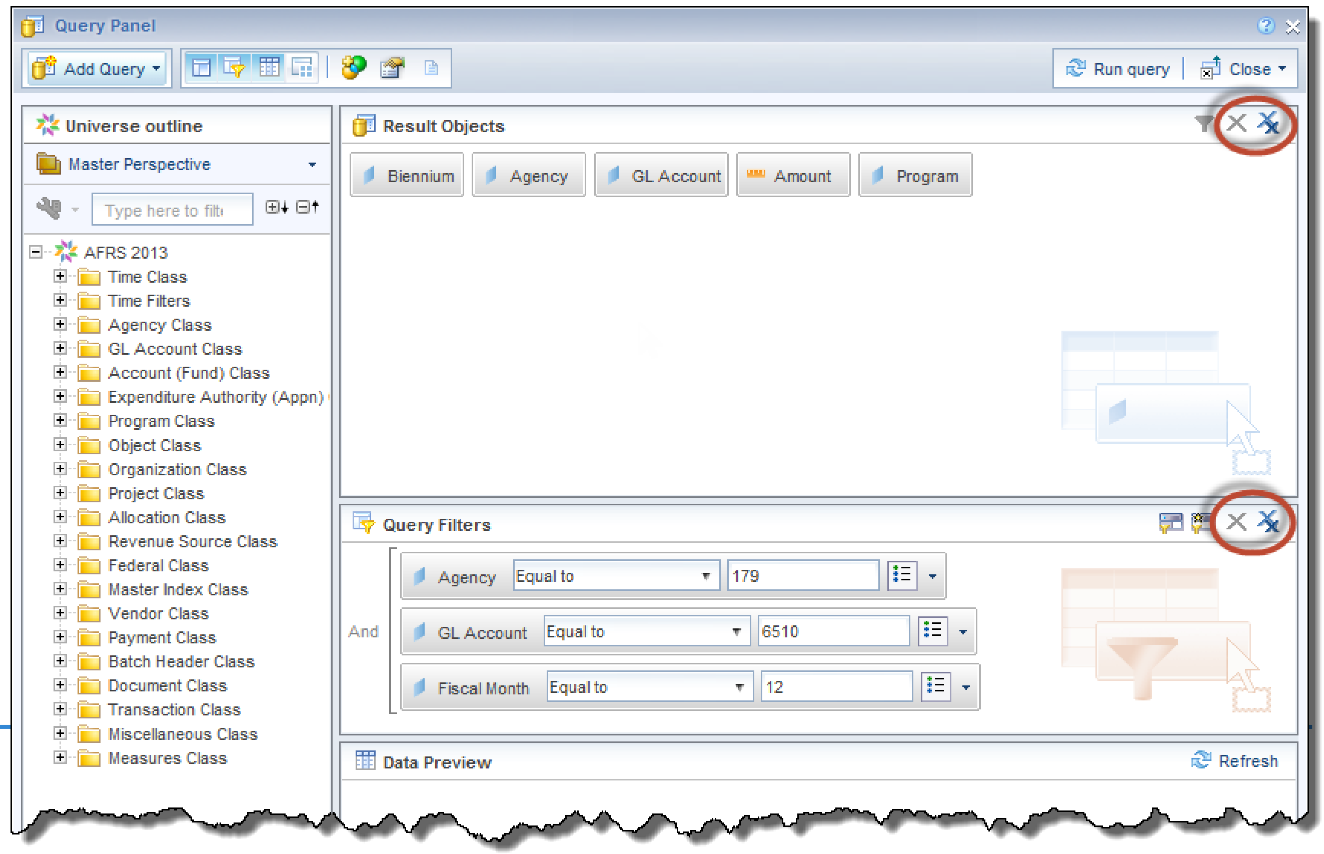
Repeat the previous step until the query contains all the objects you want to include.



Creating New Web Intelligence Document

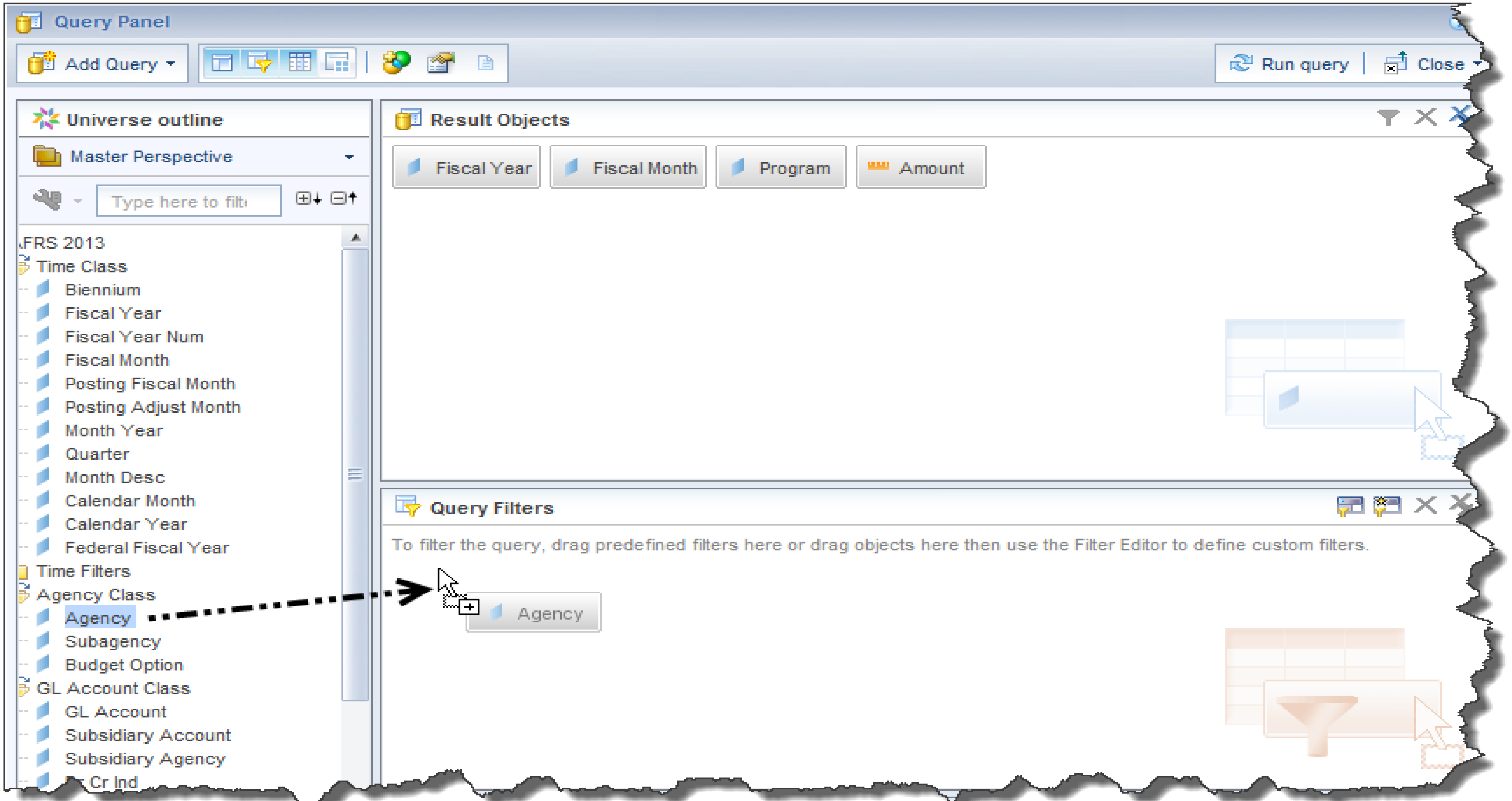
To remove an object from the **Result Objects** or **Query Filters** panes, click **Remove** at the top right corner of the pane.

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



Creating New Web Intelligence Document

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



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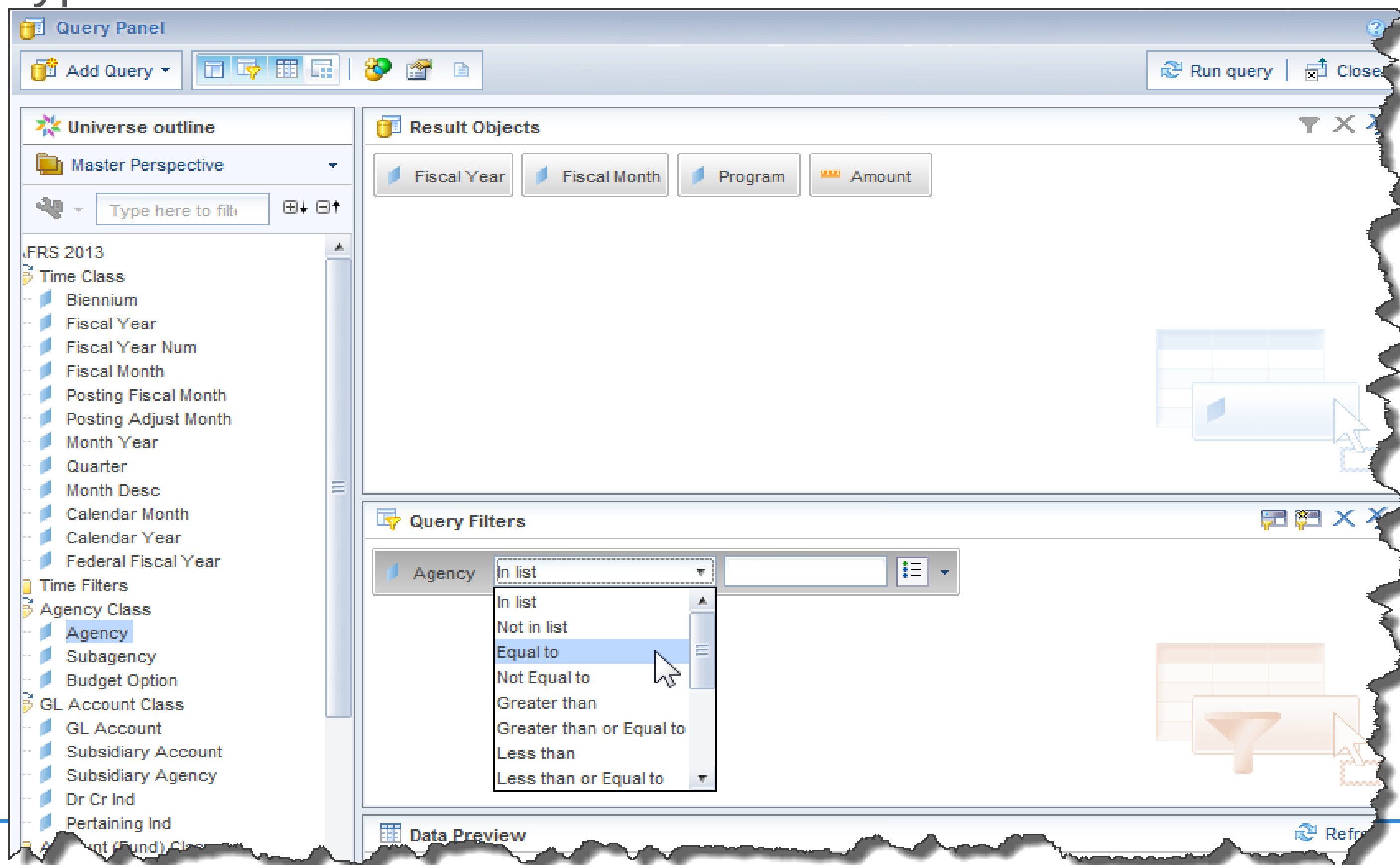
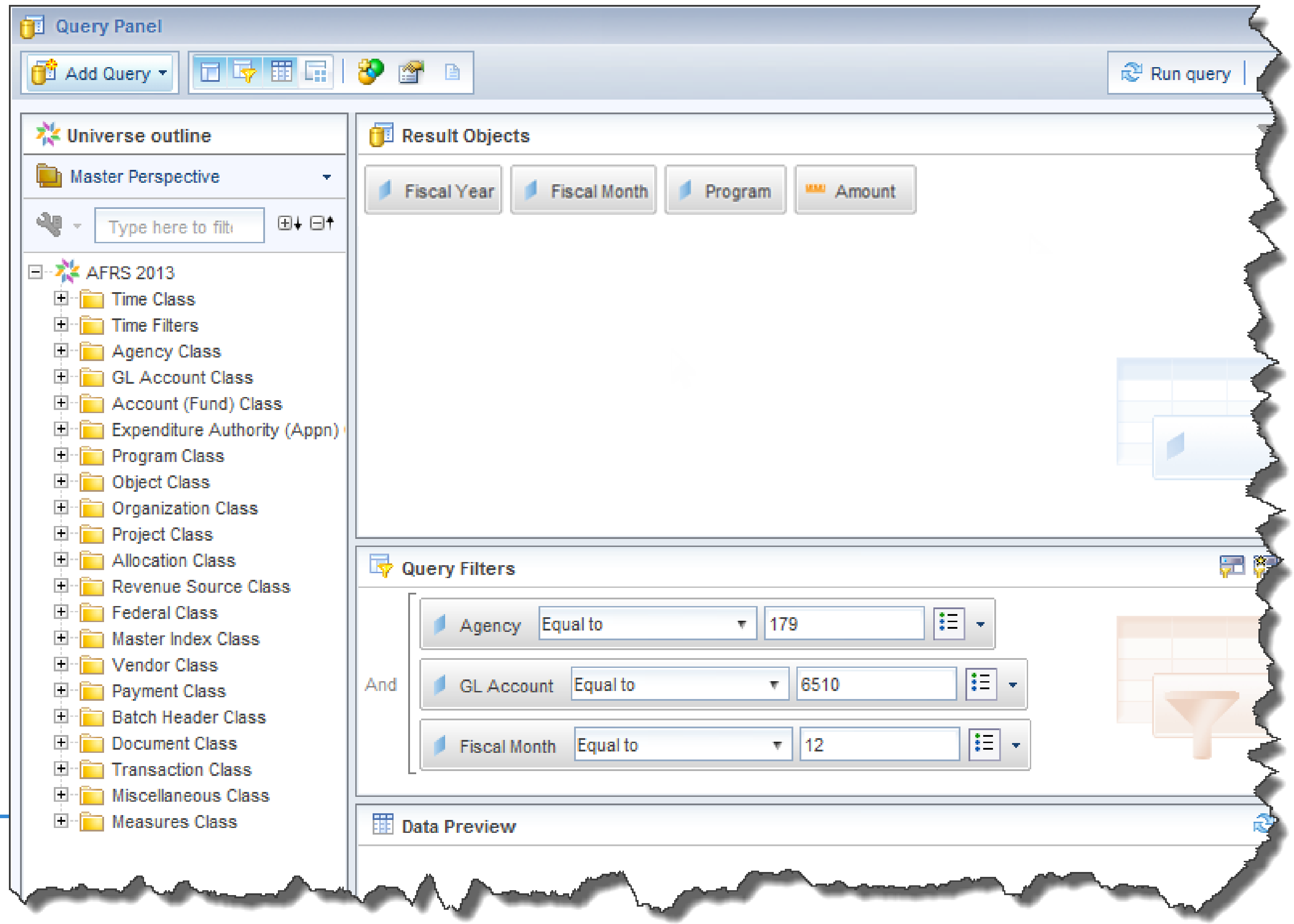
Creating New Web Intelligence Document

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.



