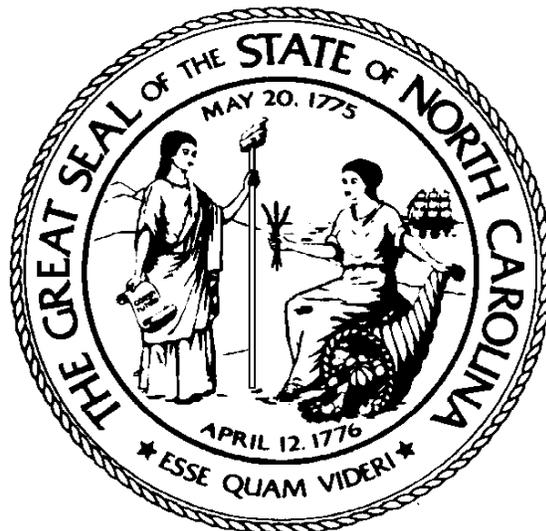


BOBJ410

Business Objects Reporting

TRAINING COURSE



State of North Carolina

Office of the State Controller

Updated: March 1, 2016

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Introduction

Introduction

Lesson 1: Business Objects Definitions and Launch Pad

Lesson 2: Dashboard Reports

Lesson 3: Crystal Reports

Lesson 4: Web Intelligence - Reading Mode

Lesson 5: Web Intelligence - Design Mode

Lesson 6: Course Review

Definitions and Launch Pad

Welcome to the Business Objects, also known as BOBJ, training course. BOBJ is a suite of front-end applications from SAP that allow business users to view, sort and analyze business intelligence data.

This BOBJ410 student guide includes the required materials for all Business Objects courses including the 4 online video prerequisites as well as for the instructor led class.

BOBJ200 Definition and Launch Pad

BOBJ210 Dashboard

BOBJ220 Crystal

BOBJ230 WEBI Read

BOBJ410 WEBI Design

The course introduction for the BOBJ410 ILT class is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bold and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Business Objects Definitions and Launch Pad
- Lesson 2: Dashboard Reports
- Lesson 3: Crystal Reports
- Lesson 4: Web Intelligence - Reading Mode
- Lesson 5: Web Intelligence - Design Mode
- Lesson 6: Course Review

Course Objectives

Upon completion of this course, you should be able to:

- Understand the definition of Business Objects
- Understand the definition of Launch Pad and the components
- Understand the definition and view Dashboard Reports
- Understand the definition and view Crystal Reports
- Understand the definition Web Intelligence Reports
- Open a WEBI report and change to design mode to analyze and explore data
- Add columns and Variables to WEBI Reports
- Add Tables and Charts to WEBI Reports
- Save a WEBI report to My Favorites Folder for future access

Reference Materials

- BOBJ Information Website:

To better assist our BOBJ community of users, we have added an area to the BEST Shared Services website that will make it easy to find out the latest information on BOBJ and what is going on. To access the web location, you will click on Support Materials from the BEST homepage. Once you select the Support Materials link, you will see a link under More Information called [BOBJ](#). You will click on this link to open the BOBJ area of the website.

- BOBJ Student Guide - This link will link you to the location of the course manual for the BOBJ training - the original source for this link is the OSC Training website.
- Communications - This link contains all communications that are sent out to the BOBJ users announcing upcoming report migrations and news of interest pertaining to BOBJ.
- System Status - This link will be used to announce report migrations and data load issues. The system status page should be checked if you are experiencing any problems or issues with the BOBJ reports or access to see if it is a known issue before contacting BEST to record an incident ticket.
- Training Help - This link will take you to the BEACON HELP location that contains job aids, report descriptions, etc.
 - * Job Aids
 - * Known Issues
 - * Reference Documents
 - * Report Descriptions
- What's New - This link is used to notify you of any changes that have made been to BOBJ materials such as Job Aids, Report Descriptions, BI Report Migration Matrix etc.

- Other Resources
 - _Help Folder within Business Objects Reporting Tools

SUMMARY

- This course is intended to give business users an understanding of the Business Objects reporting tool. It will provide you with explanations and demonstrations of the Business Objects navigation and functionality.

BOBJ200 - Business Object Definitions and Launch Pad

Introduction

Lesson 1: Business Objects Definitions and Launch Pad

Lesson 2: Dashboard Reports

Lesson 3: Crystal Reports

Lesson 4: Web Intelligence - Reading Mode

Lesson 5: Web Intelligence - Design Mode

Lesson 6: Course Review

Objectives

- Understand the definition of Business Objects
- Identify the components of the Launch Pad
- Work with the documents in the Launch Pad

What is Business Objects?

Business Objects, also known as BOBJ, is a suite of front-end applications from SAP that allow business users to view, sort and analyze business intelligence data. The business benefit of this course is that users will be able to efficiently and effectively manage personal and business documents to access the information they need, when they need it. Users will be able to design their own reports using Web Intelligence.

Components of BOBJ

There are 4 components of BOBJ.

- **Launch Pad** - a web application that acts as a window to all business information viewed in a single location.
- **Dashboards** - interactive view that contains charts and graphs for visualizing data.
- **Crystal Reports** - formatted reports with parameter selections for users to run and generate reports.
- **Web Intelligence (WEBI)** - a self-service environment for creating ad hoc queries and analysis of data online. WEBI allows the option of viewing as formatted reports or manipulating and adjusting of reports to meet your business requirements.

Report Icon Designation

There are 3 types of objects in BOBJ and each type has an icon designation associated with it. Shown here are the icons for each type of object.

Dashboard



Dashboard Reports are an easy to read, often single page, user interface, showing a graphical presentation of the current status (snapshot) and historical trends of an organization's key performance indicators to enable instantaneous and informed decisions to be made at a glance.

Crystal Reports



Crystal Reports are a popular Windows-based report writer (report generation program) that allows a programmer to create reports from a variety of data sources with a minimum of written code. Crystal Reports can access data from most widely-used databases and can integrate data from multiple databases within one report using Open Database Connectivity (ODBC).

Web Intelligence (WEBI)



Business Objects Web Intelligence provides an easy-to-use interface with powerful query features that allows your business analysts and nontechnical information consumers to ask spontaneous and iterative business questions of their data.

Tips

- Clear your Internet Explorer browser cache before logging in to Business Objects. For instructions on how to clear the cache, see the BOBJ Job Aid located in the _Help folder or on the [BOBJ Website](#).
- Do not use the wheel between the left and right mouse buttons when scrolling up and down. It may cause Business Objects to lock up.
- Do not use the back arrow  located in the top left corner of your Internet Explorer browser. The Business Objects application will crash.

Accessing Business Objects

It is now time to access Business Objects by logging into the [BEACON Portal](#) using your NCID and Password. Now that you are on the BEACON Portal Home Page, click on the Business Objects tab.

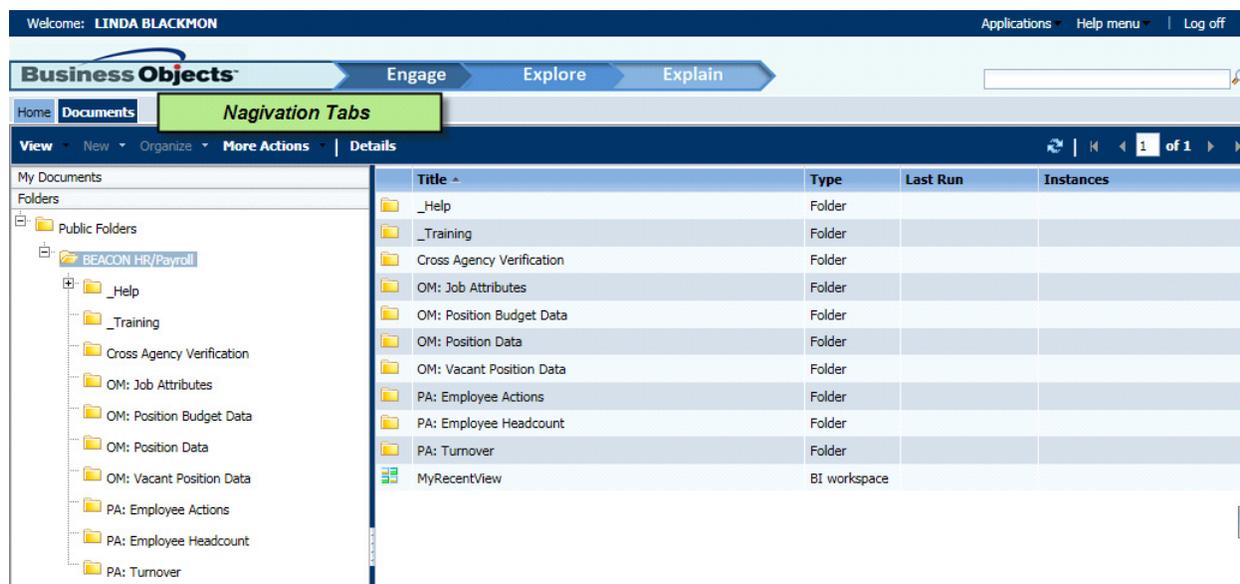


☞ The Business Objects application will time out after 15 minutes of inactivity unlike the BEACON portal which times out in 30 minutes. Even if you are actively working in Business Objects, you will lose connection if the BEACON portal times out. It is very important to click on the SAP tab and then click on 'Continue' when the BEACON portal is timing out.

Launch Pad

Once you log into BEACON and select the Business Objects tab, the Launch Pad will open providing access to the reports and information housed in BOBJ. The data in BOBJ is refreshed overnight for next day access with the exception of quota related data. Quota related data, once migrated to BOBJ, is updated every Wednesday and Saturday nights due to the large volume of data.

The Launch Pad features two main navigation tabs: the Home Tab and the Documents Tab.