Creating New Web Intelligence Document

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



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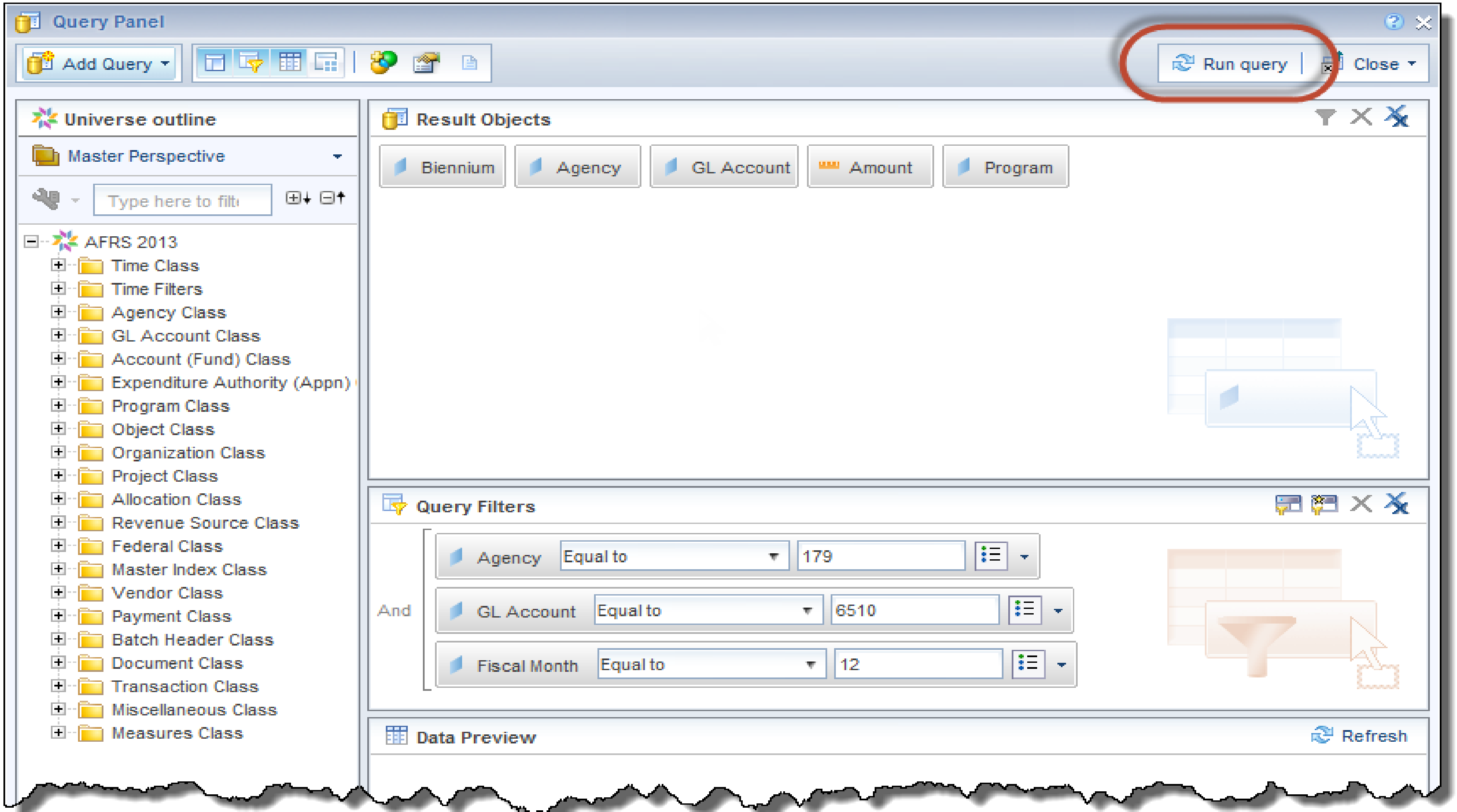
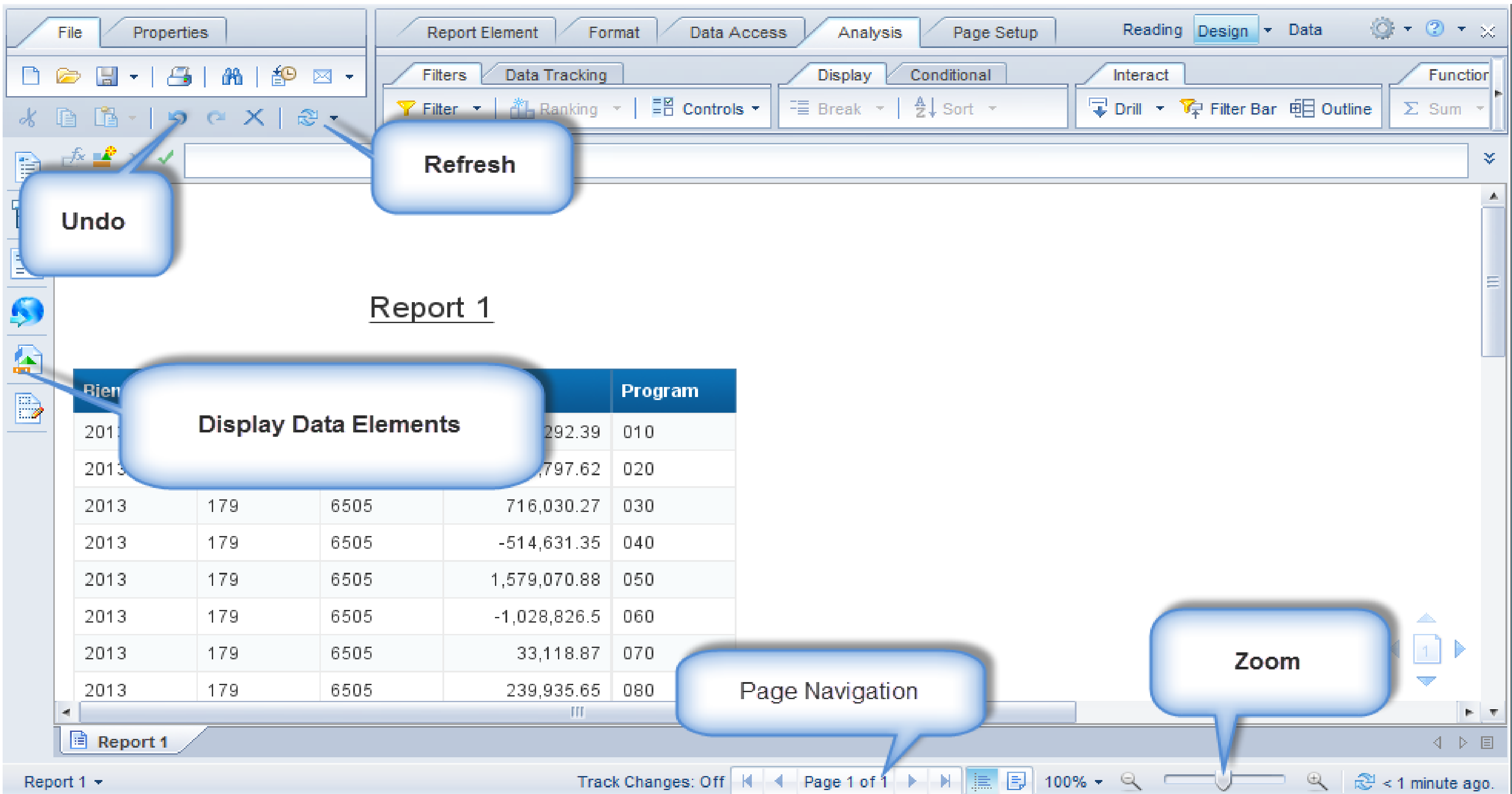
Creating New Web Intelligence Document

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



Navigating the Report Panel

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



Save a Web Intelligence Document

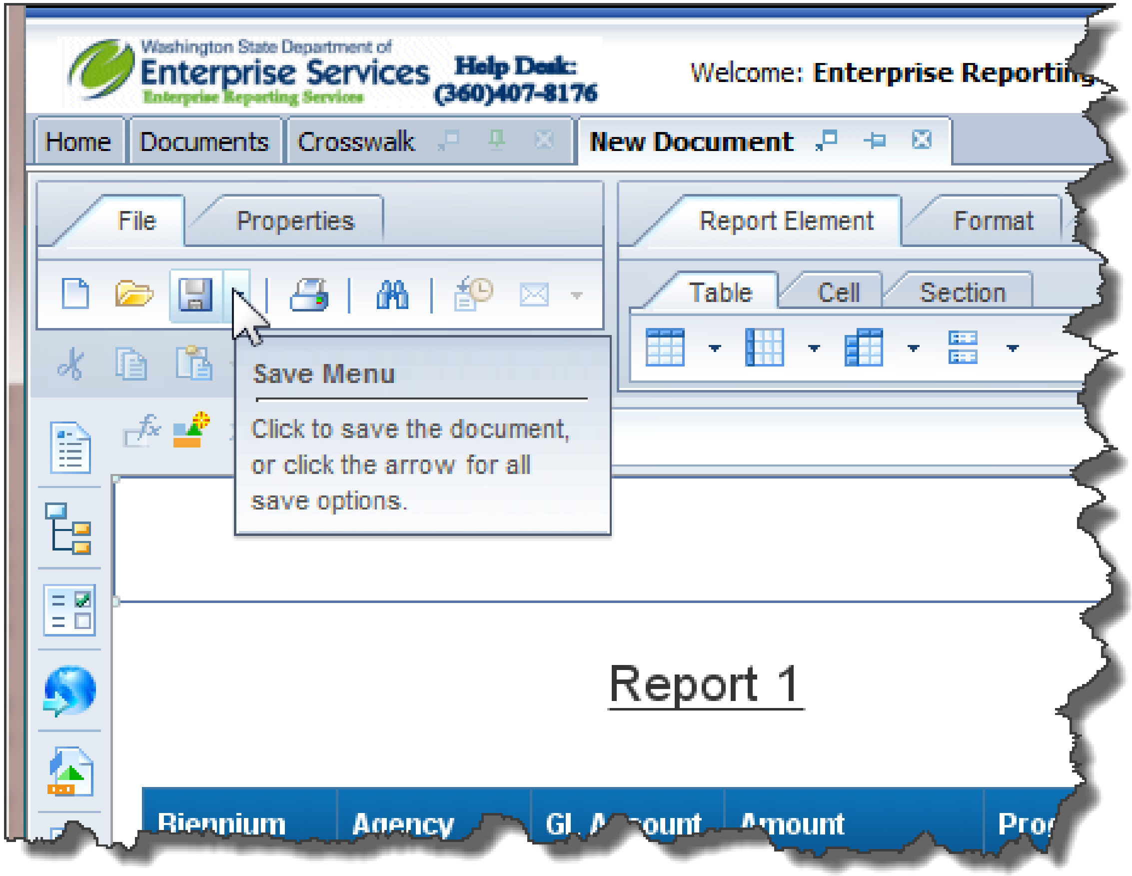
After the query is run, the results will be displayed in the **Report View** window.

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

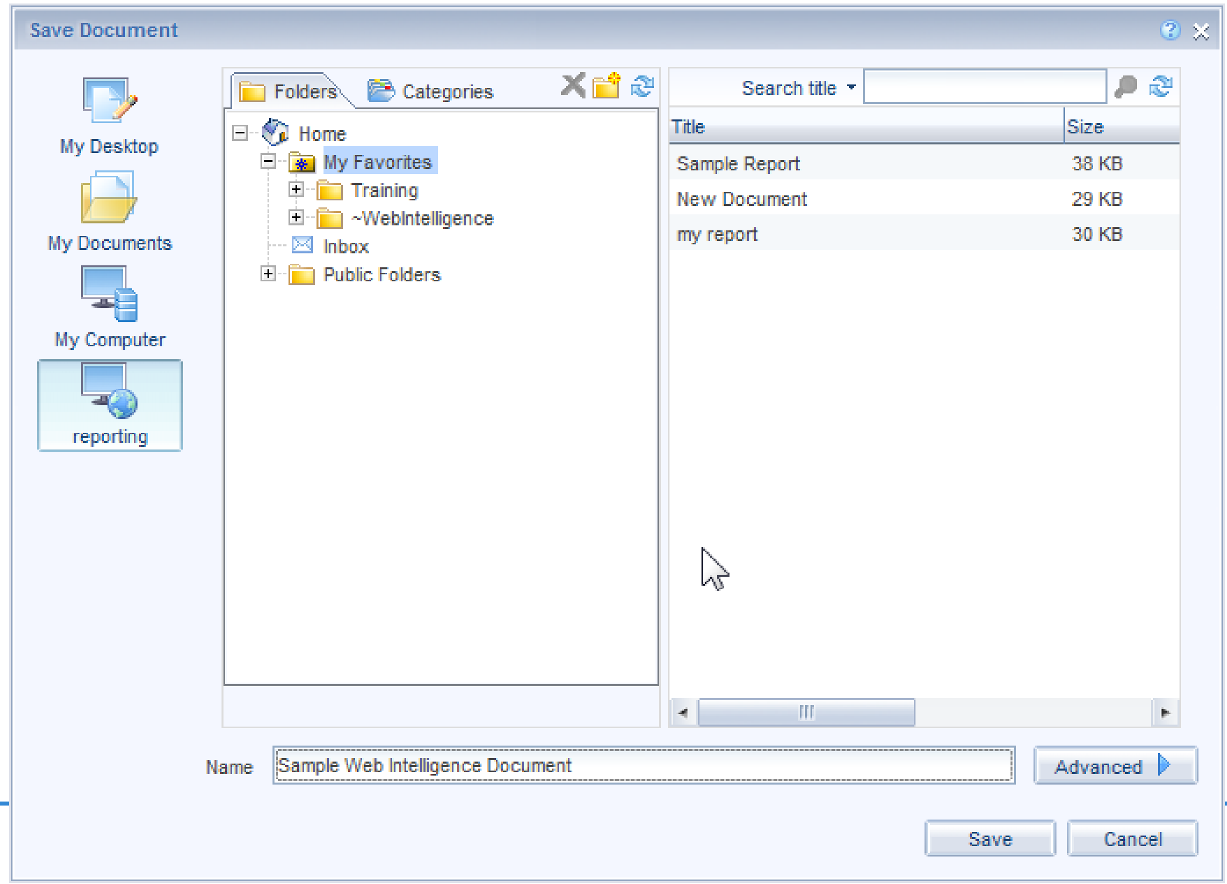
1. To save a Web Intelligence Document click the **Save** button on the upper left corner.



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.*

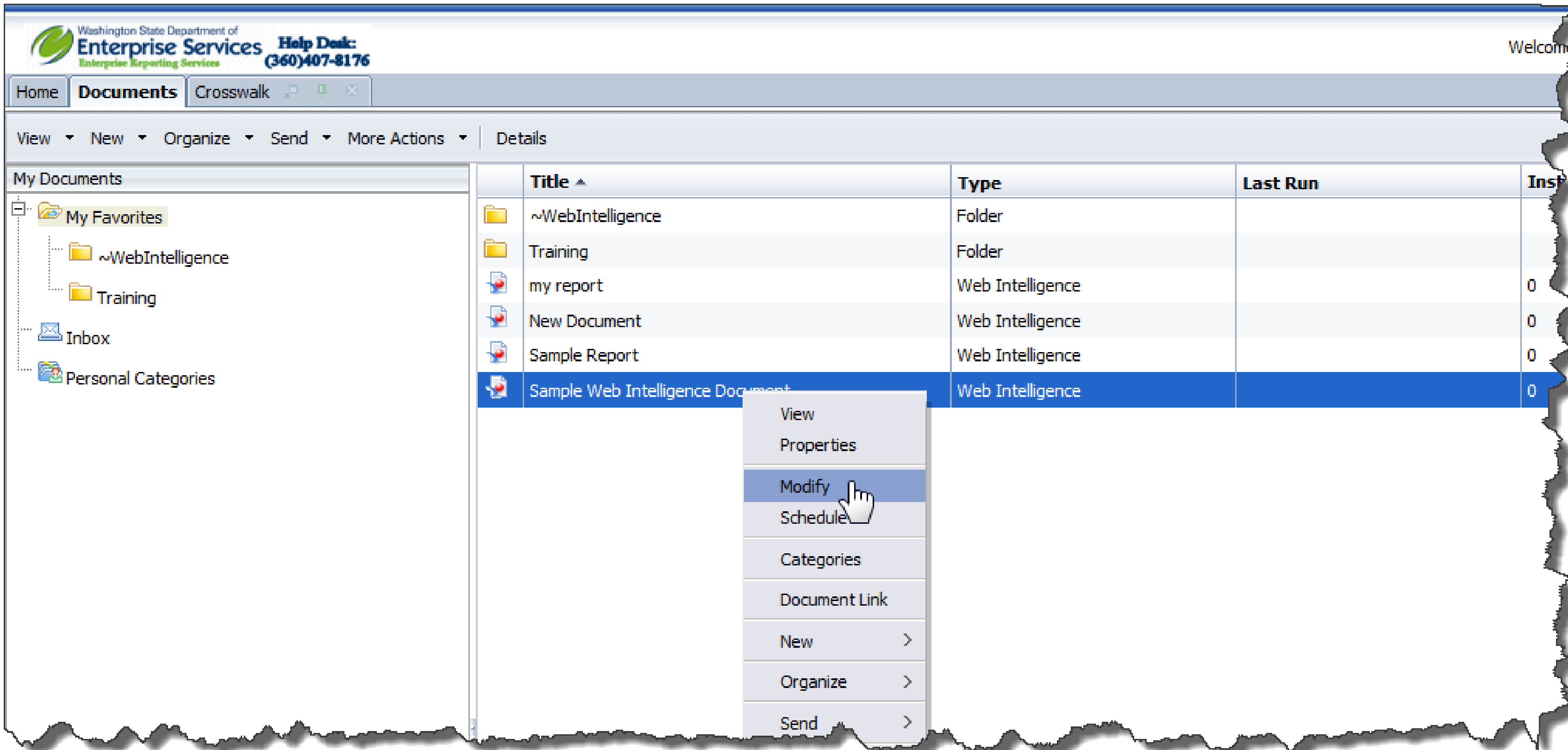


Chapter 5

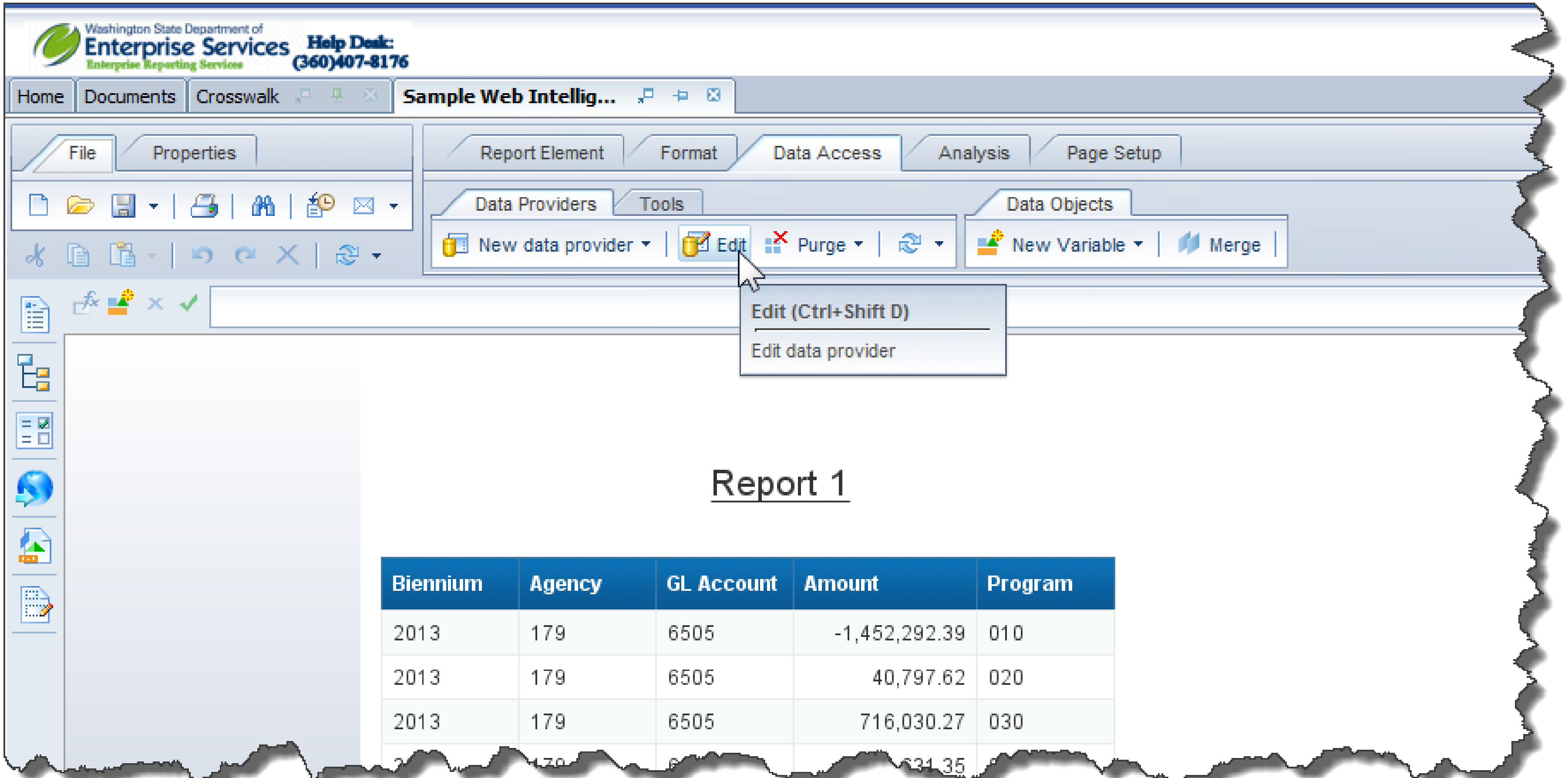
Query Filter Options

Modify a Document

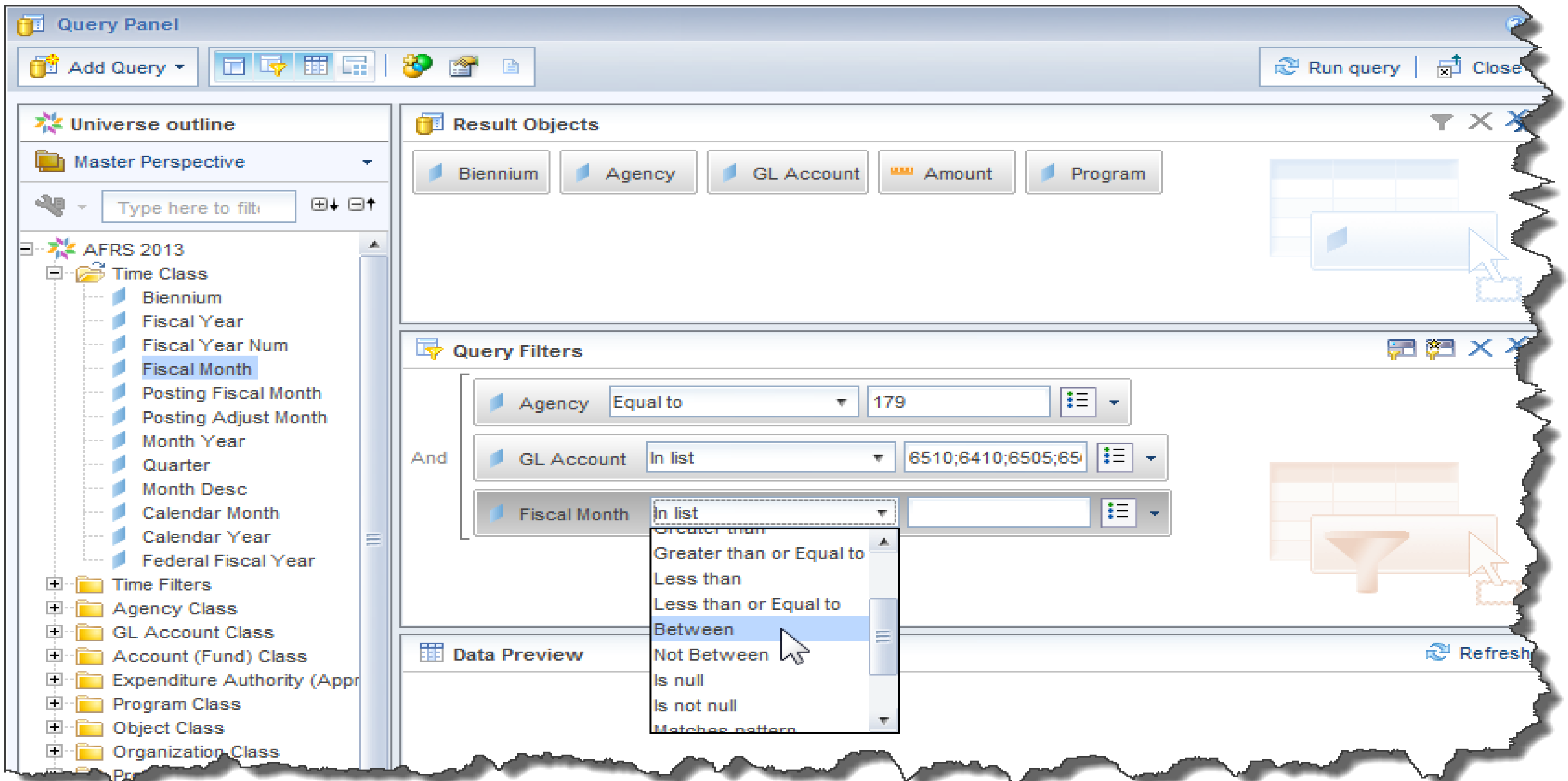
1. Locate your query in your **My Favorites** folder
2. Right click
3. Select **Modify**



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

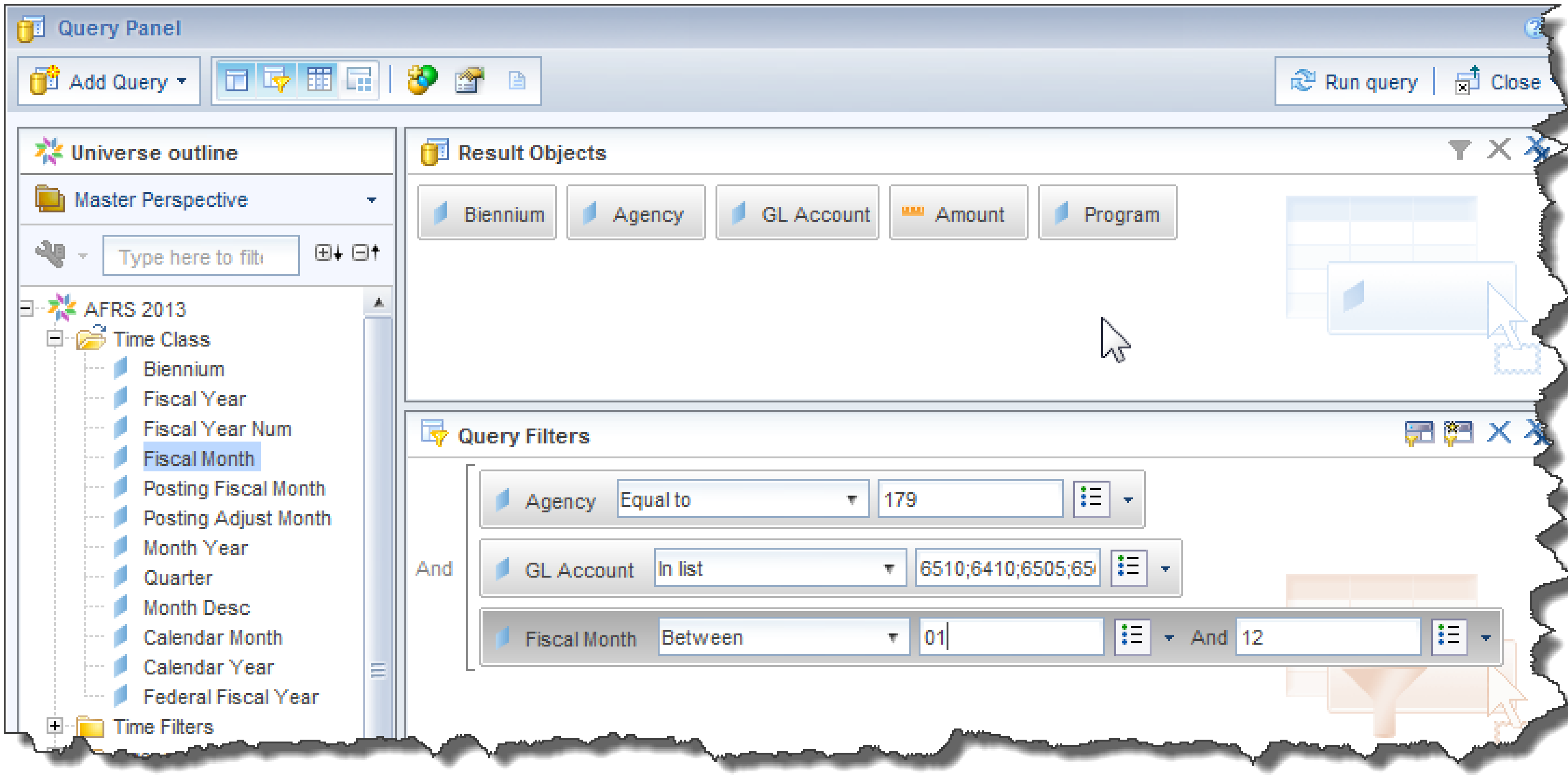


To set a filter using a range of values use the **Between** operator. Since you have placed **Fiscal Month** in the Result Objects you can drag it down to the Query Filter Box. Change the operator to **Between** from the drop down list of operators.



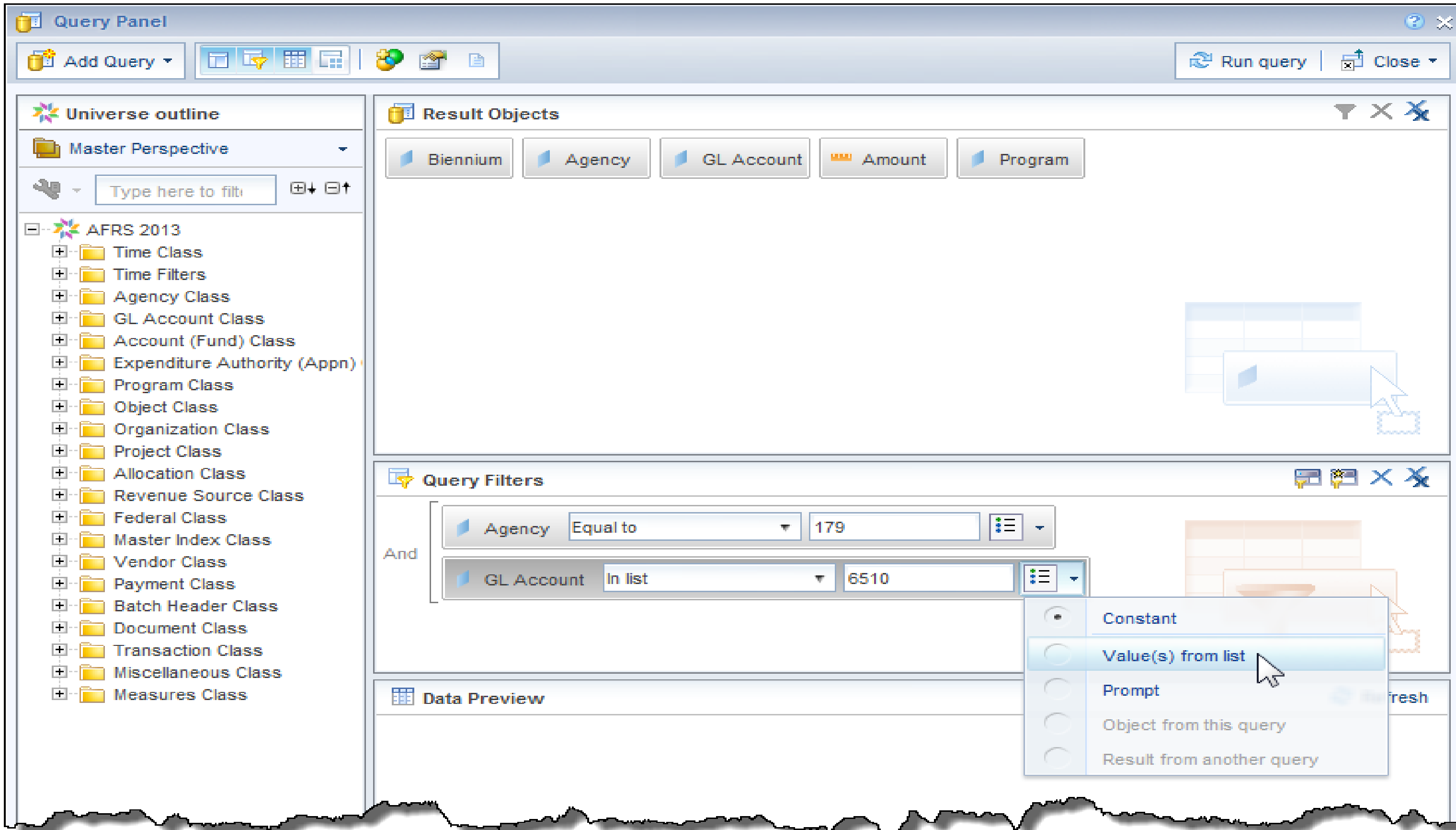
Between

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.



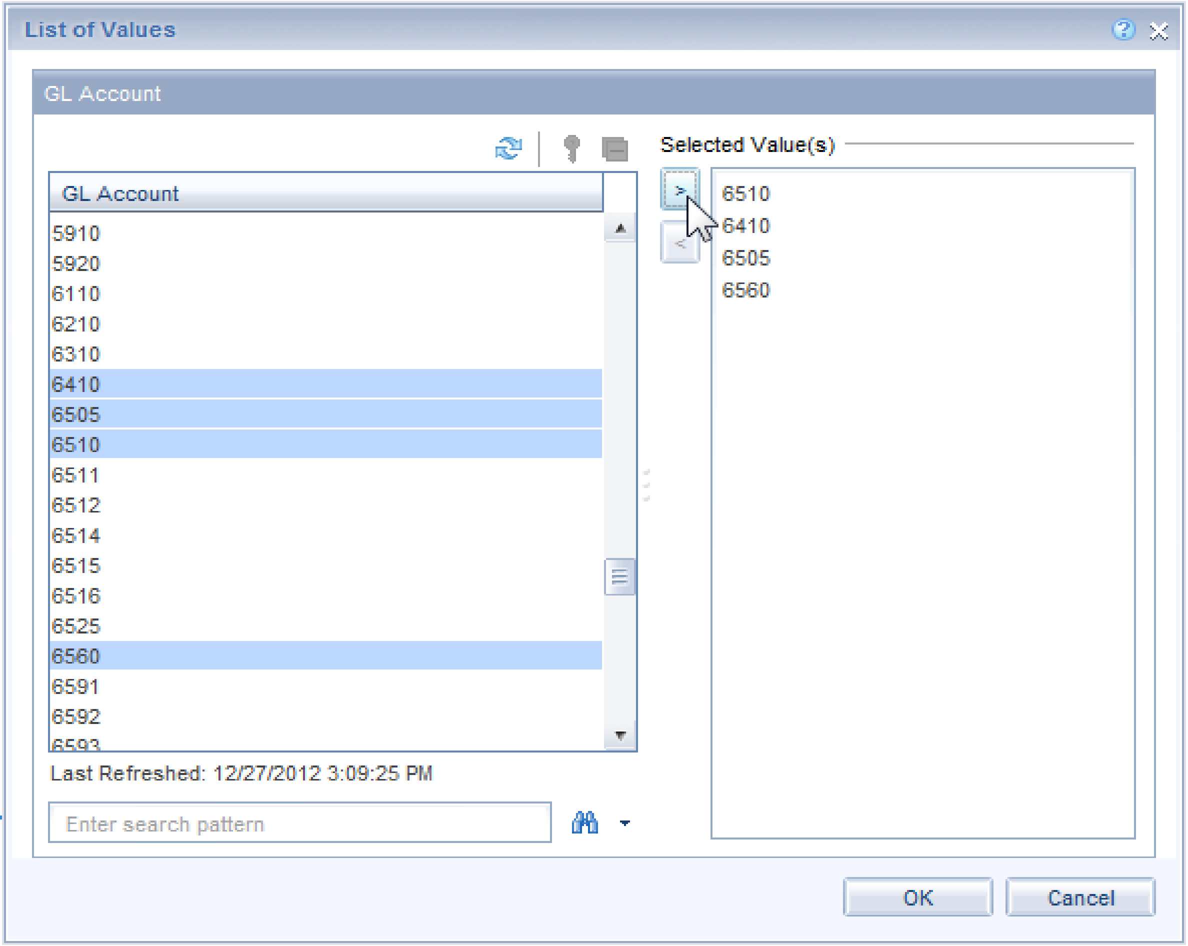
Values from list

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**.