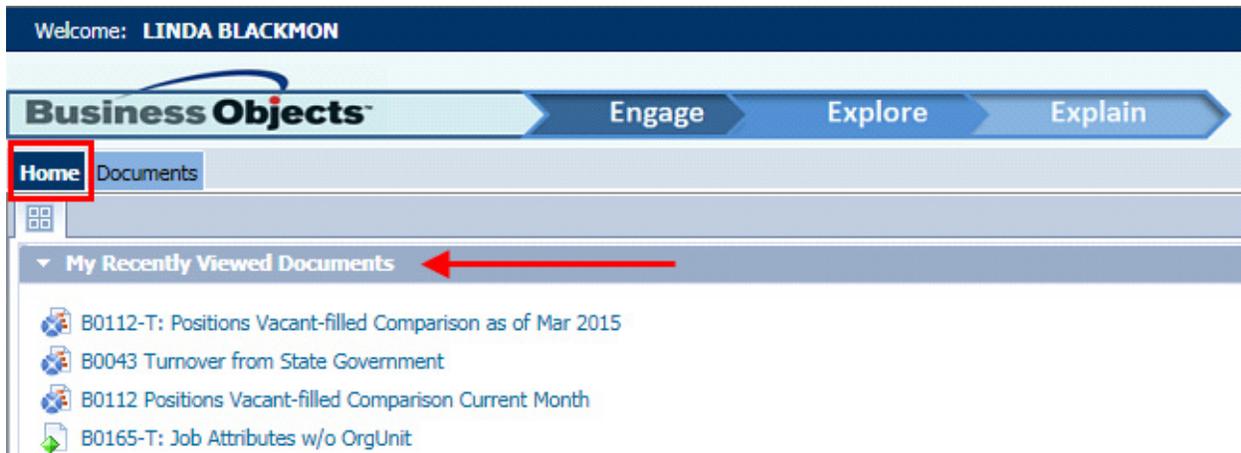


Screen Components of Launch Pad

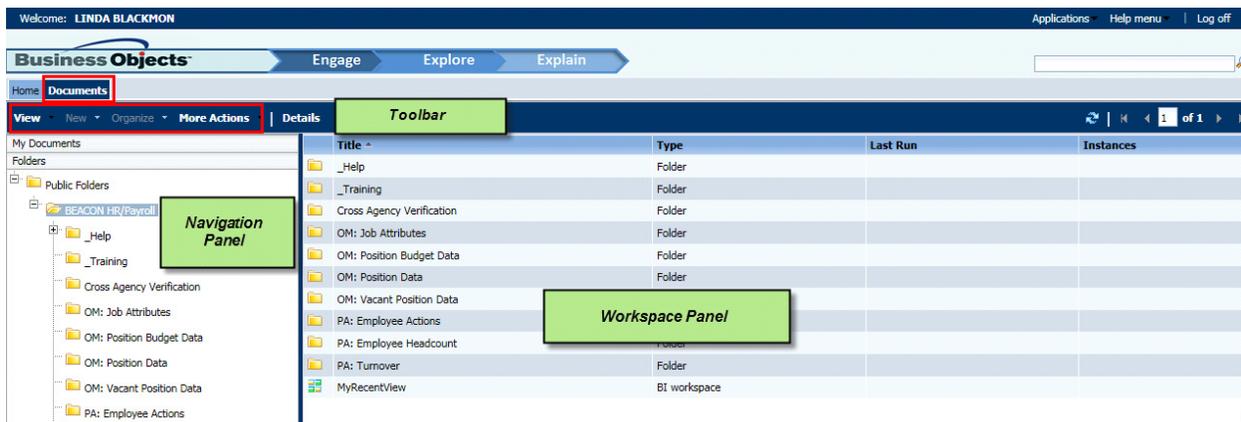
Navigation Tabs

1. **Home Tab** – contains My Recently Viewed Documents. The My Recently Viewed Documents drop down contains links to reflect the last 10 reports or documents that you have viewed in BOBJ. You may quickly access a report or document from the list by double-clicking on it from this view to open it.

 This drop down will be empty the first time it is accessed. It will populate with the last 10 report or document links you have accessed regardless of where the report is located (i.e. Public Folders and My Favorites Folder)



2. **Documents Tab** – provides access to the repository of business intelligence content and provides a left-hand navigation panel. This view is similar to how Windows Explorer works. If you click on a folder in the left navigation panel, the objects stored in the folder will be displayed in the workspace panel. The folders that are displayed within the Public Folders are determined by each user's roles and security authorization. Some of the folders may be empty at this time because not all reports have been migrated to BOBJ



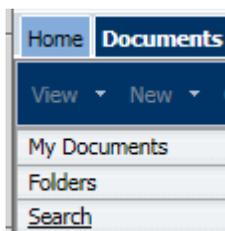
- a. **Toolbar Options on the Documents Tab**
 - ❖ **View**-Use to view selected object, the latest instances of object, and object properties
 - ❖ **New**- Allows you to upload local documents and create folders to the My Documents Drawer/My Favorites folder. Not available for use in the Folders Drawer/Public Folders.
 - ❖ **Organize**-Use to manage selected object shortcuts and to cut, copy, paste, and delete objects
 - ❖ **More Actions**-Use to perform the following task:
 - Document Link - this option is context sensitive depending on your location and action in the system (folder, document, or report).

Navigation Panel

The Navigation Panel provides a top-level view of the folders and the categories in the platform. The panel displays on the left side of the Launch Pad.

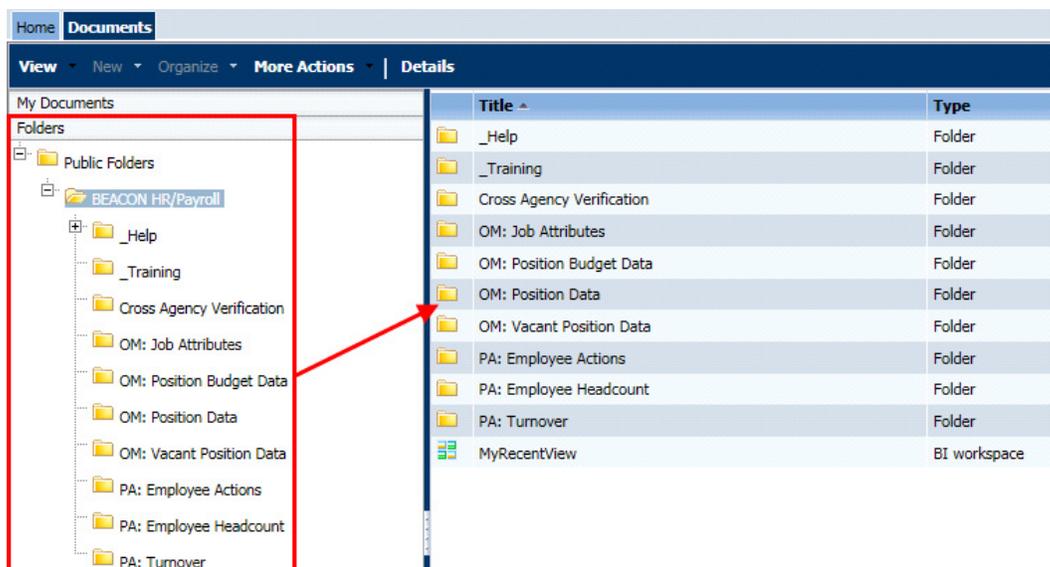
Drawers - expandable panes on the navigation panel which let you switch easily between different views of the repository. The following drawers are available:

- ❖ **My Documents** - Displays the user's My Favorites Folder
- ❖ **Folders** - Displays a folder view of the public repository
- ❖ **Search** - Displays search options and results