Values from list

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.



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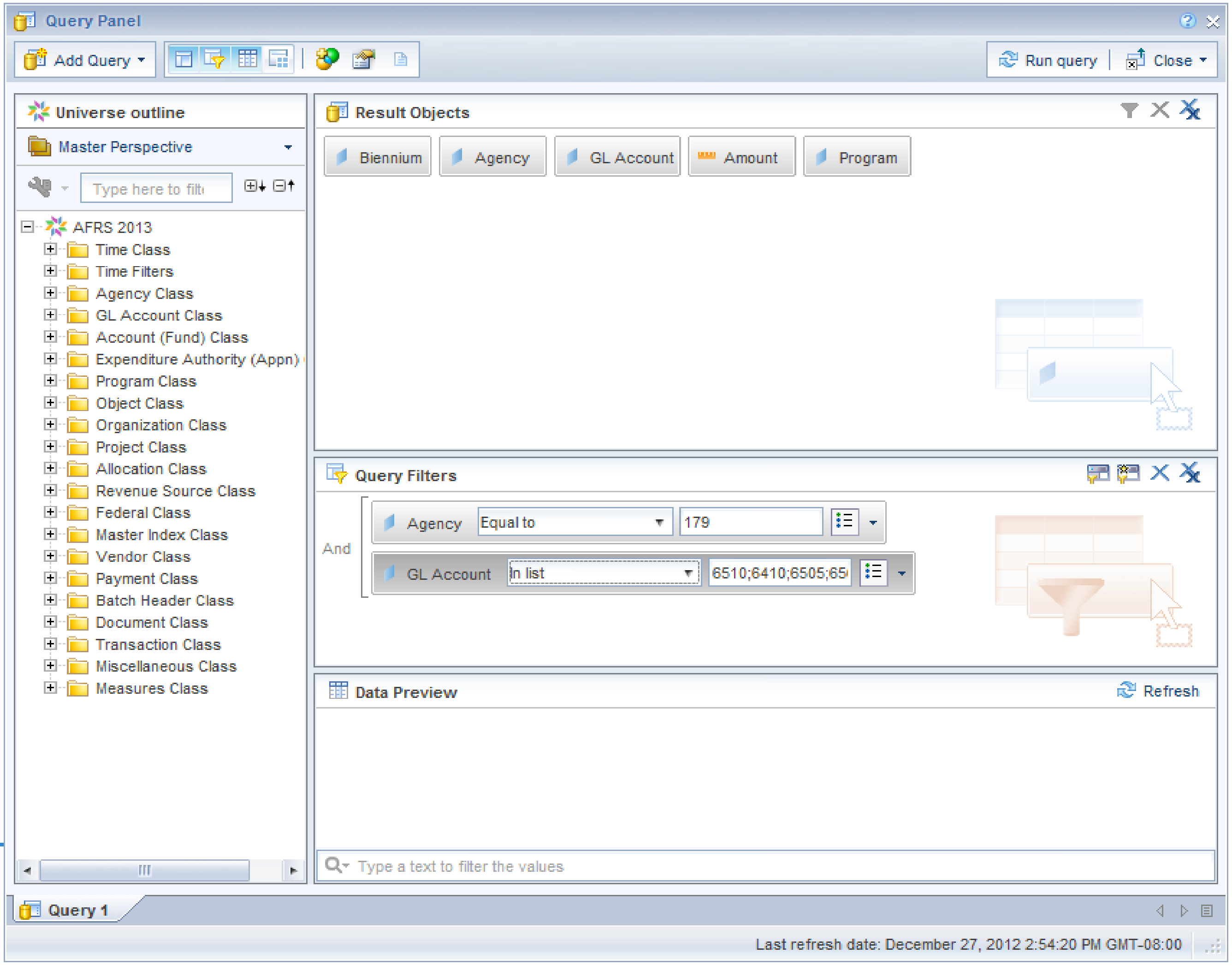
Values from list

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



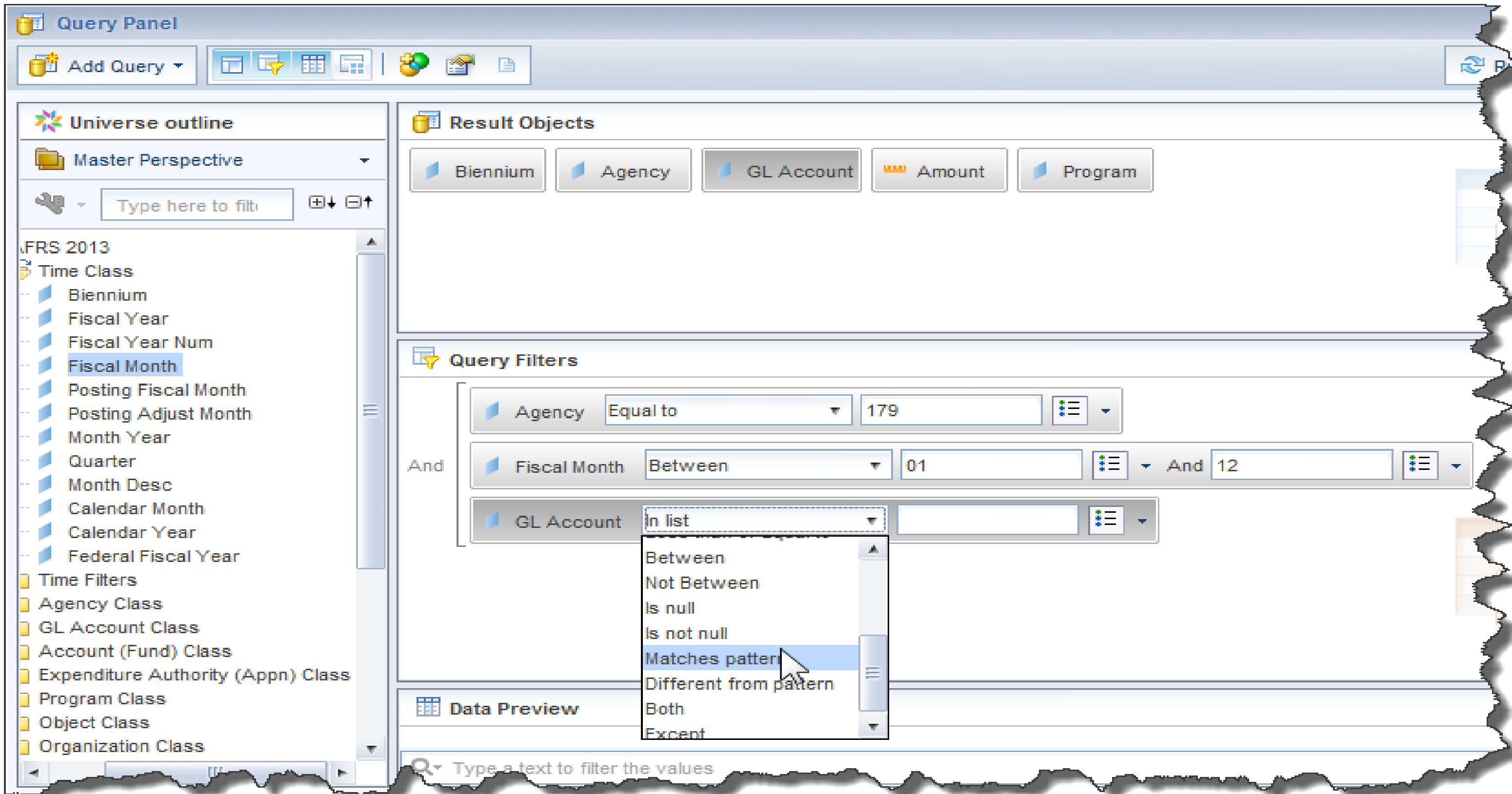
Matches Pattern

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.

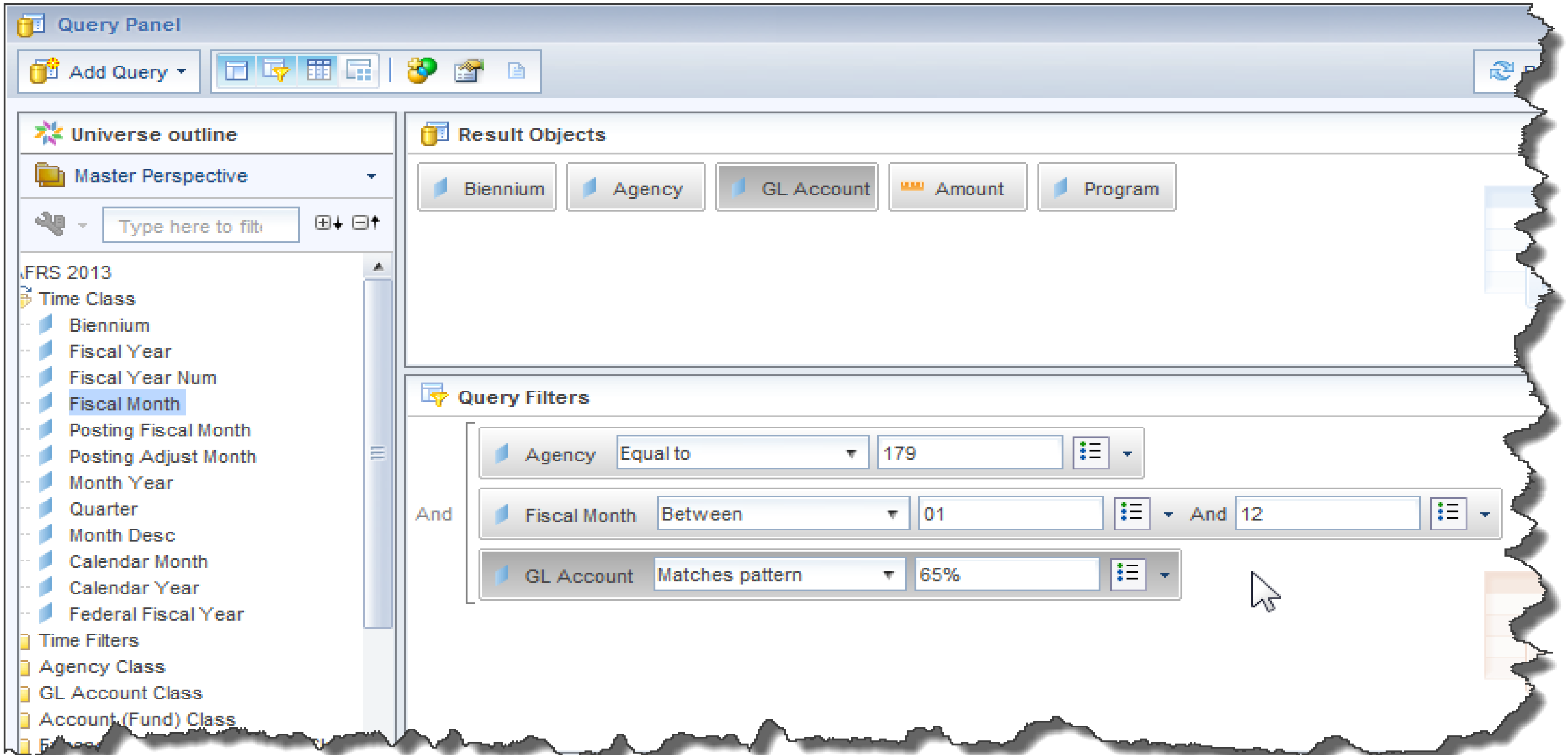
Matches Pattern

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.



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.



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Operators

Operator	Retrieves Data	Example
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

Operators

Operator	Retrieves Data	Example
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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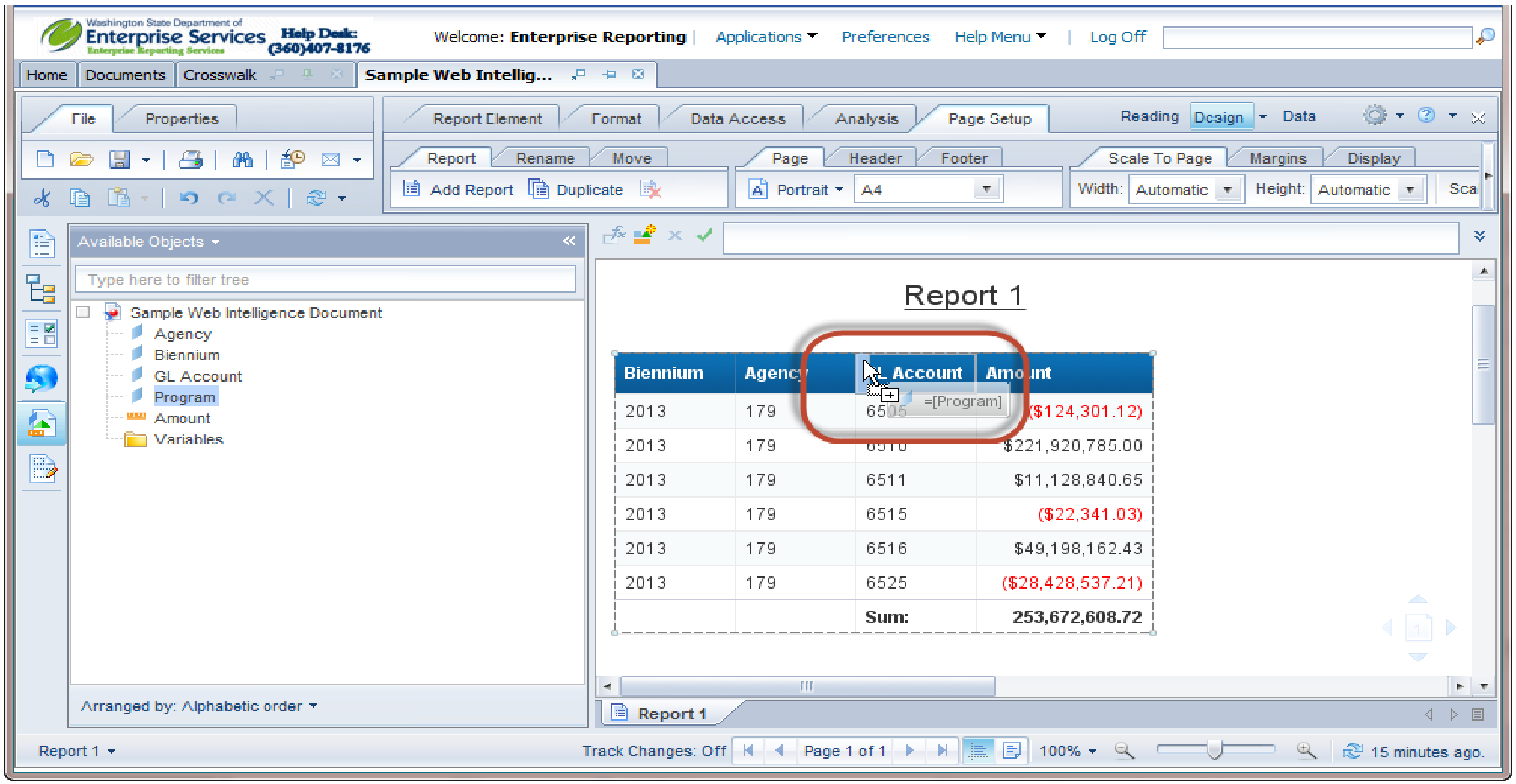
Add Columns

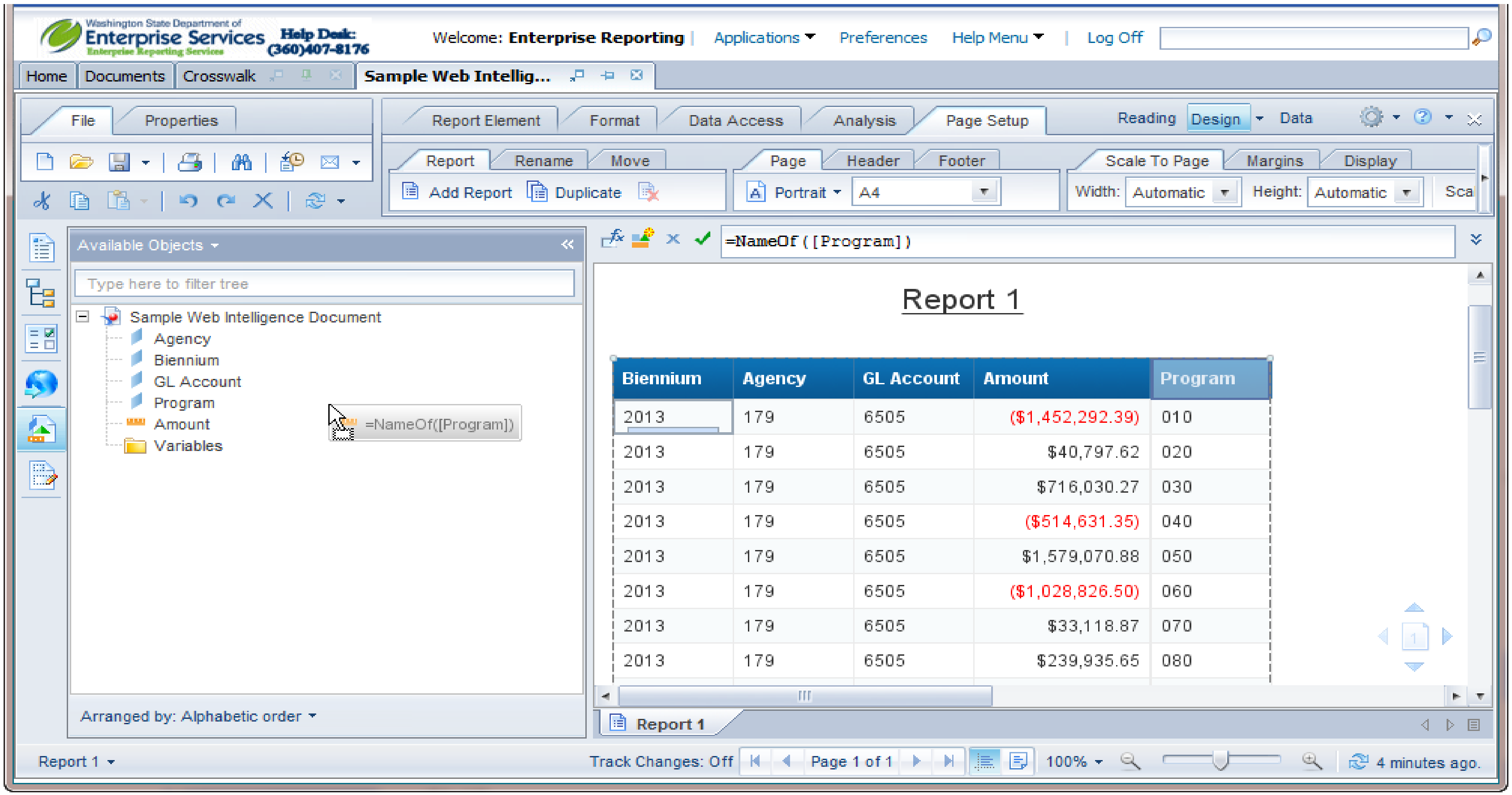
To add Column – Click and drag the object to the report table where it needs to be added. Overlap it with the edge of the cell next to it. Drop the object in the desired spot.



Remove Columns

To Remove a column –

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



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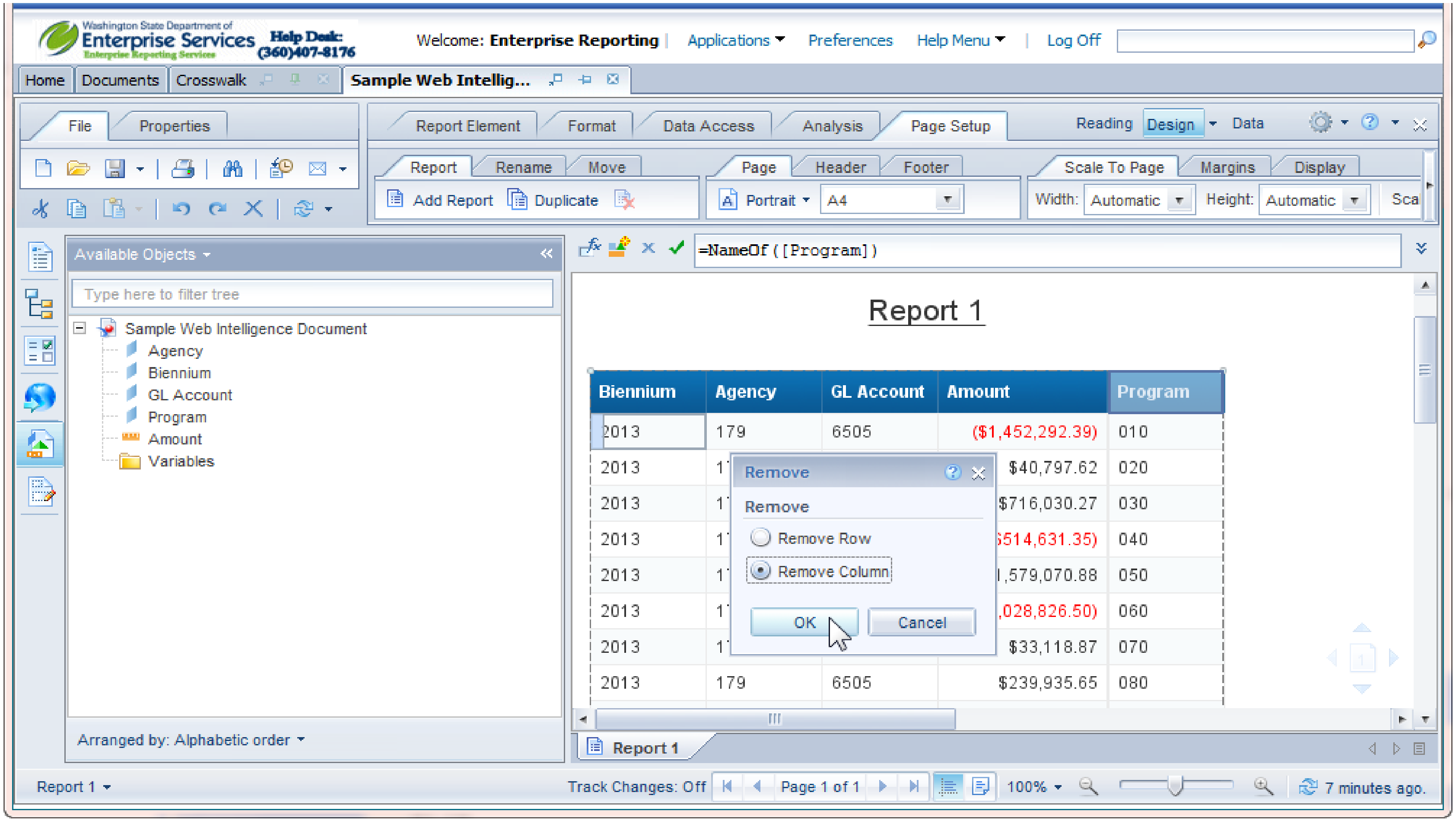
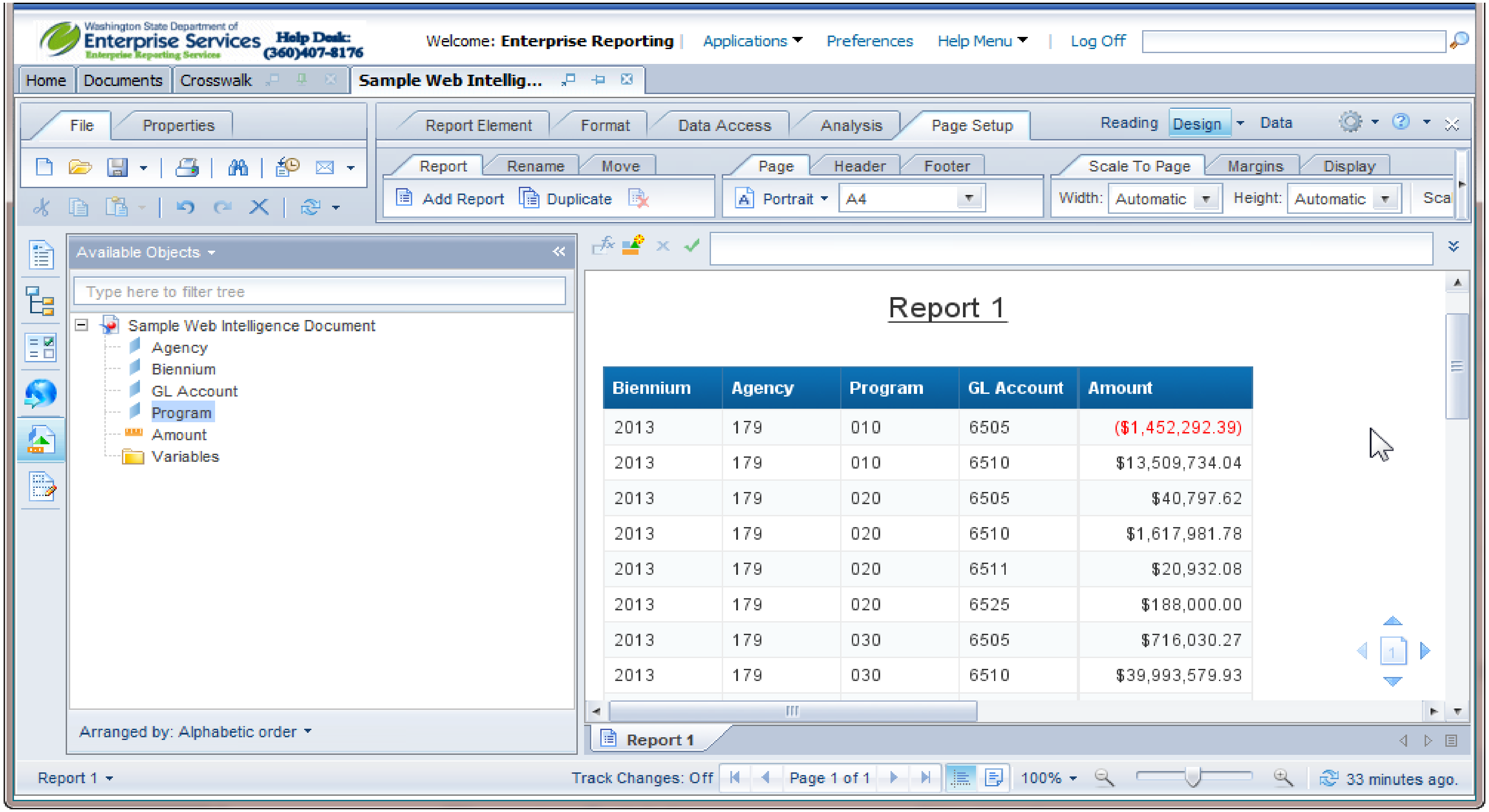
Remove Columns

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



Add / Remove Columns

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



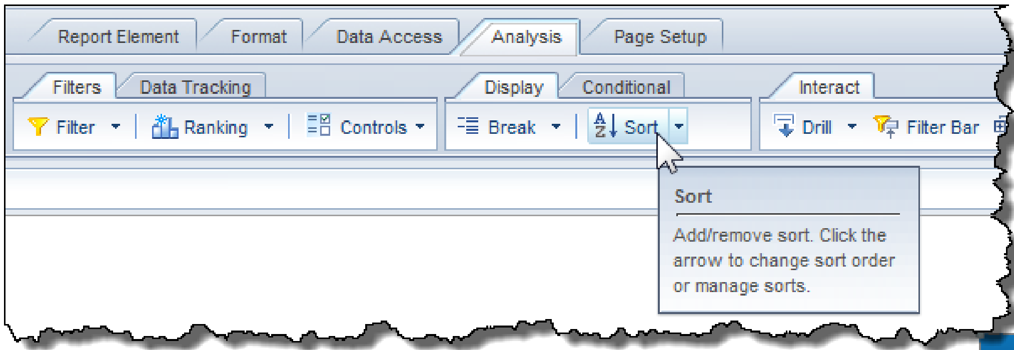
Sorting

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

2. 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

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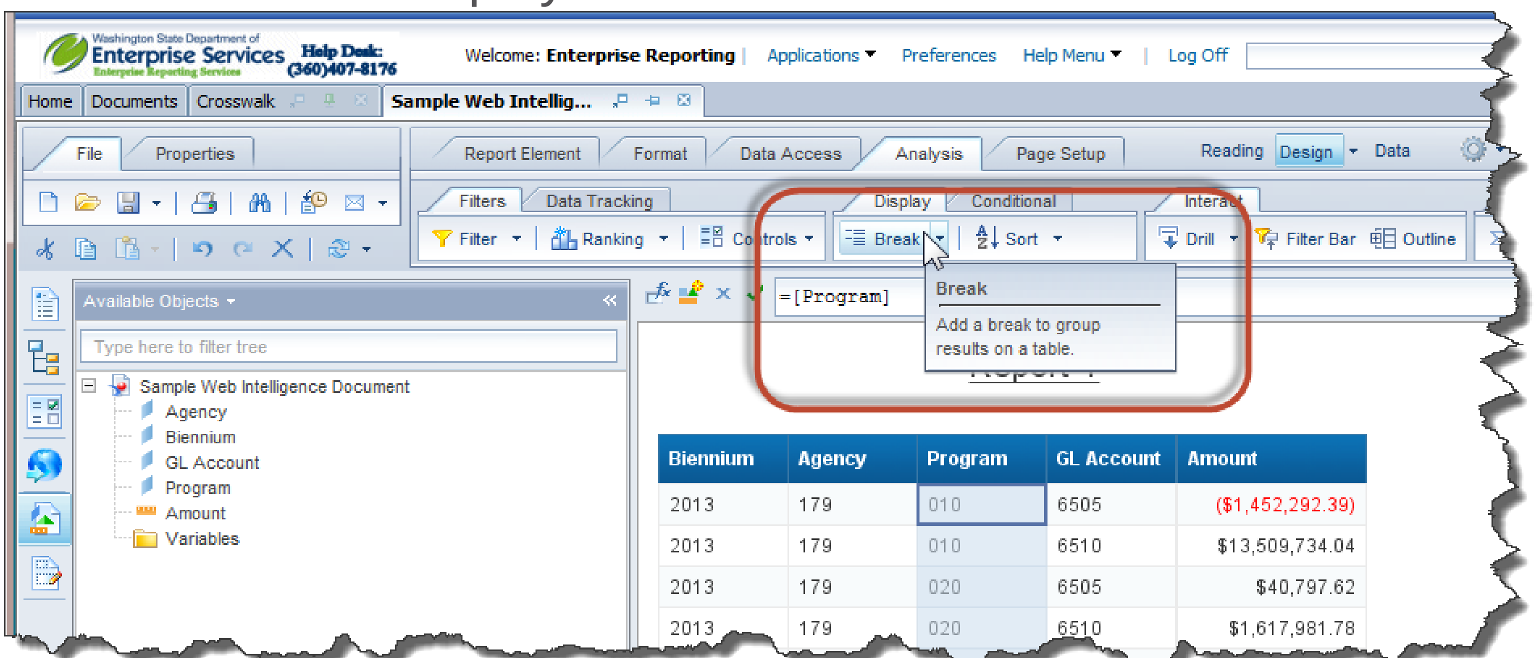
Breaks

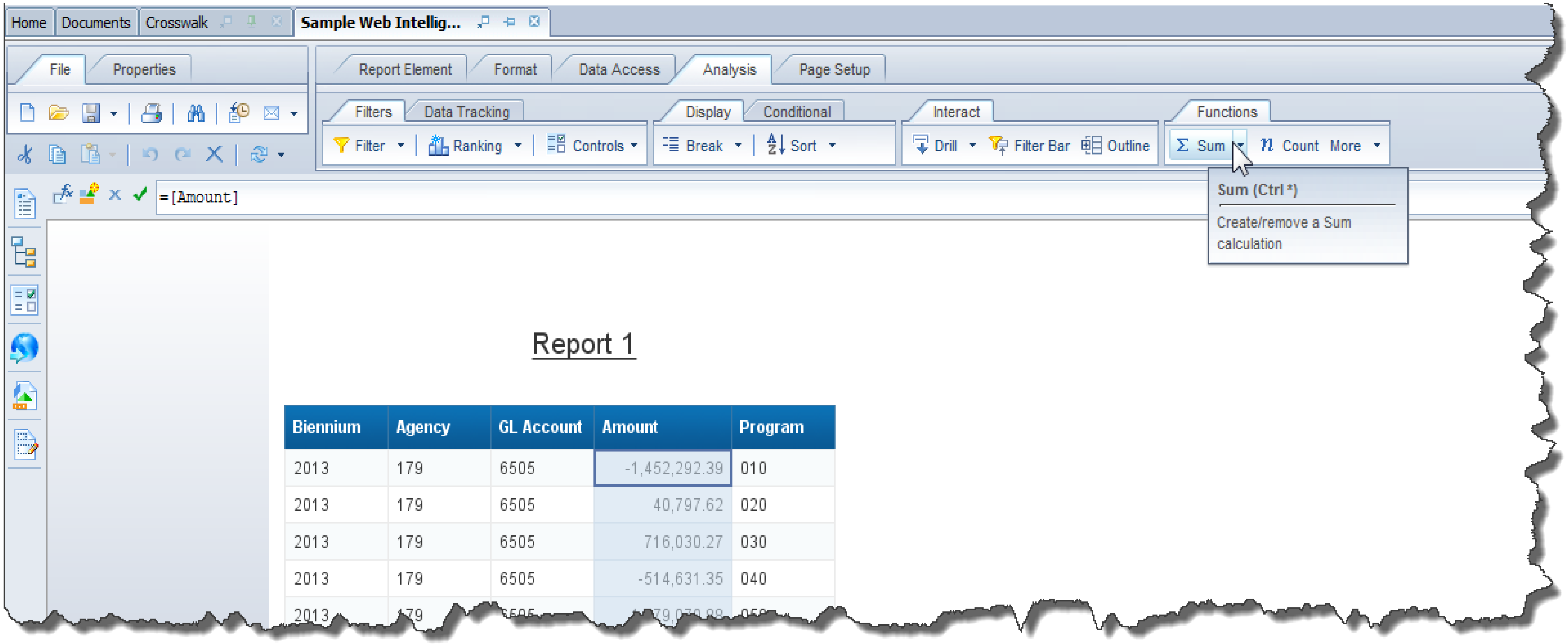
A break divides a large table into smaller sub-tables based on the selected value. Using a break, you can display subtotals by the specified value, as well as a grand total for all values.

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.