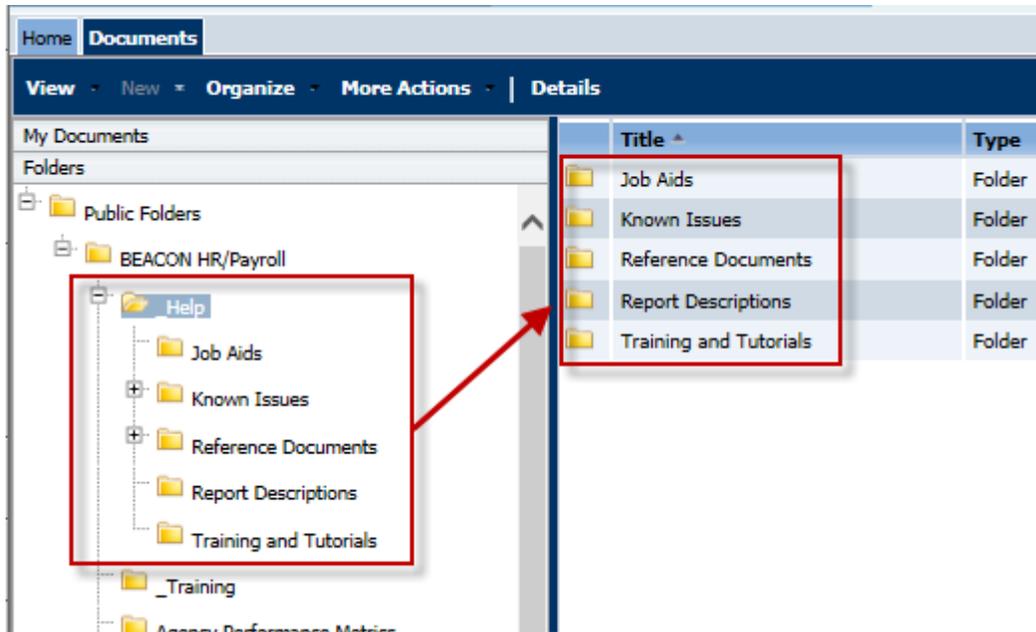


Default View - Folders

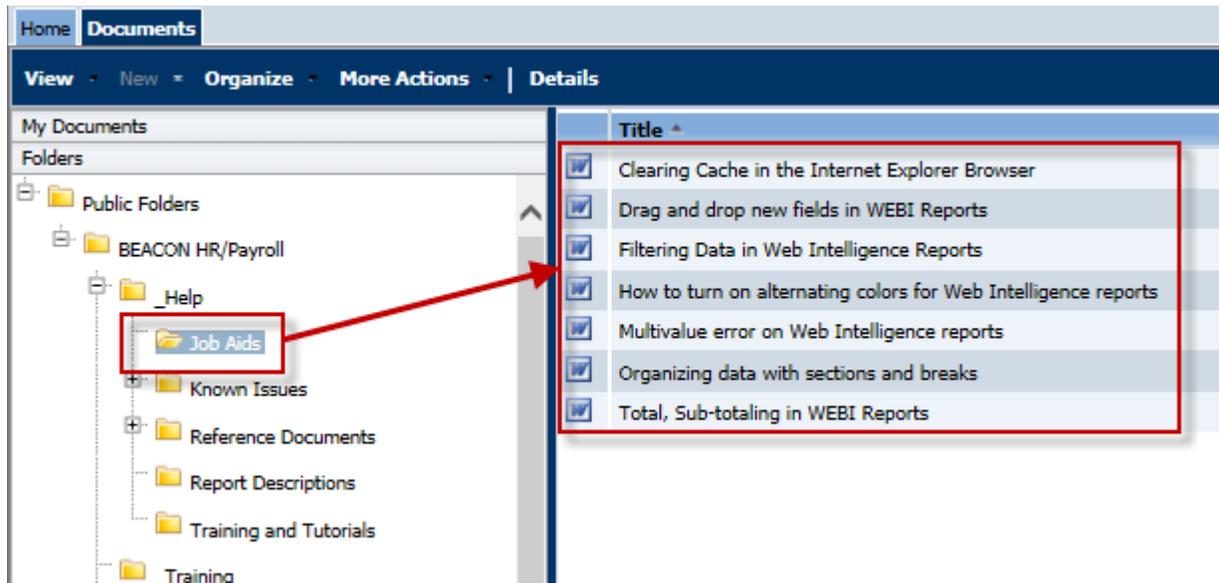
When the Folder drawer is clicked, the Default view shows a list of folders in the left navigation panel and the same folder list in the workspace panel.



Folder View



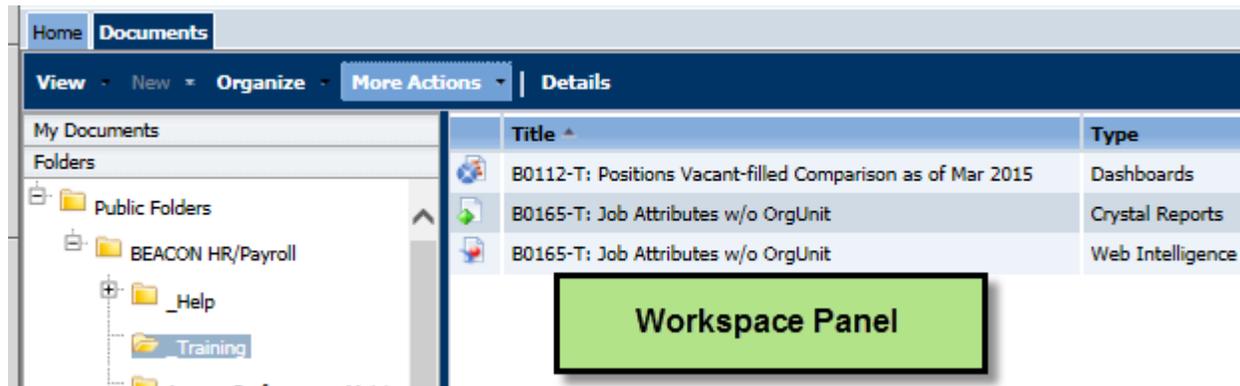
To view subfolders, click the plus sign (+) to the left of the folder name in the navigation panel. Click the minus sign (-) to the left of the expanded top level folder to collapse the folders/subfolders.



-  The folders that are displayed within the Public Folders are determined by each user's roles and security authorization. Some folders may be empty until reports are migrated from Business Intelligence to BOBJ.
-  To resize the Navigation Panel, move the mouse over the left edge of the Workspace Panel until double arrows appear (⇄), right click and drag the edge of the panel to the left or right. When the Navigation Panel is sized appropriately, release the mouse button.

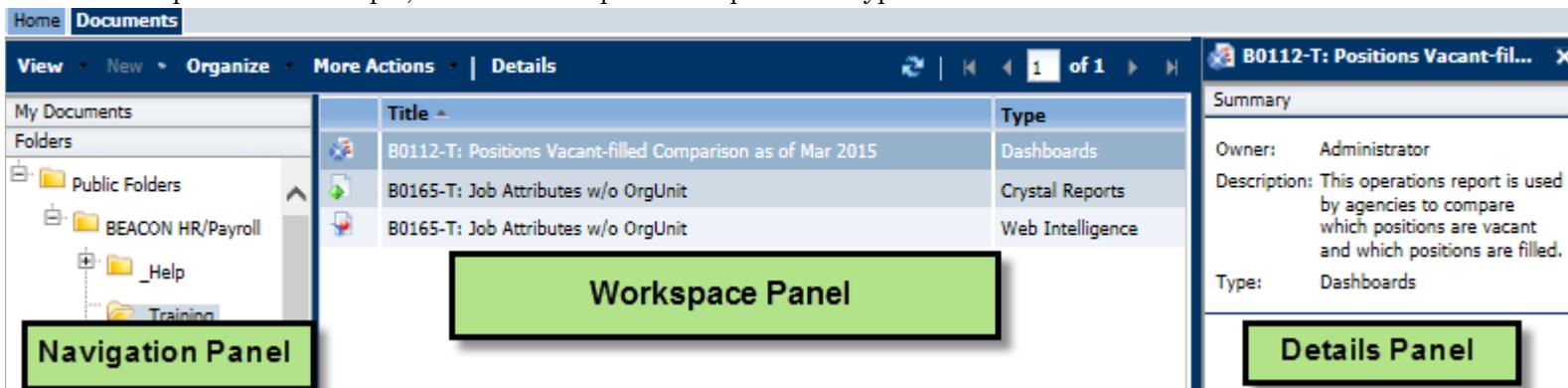
Workspace Panel

The Workspace Panel displays the objects that are located in a folder or assigned to a specific category. It is in this panel that you do activities such as viewing and modifying objects.

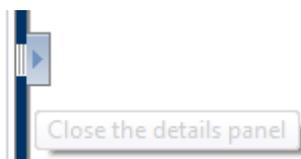


Details Panel

The Details Panel is used to view a summary of the selected object in the workspace panel. Clicking on the Details tab opens the right panel to display metadata for the selected object in the workspace panel. For example, it shows the report description and type.



To close the Details Panel, click on the X located in the top right corner of the Details Panel or click on the arrow located on the left edge of the details panel or click on the Details Tab.



Working with Documents on Launch Pad

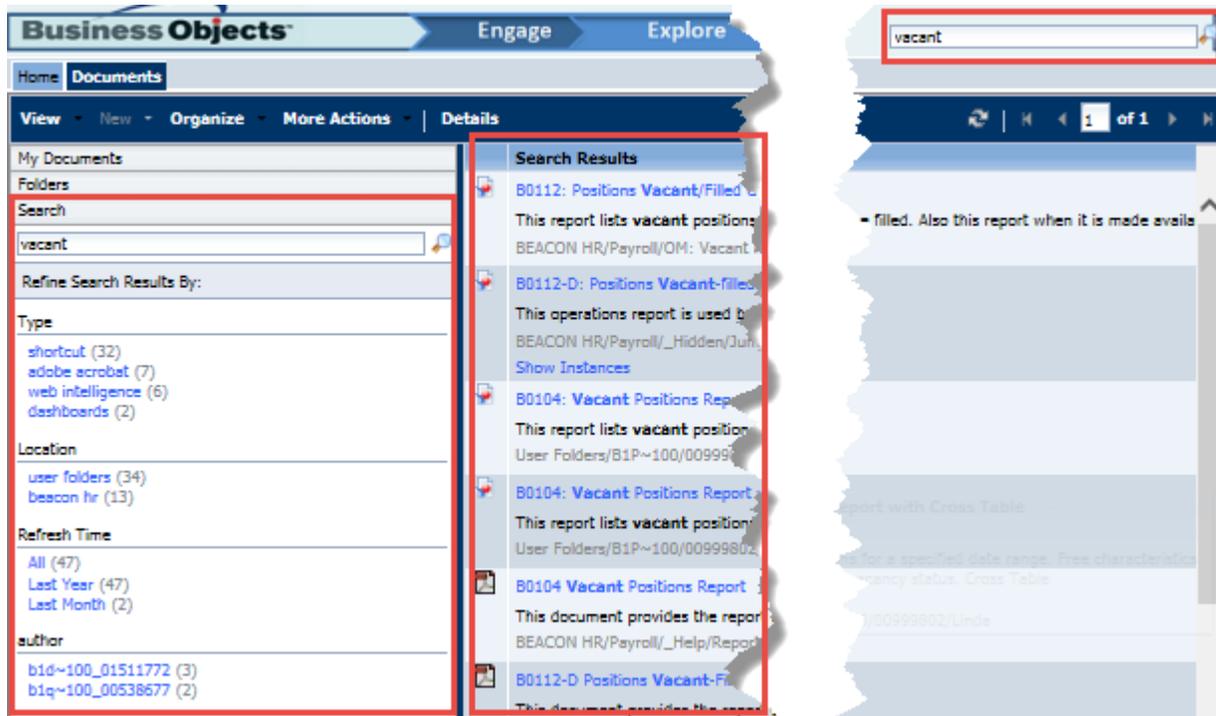
Search for a Document

Within Launch Pad, a search for documents containing specific words in their titles can be performed. Once you have executed the search, you can filter results on other dimensions. You can also view the document directly from the list. There are 2 searchable fields on the screen. One is found in the left

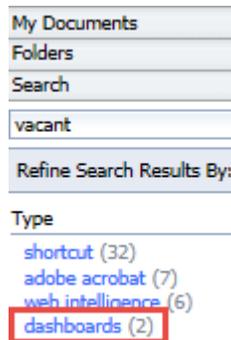
navigation panel and the other is found at the top right corner of the Business Objects window. The search feature on the Launch Pad is not case sensitive.



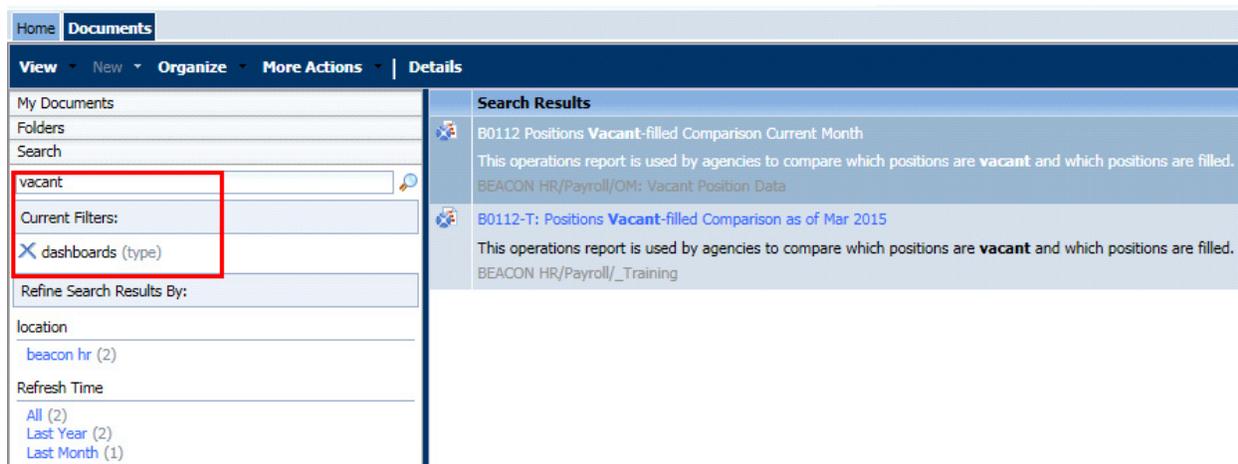
Enter your search criteria in one of the Search fields - once the data has been entered and you click on the search icon (the magnifying glass) BOBJ will automatically fill in the other search field so that both fields reflect the searched term. A list of all documents meeting the search criteria will appear in the workspace. The search term will be bold in the list.



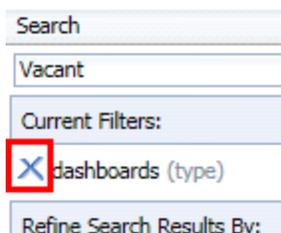
You may refine your search results by using the default results in the left navigation panel to narrow the choices returned. For example, if you want to only see search results for Dashboard Reports, click on the dashboard reports link in the type box.



Once you have selected this link, it will narrow the results and change the search results. The Current Filters field indicates that you have set a filter.

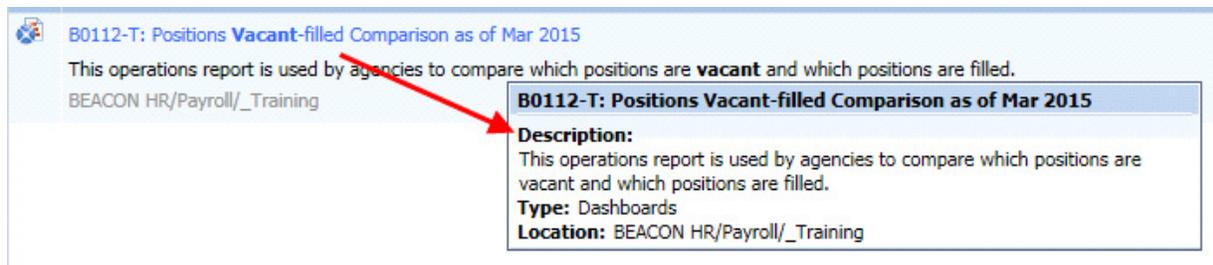


To remove the filter, hover over the X beside the filter and click.



This will return you to the original full search results.

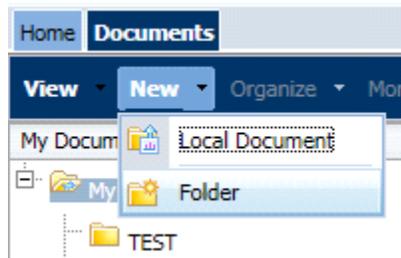
To open a report from the search results, double click the report. The report object will open in the format selected. Hovering over a report in the list or single clicking the report will display an information box showing the Description, Type and Location of the Report:



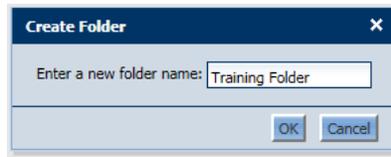
Create New Folder in My Favorites Folder

The My Document drawer located in the Document tab allows you to create your own folder structure so you can then create a shortcut to documents from the Public Folders to your My Favorites folder for quick and easy access. You may create folders in this view to organize your documents. These documents/shortcut reports are only available and viewable by you.

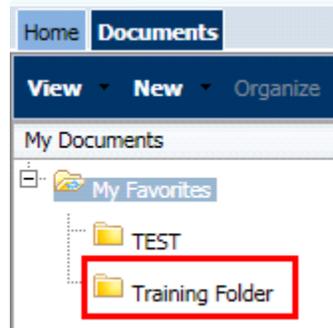
1. Click on the My Documents drawer and select the My Favorites folder, click on the New option located in the toolbar and select Folder:



2. Enter the name of the folder in the Create Folder dialog box and click OK.



3. You will then see your new folders listed.



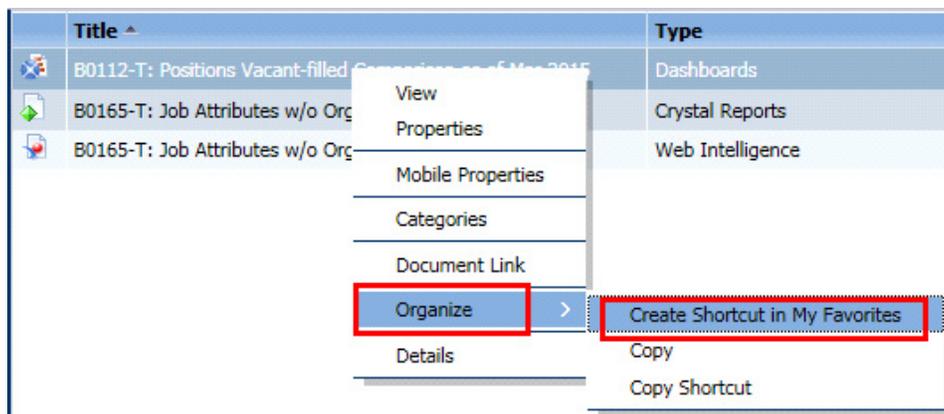
Create a Shortcut to a Document

If you want to make a document available in multiple folders in BI Launch Pad, but do not want to maintain duplicates, you can create a shortcut to the document in other folders located in the My Documents drawer/My Favorites folder. As previously stated, these documents/shortcut reports are only available and viewable by you.

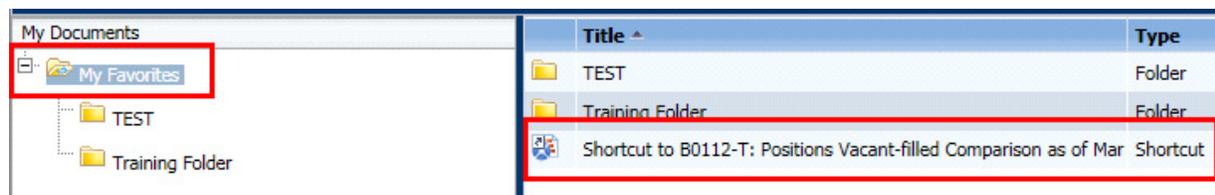
Create Shortcut in My Favorites

When using the Create Shortcut in My Favorites the report will be automatically saved to the My Favorites Folder. Choose this option if you want to customize how you access a report. The report created as a shortcut will reflect any changes made to the original report in the Public Folders.

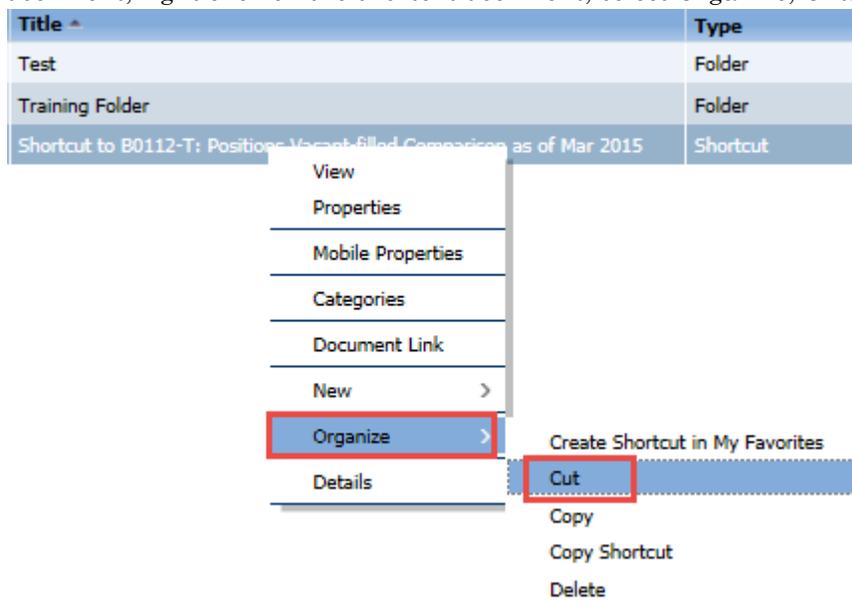
1. Select the report in the Workspace and right click on the report. Then select Organize, Create Shortcut in My Favorites.