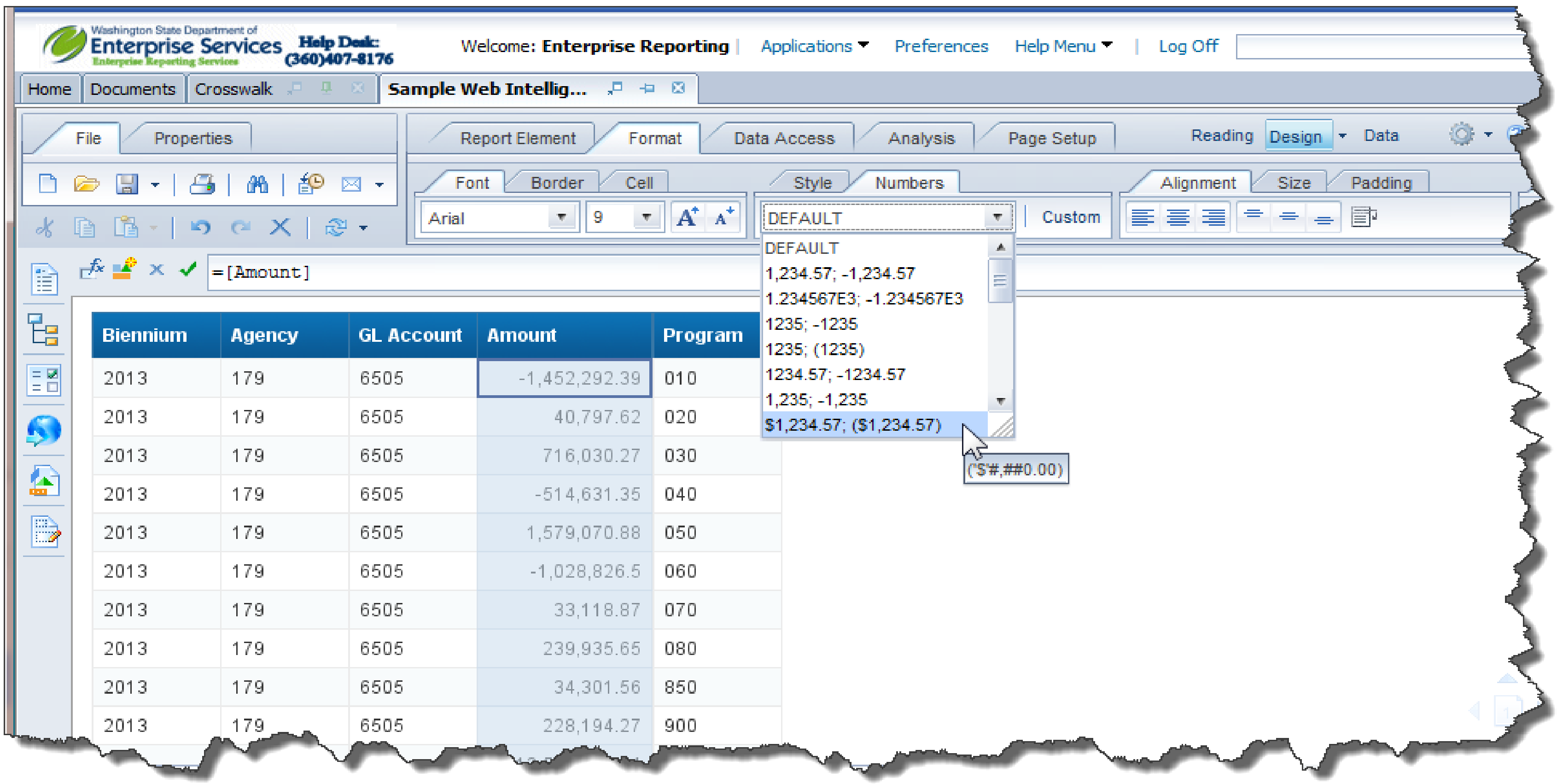
Simple Calculations – Sum

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.



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.



Chapter 7

Printing and Exporting Reports

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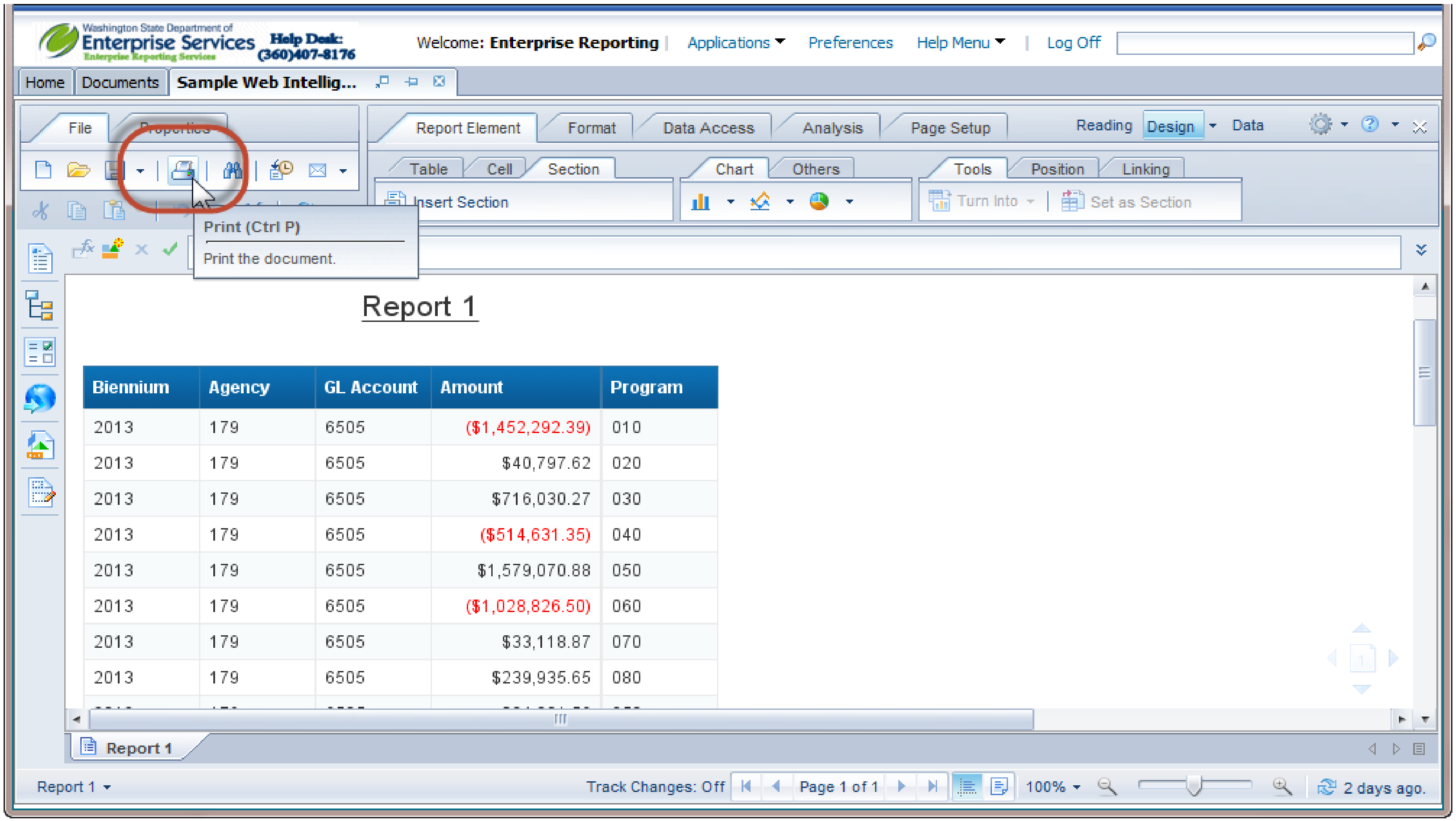
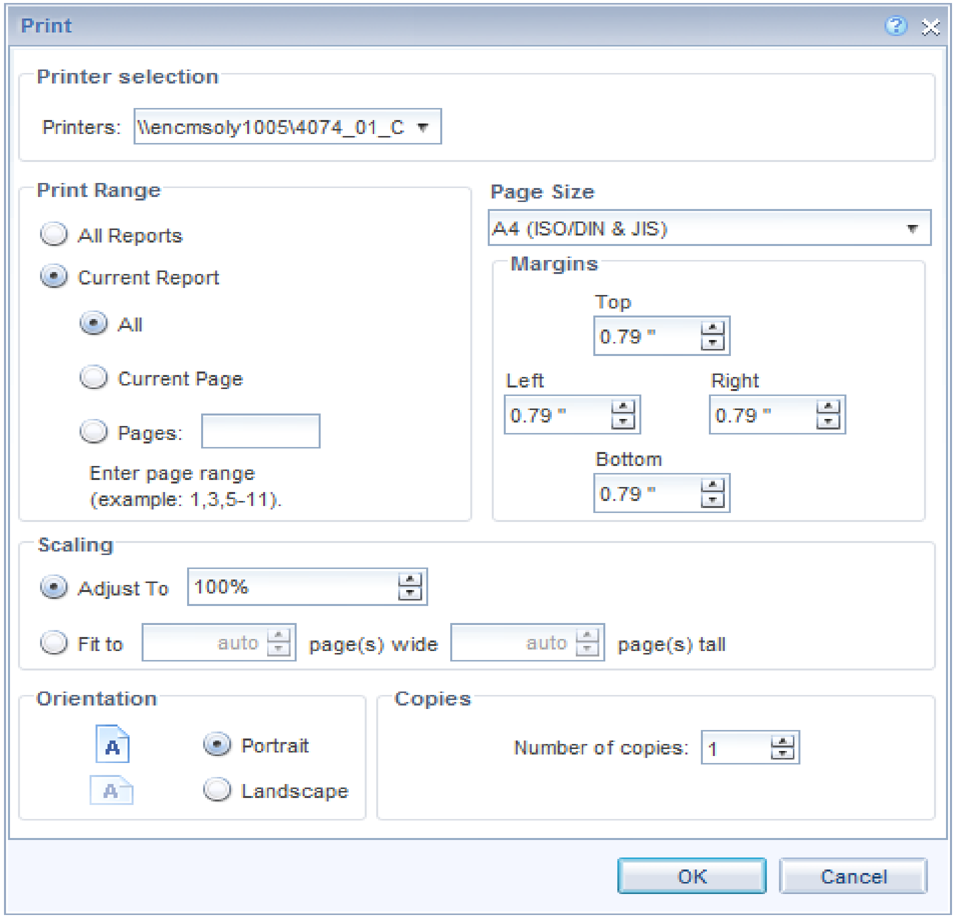
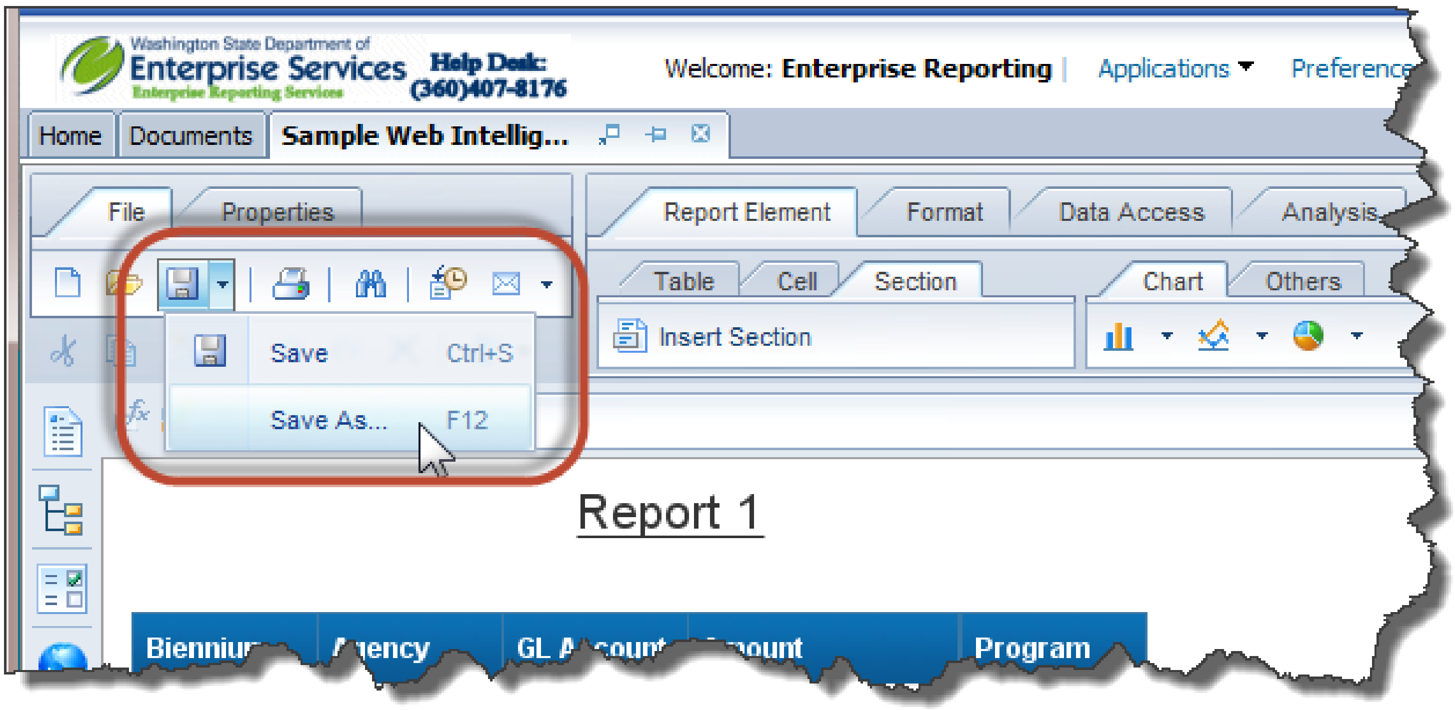
Reports can be printed by clicking on the **Print** icon located on the **File** tab.



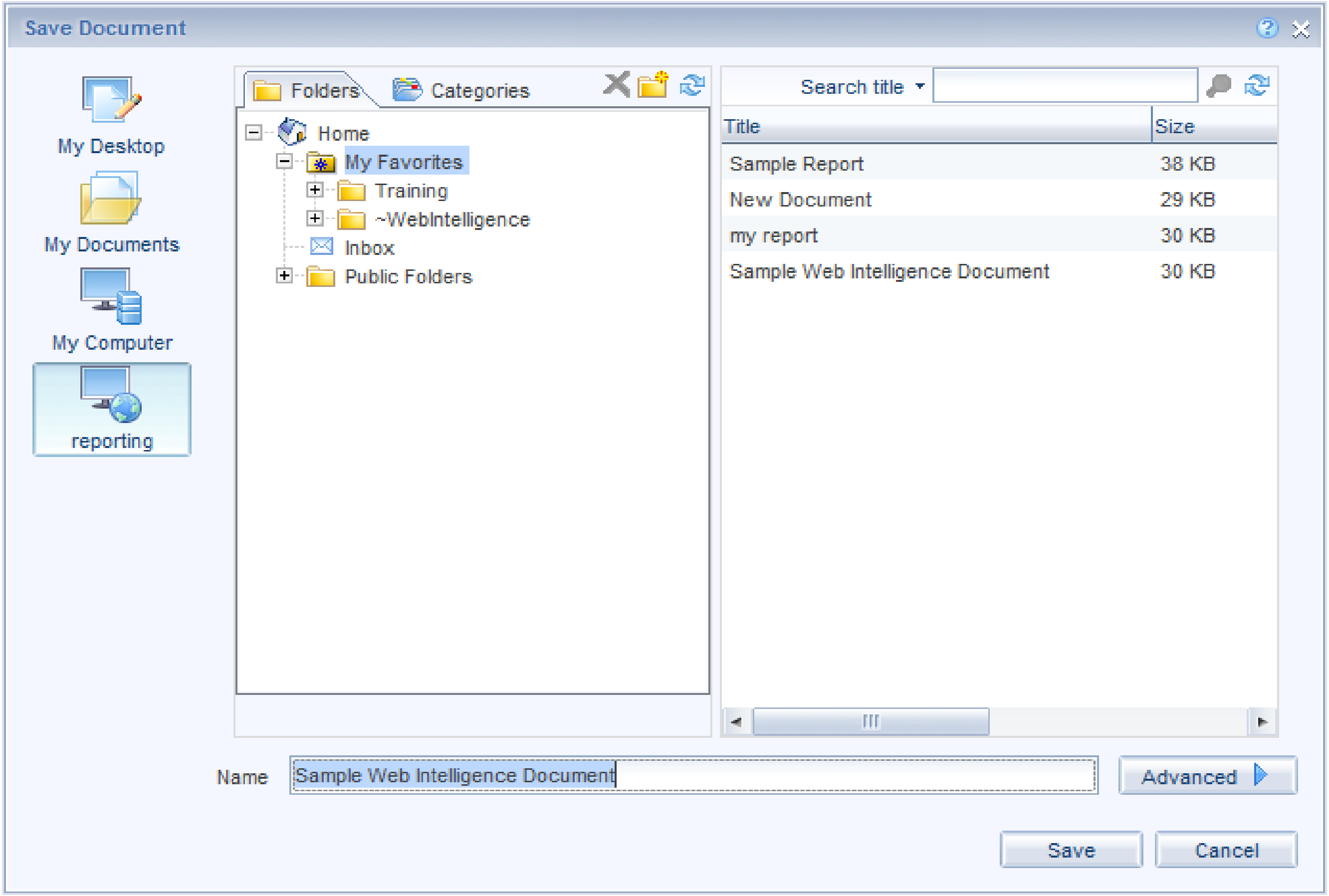
When the **Print** icon clicked the **Print** dialogue box displays. Set the print options and click **OK.**