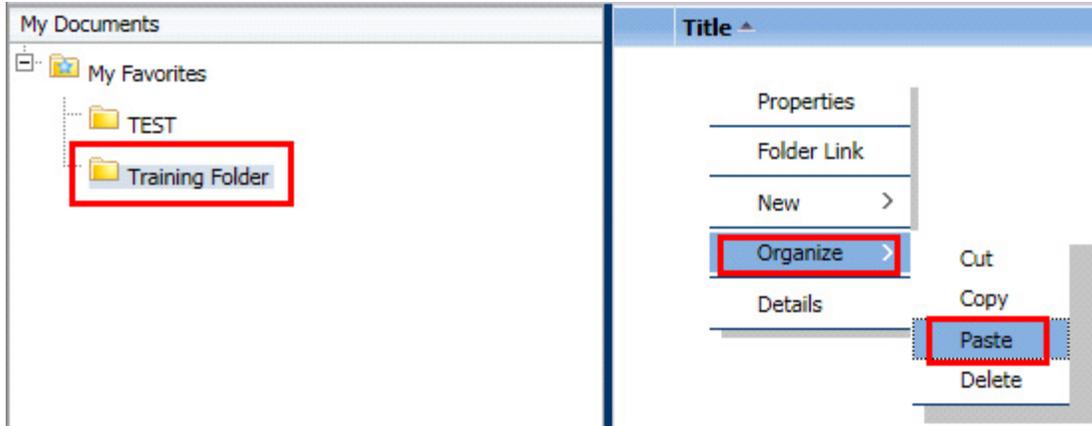
2. Open the My Documents Drawer to see the shortcut document in the My Favorites folder.



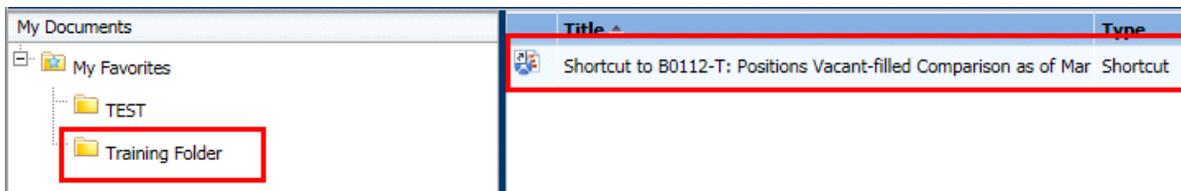
3. You can move the shortcut document to another folder located in the My Documents drawer if you would like to organize your personal folder. To move the shortcut document, right click on the shortcut document, select Organize, Cut.



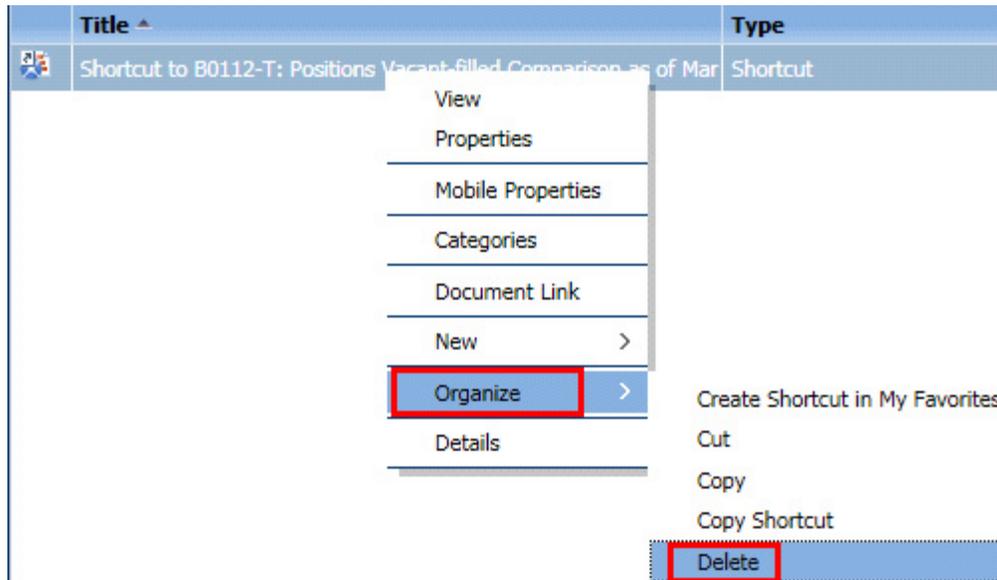
4. Navigate to the folder you want to move the shortcut document to, right click on the personal folder and select Organize, Paste.



5. Once you paste the report in the appropriate folder, it will appear in the Workspace.



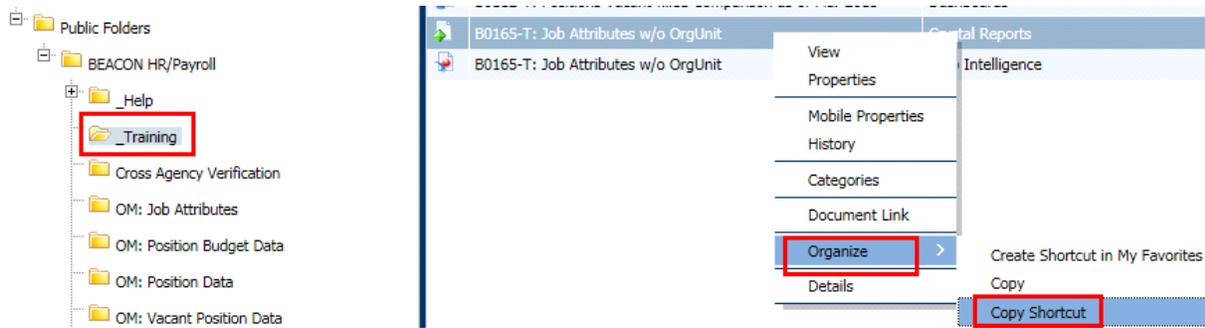
6. To delete documents from your personal folders, highlight the report, right click and select Organize, Delete.



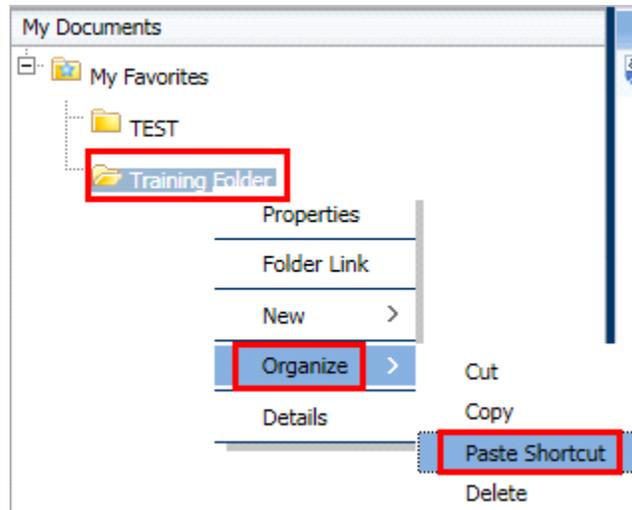
Copy Shortcut

If you select this option, the report will not automatically be saved in the My Favorites folder. You must select the appropriate folder located in the My Documents drawer where you want the shortcut to be located. Choose this option if you want to customize how you access a report. The report created as a shortcut will reflect any changes made to the original report in the Public Folders.

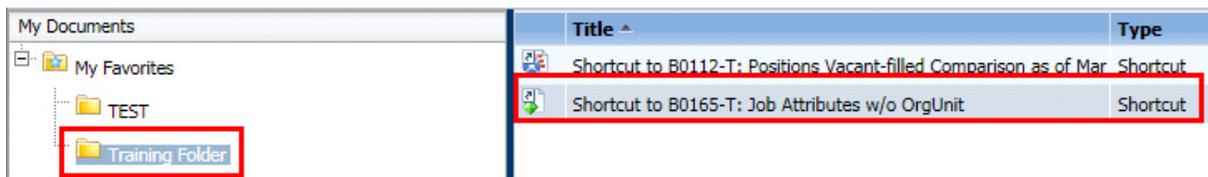
1. Select the report in the Public Folders Workspace and right click the mouse. Then select Organize, Copy Shortcut.



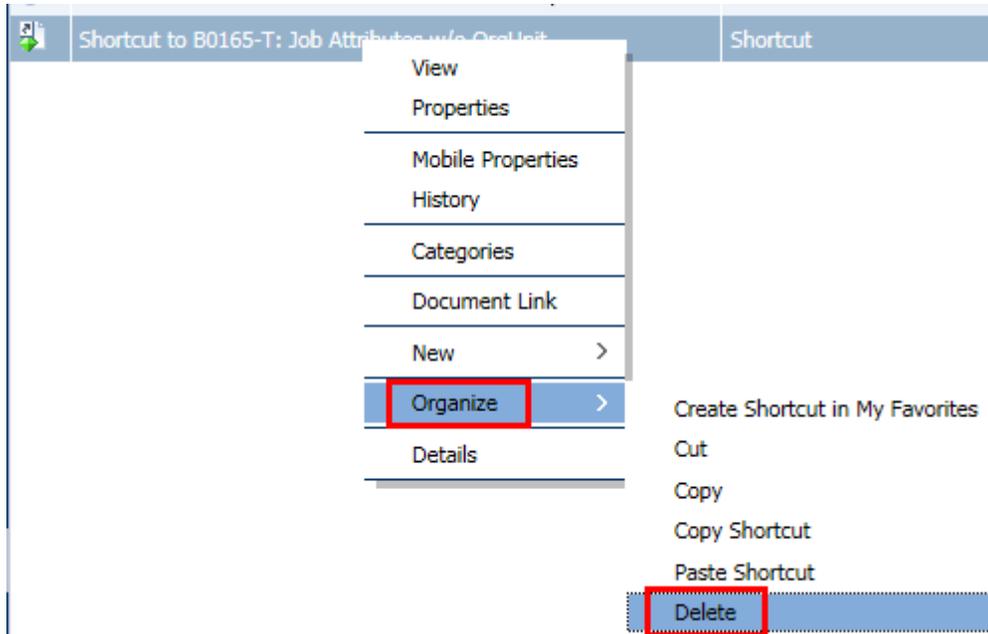
2. Open the My Documents Drawer and browse to the folder where you want the shortcut to be located. Select the folder and right click the mouse. Then select Organize, Paste Shortcut.



3. Once you paste the report in the folder, it will appear in the Workspace Panel.

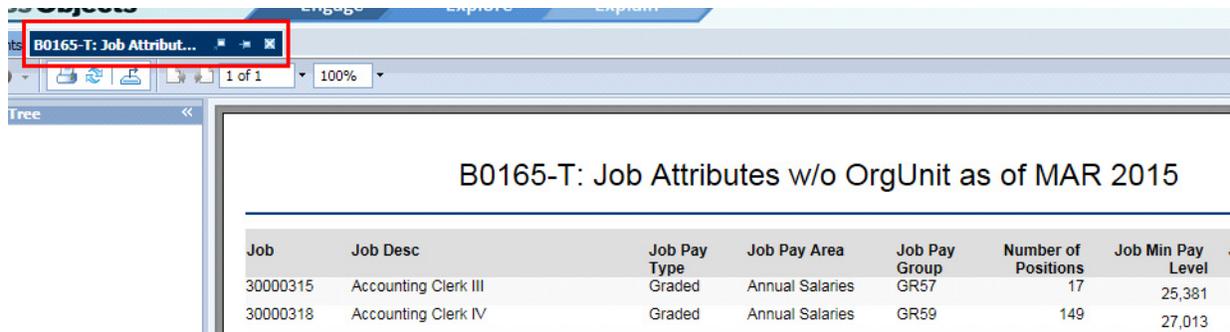


- To delete documents from your personal folders, highlight the report, right click and select Organize, Delete.



Opening Objects or Reports from Launch Pad (Public Folders)

To open an object or report from the Launch Pad, browse to the Folder that contains the report that you wish to open, double click on the report. The report will open in the workspace on a new tab.



 You may right-click on the report and select View from the menu. You may also single click on the report and click View on the toolbar option.

Pin a Report for Future Viewing

If a specific report is used on a regular basis in Launch Pad, the report can be pinned in the navigation tab so that it is always easily accessible.

Once a report is opened, the navigation tab has an option available that allows you to "Pin" the report. Click on the Pin this tab icon located in the report tab.



If this option is selected, each time you open BOBJ, the tab for the document is automatically displays and is ready for viewing.

Click on the report tab to open the report.



When you no longer need easy access to the report, you can remove the pin by clicking the Unpin this tab icon. 

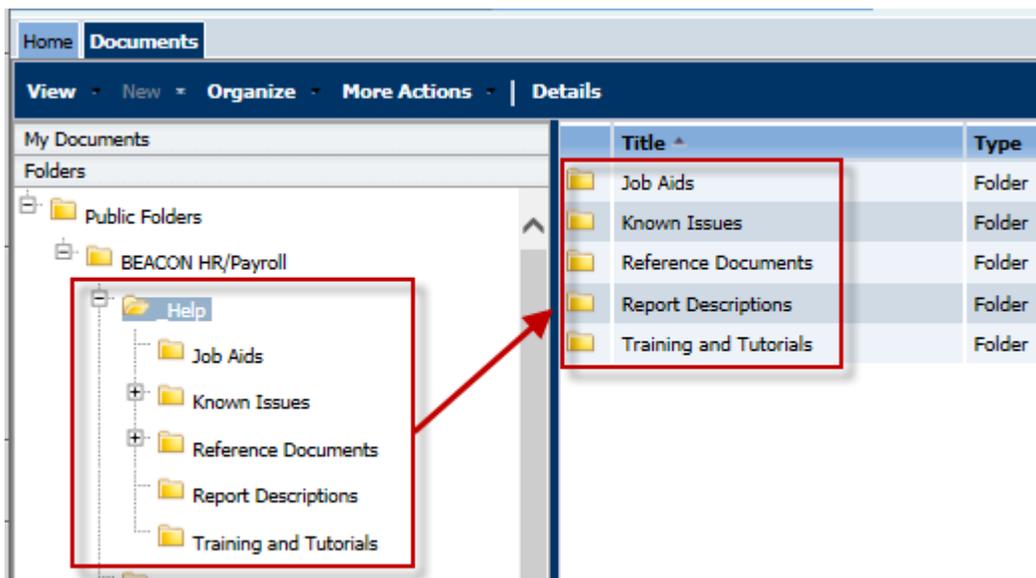
Close a Report

To close a report, click on the  located in the Report tab.



Help Folder

If you are experiencing any issues or have any questions regarding Business Objects, refer to the Help folder located in the Documents tab > Public Folders > BEACON HR/Payroll folder. The Help folder is designed to provide BOBJ users with Job Aids, Known Issues, Reference Documents, Report Descriptions and Training/Tutorials.



 As previously stated in Lesson 1, Introduction, this information is also available on the [OSC BEST Shared Services](#) website located in the BOBJ Information link.

Logging Off

You must properly log off BOBJ to release the use of the licenses. To properly log off, click on the Log Off link located in the top right corner of the Launch Pad.



SUMMARY

In this lesson, you learned to:

- Understand the definition of Business Objects
- Identify the components of the Launch Pad
- Work with the documents in the Launch Pad

BOBJ210 - Business Objects - Dashboard Reports

Introduction

Lesson 1: Business Objects Definitions and Launch Pad

Lesson 2: Dashboard Reports

Lesson 3: Crystal Reports

Lesson 4: Web Intelligence - Reading Mode

Lesson 5: Web Intelligence - Design Mode

Lesson 6 Course Review

Objectives

- Understand the definition of Dashboard Reports
- Identify the components of Dashboard Reports
- Open and View Dashboard Reports

Definition of Dashboard Reports

Dashboard Reports often provide at-a-glance views of KPIs (key performance indicators) relevant to a particular objective or business process (e.g. sales, marketing, human resources, or production). The term dashboard originates from the automobile dashboard where drivers monitor the major functions at a glance via the instrument cluster. Dashboards give signs about a business letting the user know something is wrong or something is right. The corporate world has tried for years to come up with a solution that would tell them if their business needed maintenance or if the temperature of their business was running above normal. Dashboards typically are limited to show summaries, key trends, comparisons, and exceptions. There are four Key elements to a good dashboard:

1. Simple, communicates easily
2. Minimum distractions...it could cause confusion
3. Supports organized business with meaningful and useful data
4. Applies human visual perception to visual presentation of information

"An easy to read, often single page, user interface, showing a graphical presentation of the current status (snapshot) and historical trends of an organization's key performance indicators (KPIs) to enable instantaneous and informed decisions to be made at a glance."

Components of Dashboard Reports

Components are the visual elements of your dashboard. They are designed to display or select large amounts of data in an efficient manner.

Line Chart

The "Line Chart" is ideal for showing tendency over a period of time. Use this chart in models which emphasize a trend or a continuing sequence of data.

Pie Chart

The "Pie Chart" is a circular chart that represents the distribution or participation of each item (represented by a slice) of a certain total that is represented as the overall pie value.

Stacked Area Chart

This standard chart has vertical and horizontal axis. Each point along the horizontal axis represents a data point. The actual values for the data points are plotted against the vertical axis, with each series adding to the total value.

Stacked Column Chart and Stacked Bar Chart

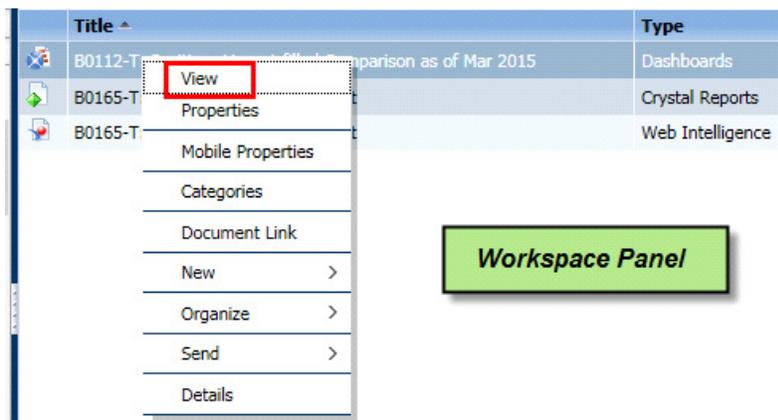
These are multi-bar charts that show and compare one or more variables, with each variable adding to the total value. These charts compare several variables over a period of time for example, marketing cost and administrative cost. Each one of the cost components is presented in a different color, and each bar represents a different time period. The total bar size represents the total cost.