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

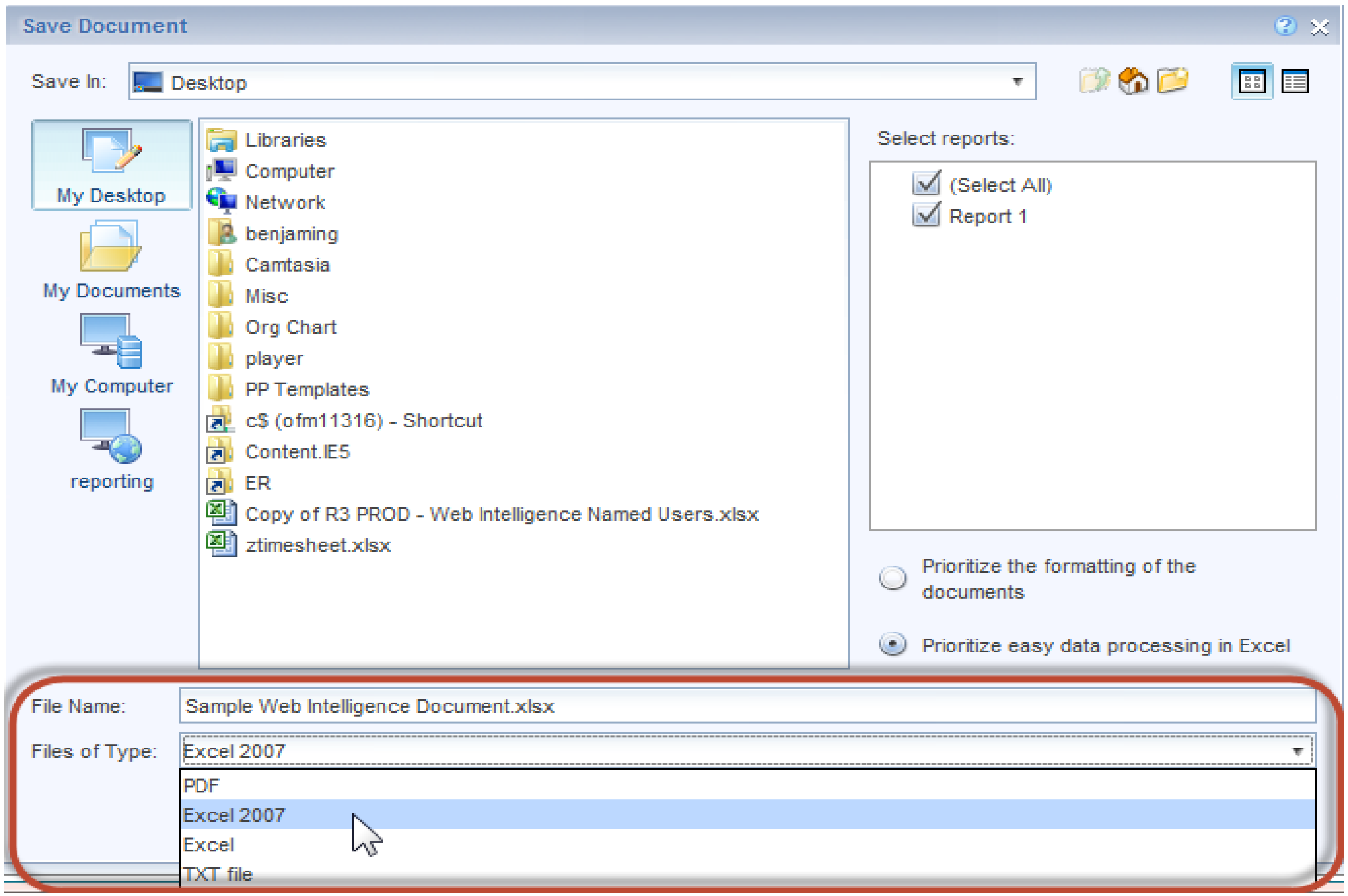


2. When **Save as** is clicked the **Save** dialogue box displays. Select **My Desktop**, **My Documents**, or **My Computer** as the location.

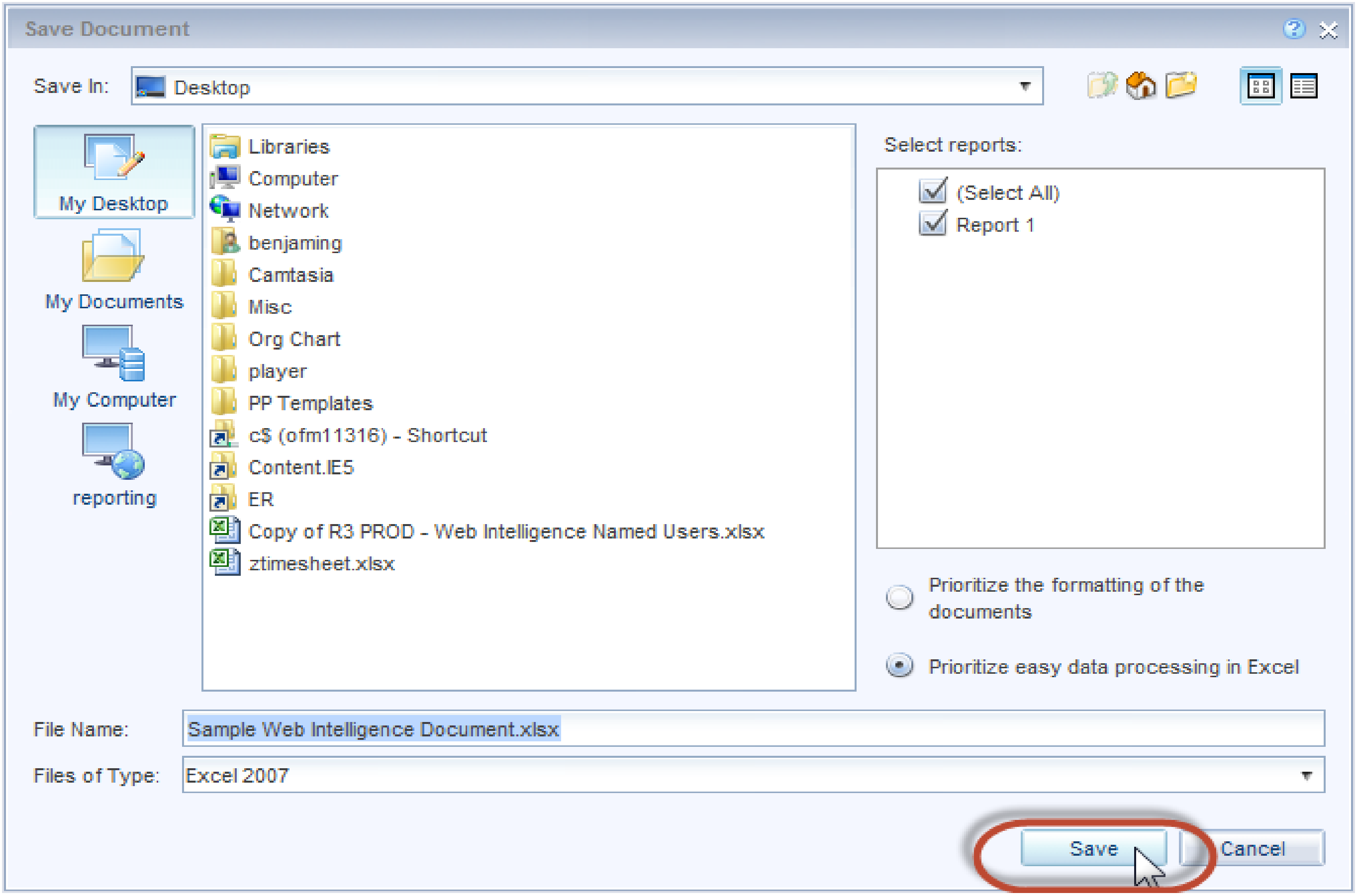


Exporting Reports

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



5. Click **Save.**


Save Document
Save In:
Desktop
My Desktop
My Documents
My Computer
reporting
Libraries
Computer
Network
benjaming
Camtasia
Misc
Org Chart
player
PP Templates
c$ (ofm11316) - Shortcut
Content.IE5
ER
Copy of R3 PROD - Web Intelligence Named Users.xlsx
ztimesheet.xlsx
Select reports:
(Select All)
Report 1
Prioritize the formatting of the documents
Prioritize easy data processing in Excel
File Name:
Sample Web Intelligence Document.xlsx
Files of Type:
Excel 2007
Save
Cancel

Chapter 8

Viewing and Scheduling Reports

WaTech
Washington Technology Solutions
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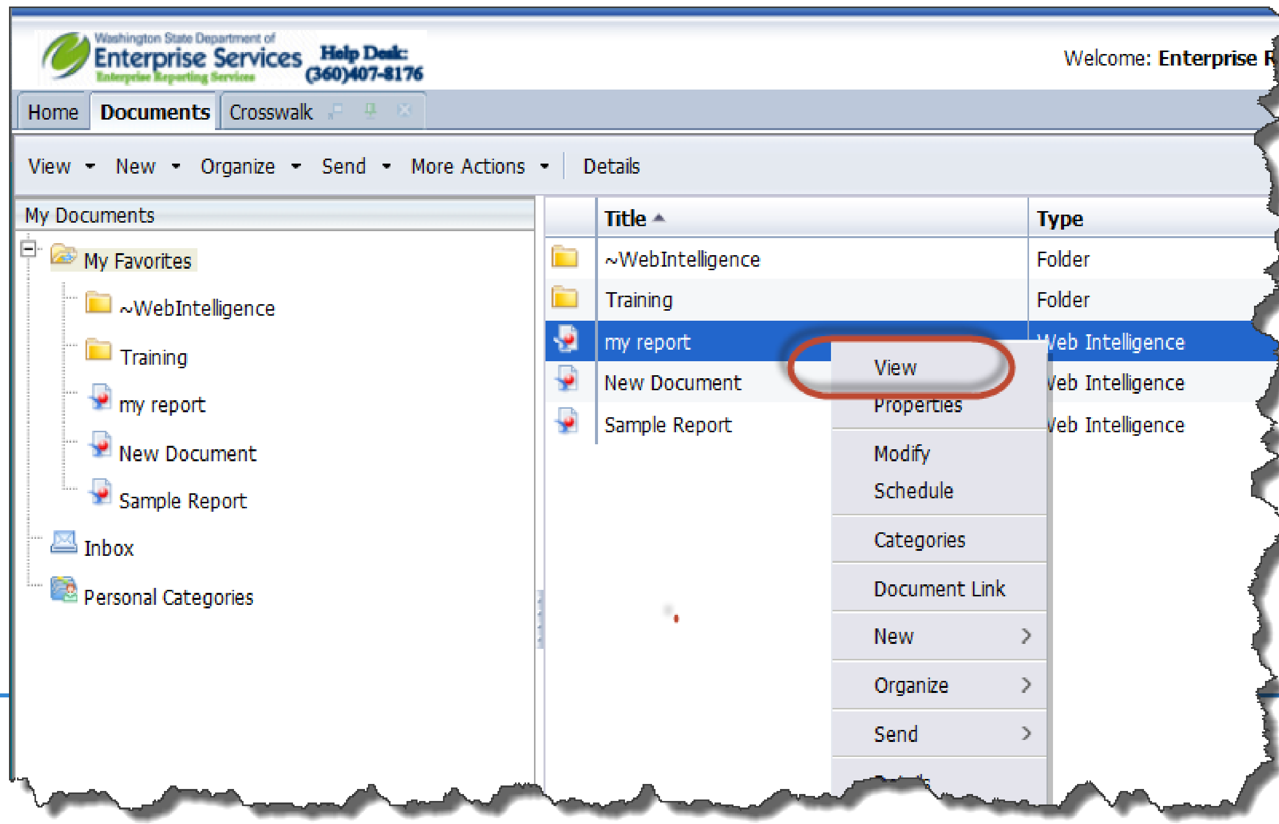
Viewing Existing Documents

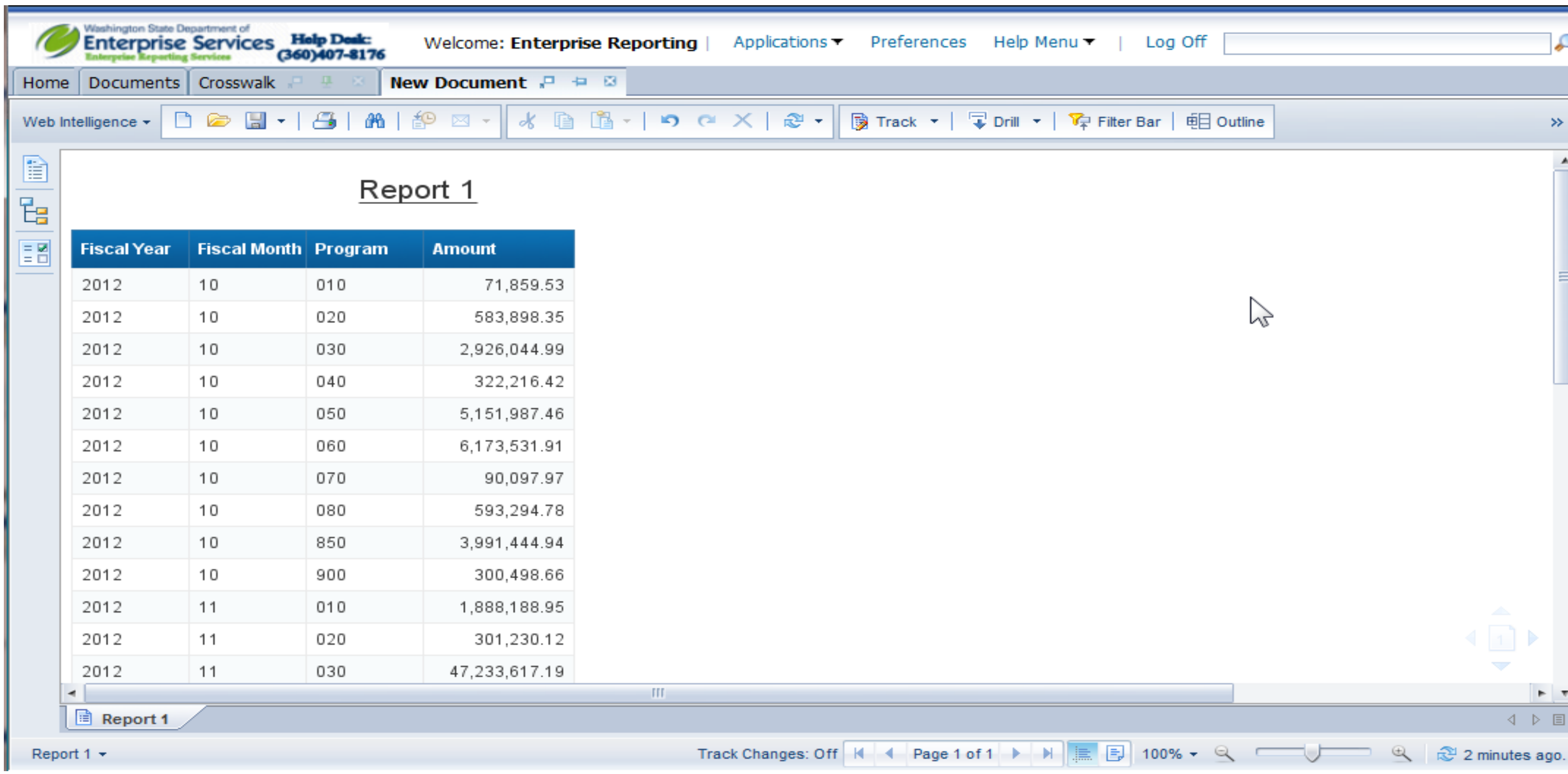
The BI Launch Pad allows for the viewing of existing Web Intelligence Reports. To view an existing Web Intelligence Report:

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”.



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.