To Open and View a Dashboard Report

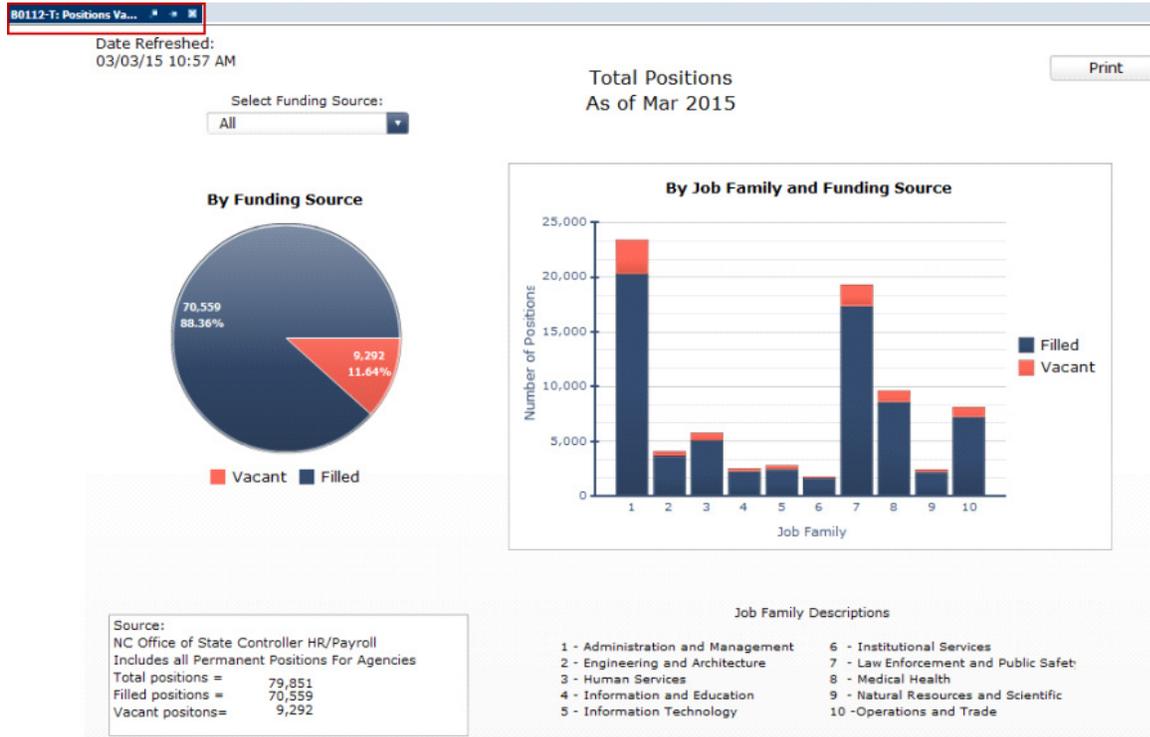
Once you log into BEACON and select the Business Objects tab, the Launch Pad will open providing access to the reports and information housed in BOBJ. Click on the appropriate folder (My Documents or Folders) to locate the report in the workspace panel which you would like to view.

 The report may also be located in the Home tab, My Recently Viewed Documents

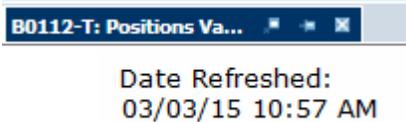
1. Double-click on the B0112-T report title in the workspace panel. You may also right click on the report title and select View.



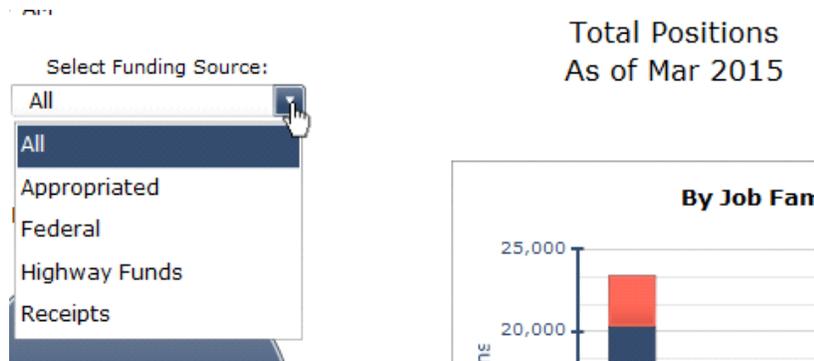
- The dashboard will load in a new tab. Only the data displayed on the screen is available for view. To dissect data, you would need to access the information using either the Crystal or WEBI format - dependent on the report build.



- There is a Data Refreshed area on the dashboard to advise the last date the data in the report was updated.



- The data initially loaded in this sample dashboard report includes all statewide data. You may change the data in the dashboard by using the drop down box and selecting from the values.



4. The dashboard report is refreshed with the data selected from the drop down box.

Date Refreshed:
03/03/15 10:57 AM

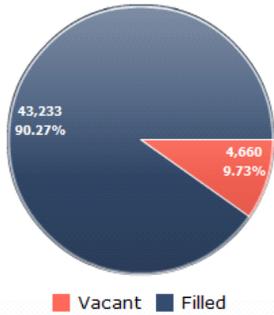
Total Positions
As of Mar 2015

Print

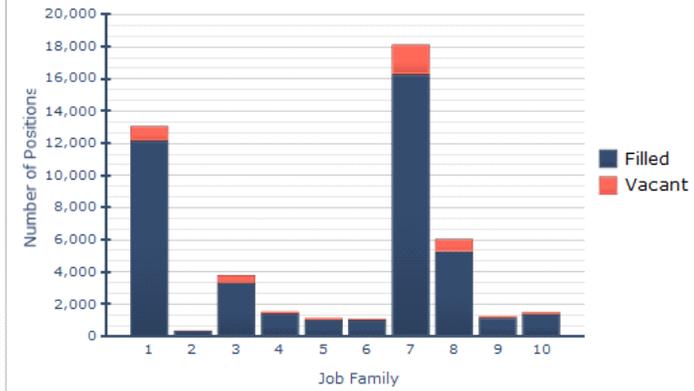
Select Funding Source:

Appropriated

By Funding Source



By Job Family and Funding Source

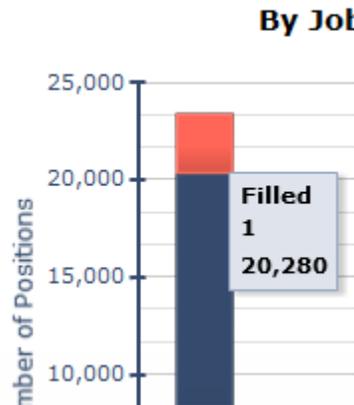


Source:
NC Office of State Controller HR/Payroll
Includes all Permanent Positions For Agencies
Total positions = 79,851
Filled positions = 70,559
Vacant positions = 9,292

Job Family Descriptions

- 1 - Administration and Management
- 2 - Engineering and Architecture
- 3 - Human Services
- 4 - Information and Education
- 5 - Information Technology
- 6 - Institutional Services
- 7 - Law Enforcement and Public Safety
- 8 - Medical Health
- 9 - Natural Resources and Scientific
- 10 - Operations and Trade

5. While viewing the dashboard, move the mouse to hover over one of the graphical displays and you will see a context sensitive box appear that expands on the information listed in the chart. You must place the mouse pointer directly over a piece of the chart and not in the general areas.



6. There is a Print option available on the dashboard if you wish to print the information.

Date Refreshed:
03/03/15 10:57 AM

Select Funding Source:
All

Total Positions
As of Mar 2015

Print

- When printing a report, change your page layout option to Landscape. The report will print better in landscape than in portrait layout.

SUMMARY

In this lesson, you learned to:

- Understand the definition of Dashboard Reports
- Identify the components of Dashboard Reports
- Open and View a Dashboard Report

BOBJ220 - Business Objects - Crystal Reports

Introduction

Lesson 1: Business Objects Definitions and Launch Pad

Lesson 2: Dashboard Reports

Lesson 3: Crystal Reports

Lesson 4: Web Intelligence - Reading Mode

Lesson 5: Web Intelligence - Design Mode

Lesson 6 Course Review

Objectives

- Understand the definition of Crystal Reports
- Open and view a Crystal Report

Definition of Crystal Reports

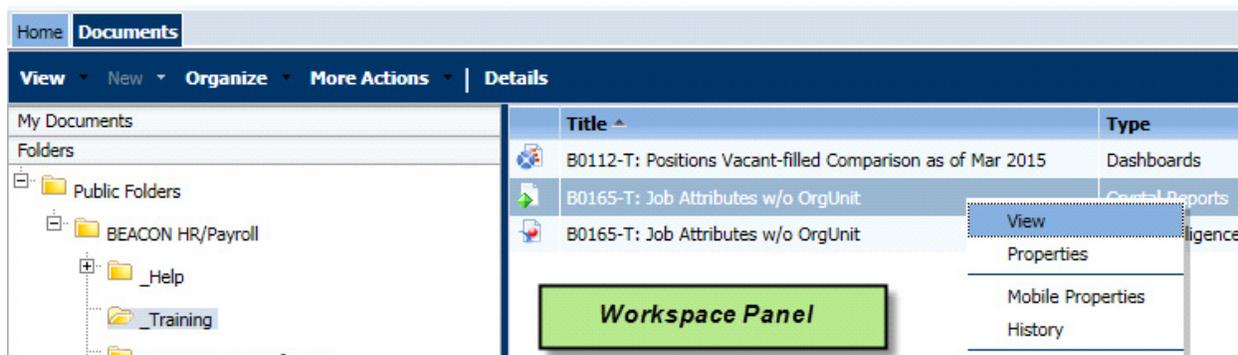
Crystal Reports are delivered reports with prompt selections for users to run and generate reports. These reports are pixel perfect with complex layouts which can be printed or exported to PDF format. Graphics, charts and other external objects can be embedded in a crystal report to provide professionally formatted reports.