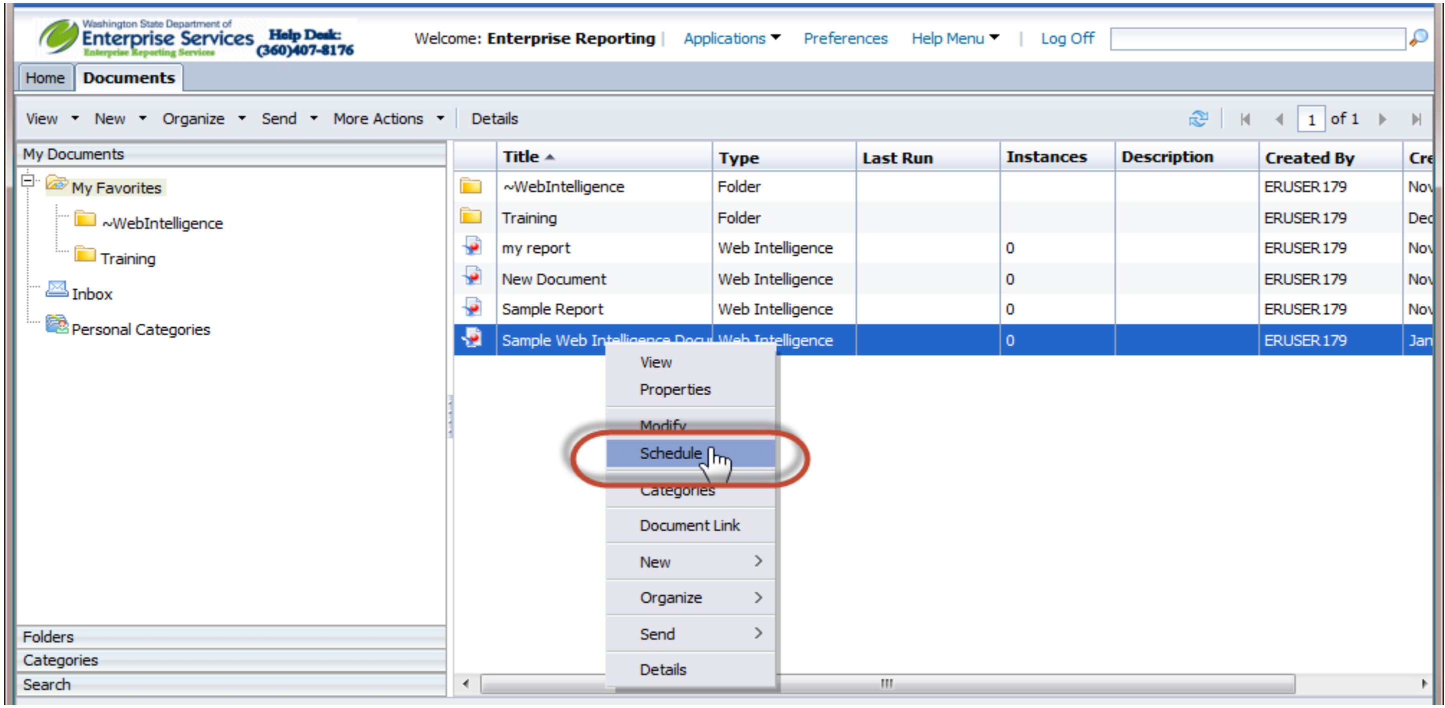


Fiscal Year	Fiscal Month	Program	Amount
2012	10	010	71,859.53
2012	10	020	583,898.35
2012	10	030	2,926,044.99
2012	10	040	322,216.42
2012	10	050	5,151,987.46
2012	10	060	6,173,531.91
2012	10	070	90,097.97
2012	10	080	593,294.78
2012	10	850	3,991,444.94
2012	10	900	300,498.66
2012	11	010	1,888,188.95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

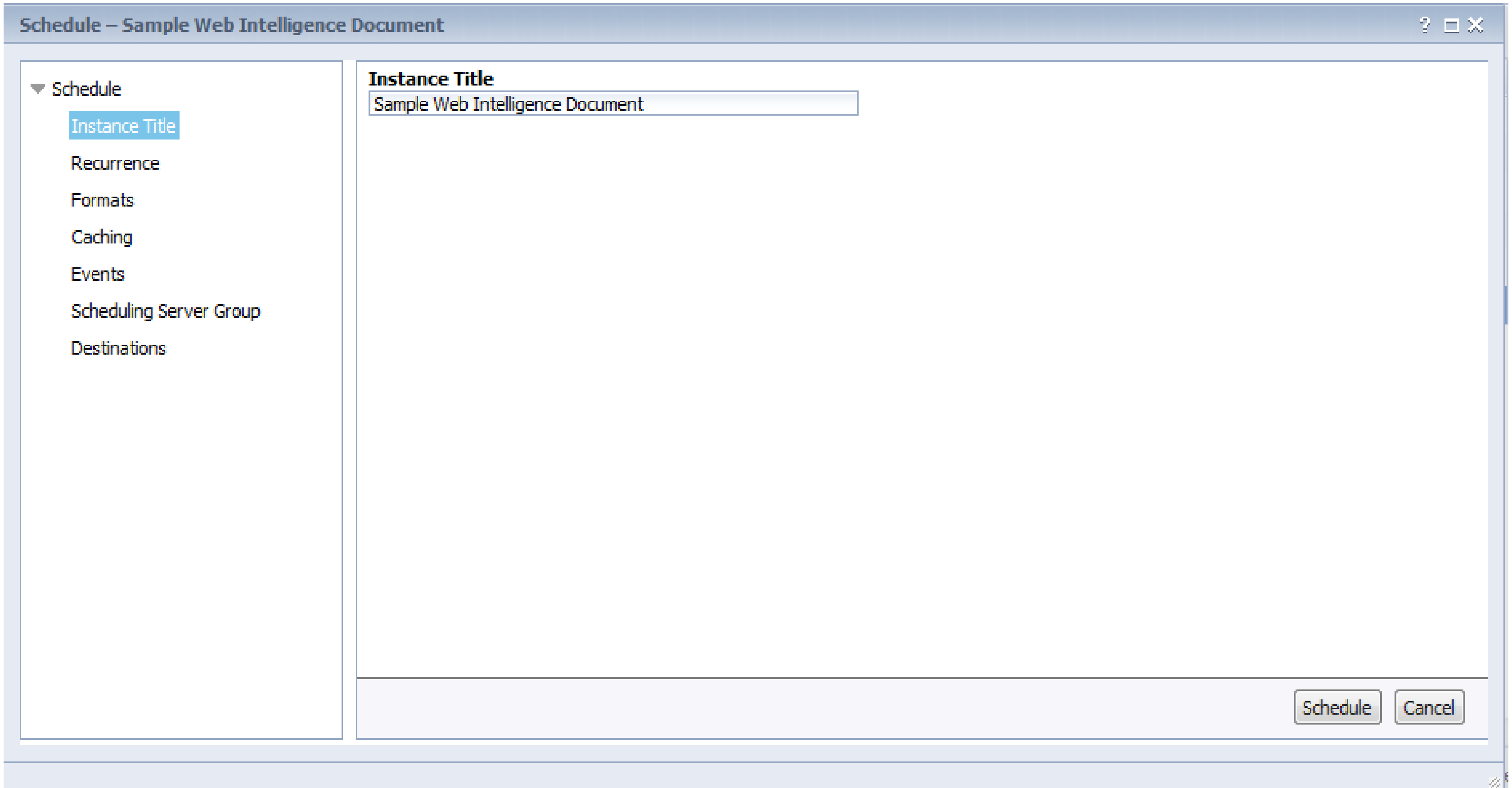
Scheduling Reports

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”



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.

• **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.

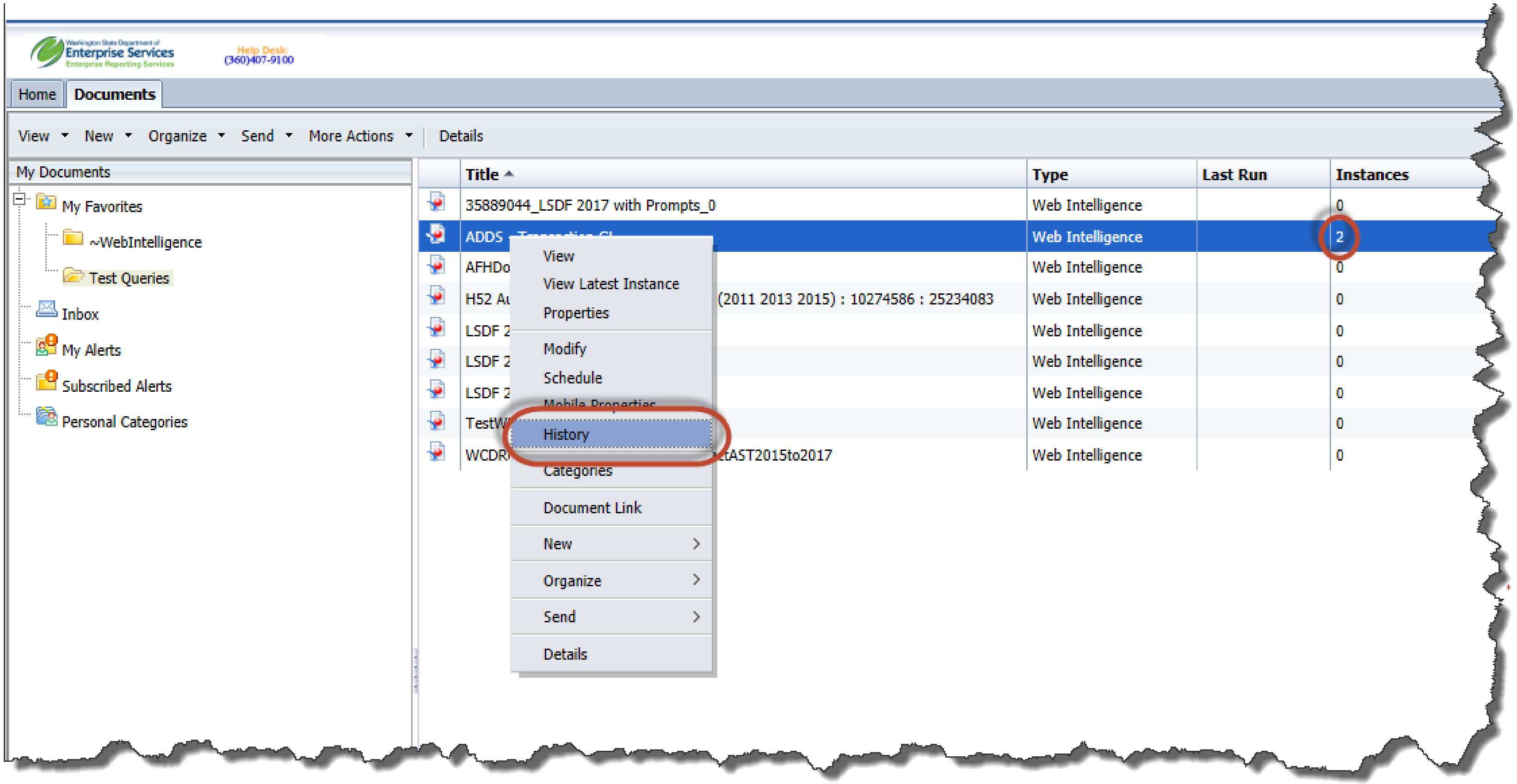
You can schedule to the following destination locations:

- **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

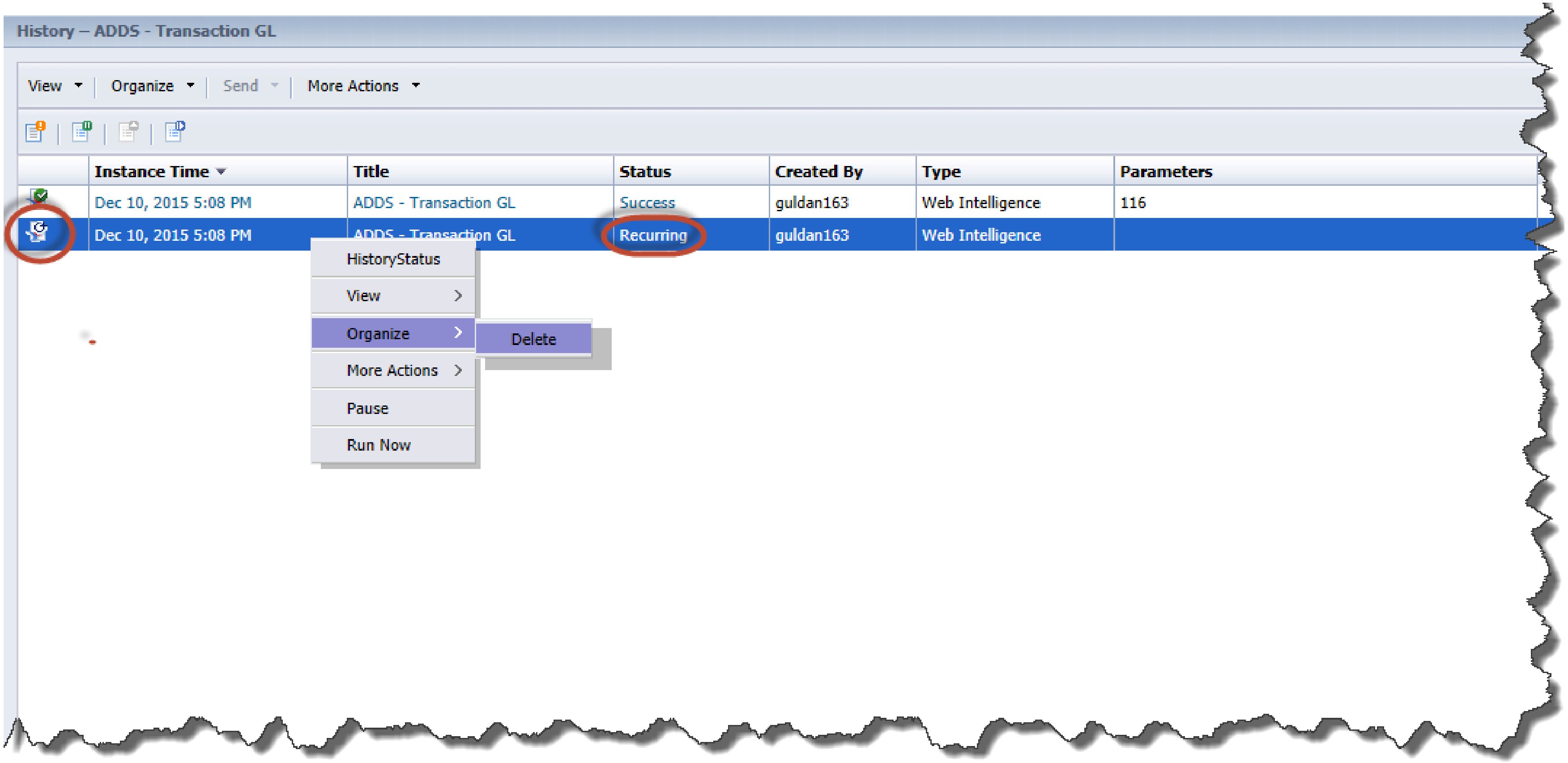
1. Locate the Report History by right clicking on the reports which shows active instances
2. Select History



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

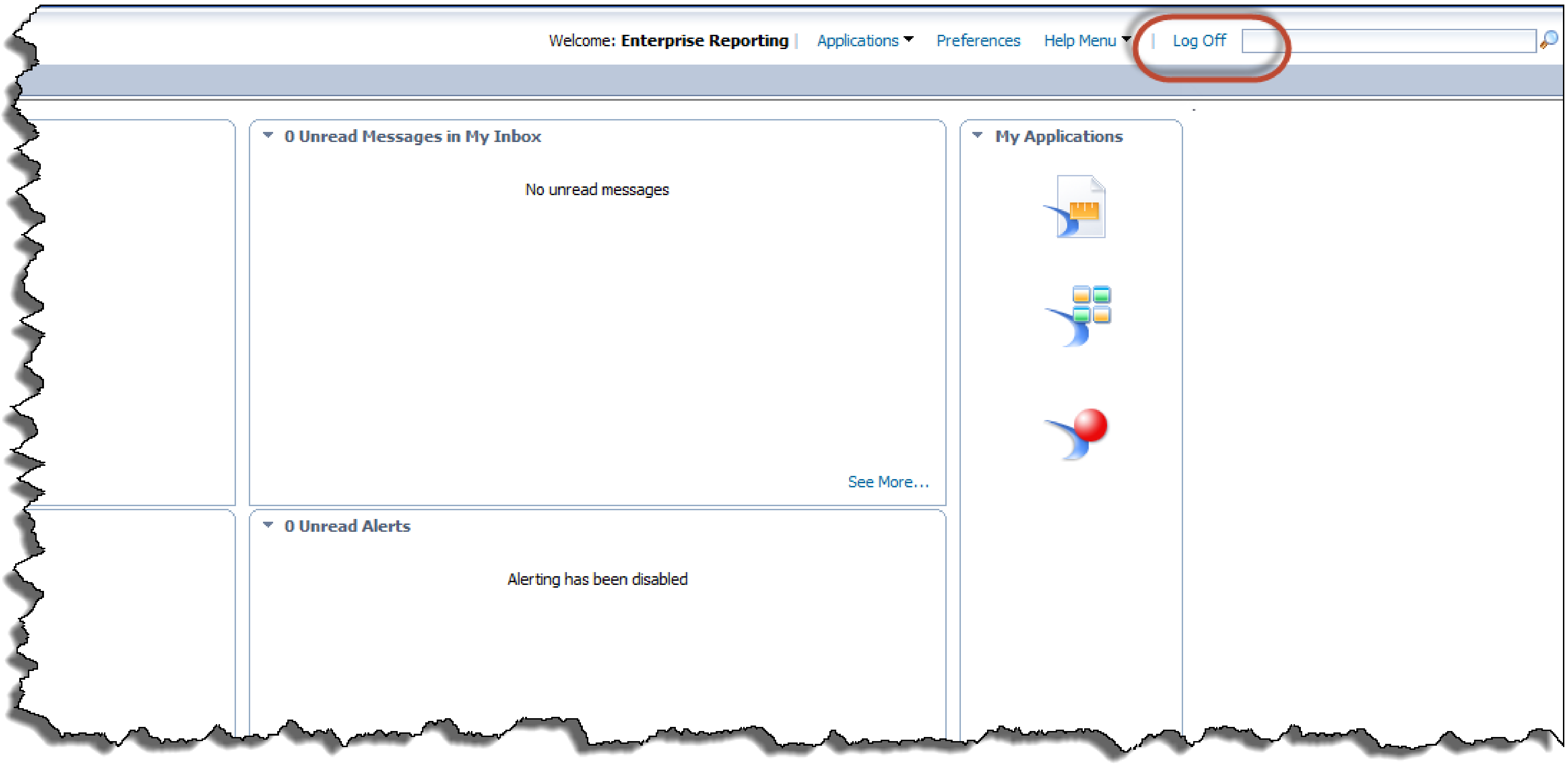
4. Select Organize and then Delete



Questions

Log Off

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



Additional Resources

SAP Business Objects Web Intelligence Product Tutorials

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