To Open and View a Crystal Report

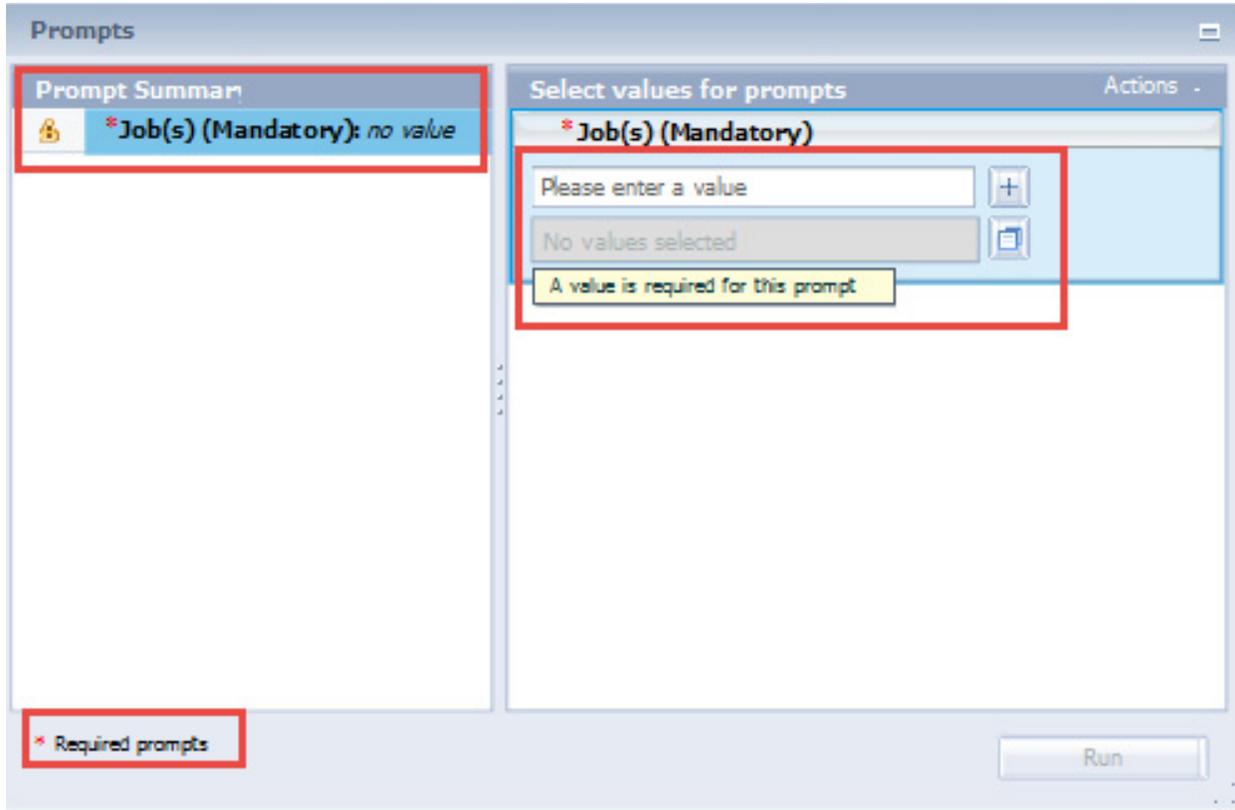
Once you log into BEACON and select the Business Objects tab, the Launch Pad will open providing access to the reports and information housed in BOBJ. Click on the appropriate folder (My Documents or Public Folders) to locate the report in the workspace panel which you would like to view.

 The report may also be located in the Home tab, My Recently Viewed Documents.

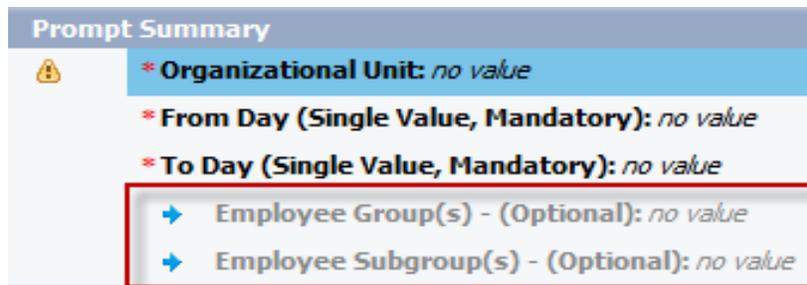
1. Double-click on the B0165-T Crystal report title in the Workspace Panel. You may also right-click on the report title and select View.



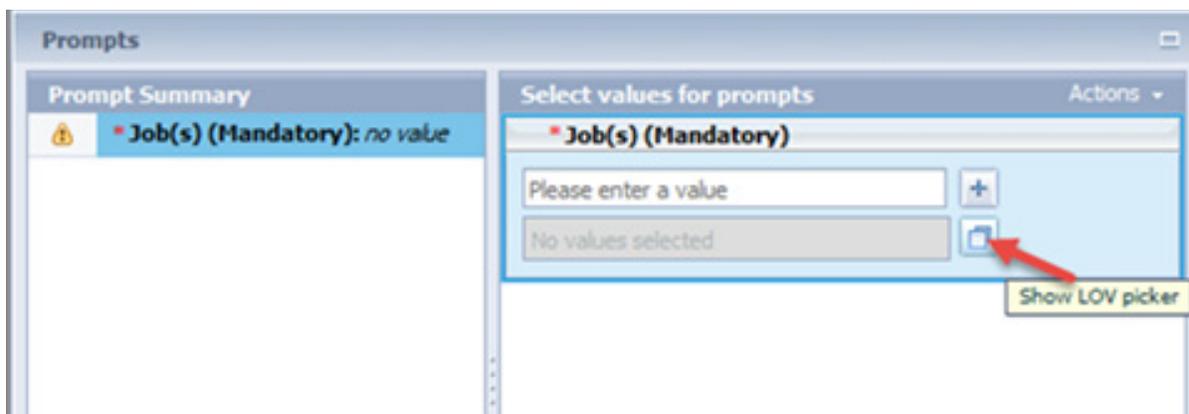
- Once the report is open, you will see a Prompts box. This box contains the values that are defined for the report. Any value that contains an asterisk (*) is a required field. You must enter a value in these fields before you can view the report.



- The Prompts box is unique to the report you have selected. Some Prompts may include optional Prompts Summary which are indicated with a blue arrow  but are not pre-filled or required. They are used to assist with limiting the amount of data that is retrieved into the body of the report.

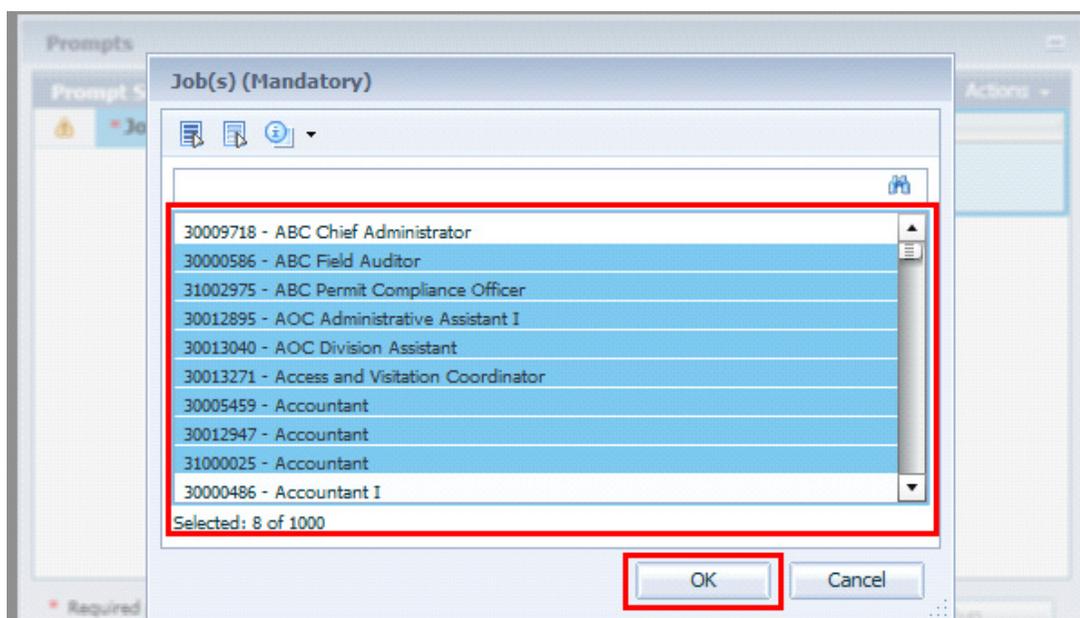


- To make a selection, click the **Show LOV picker** icon - .



- Most of the prompts will now allow direct entry rather than requiring drop down selection. There are some exceptions to this depending on how the prompt was defined. The selection is still required for the Organizational Unit prompt.

- This will open a selection box for you to select values for prompts.

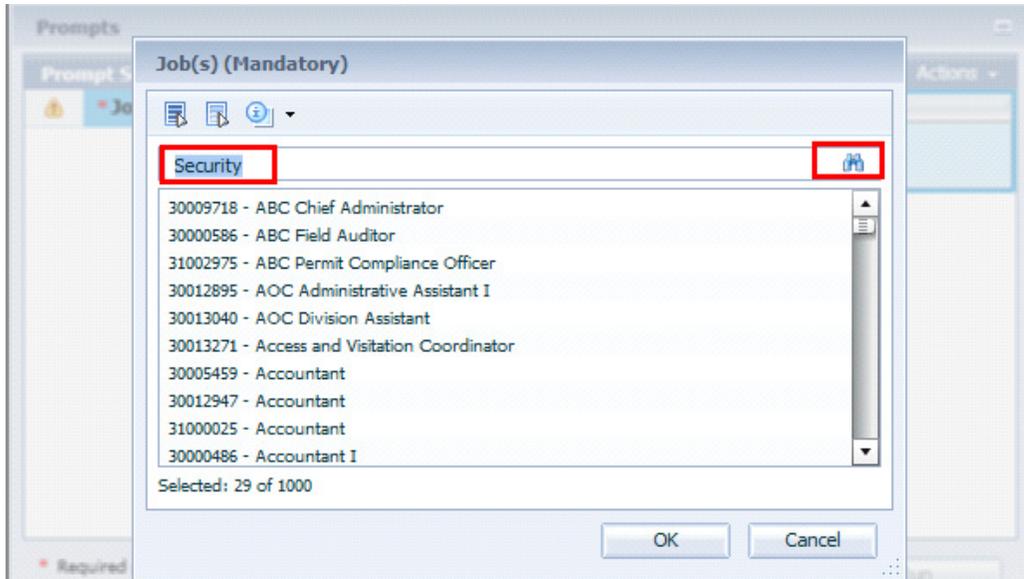


- You may select all values by clicking on the Select All Values icon . You may also deselect all values by clicking on the Select no values icon . To show only the selected values, click on the Show all/selected values icon .

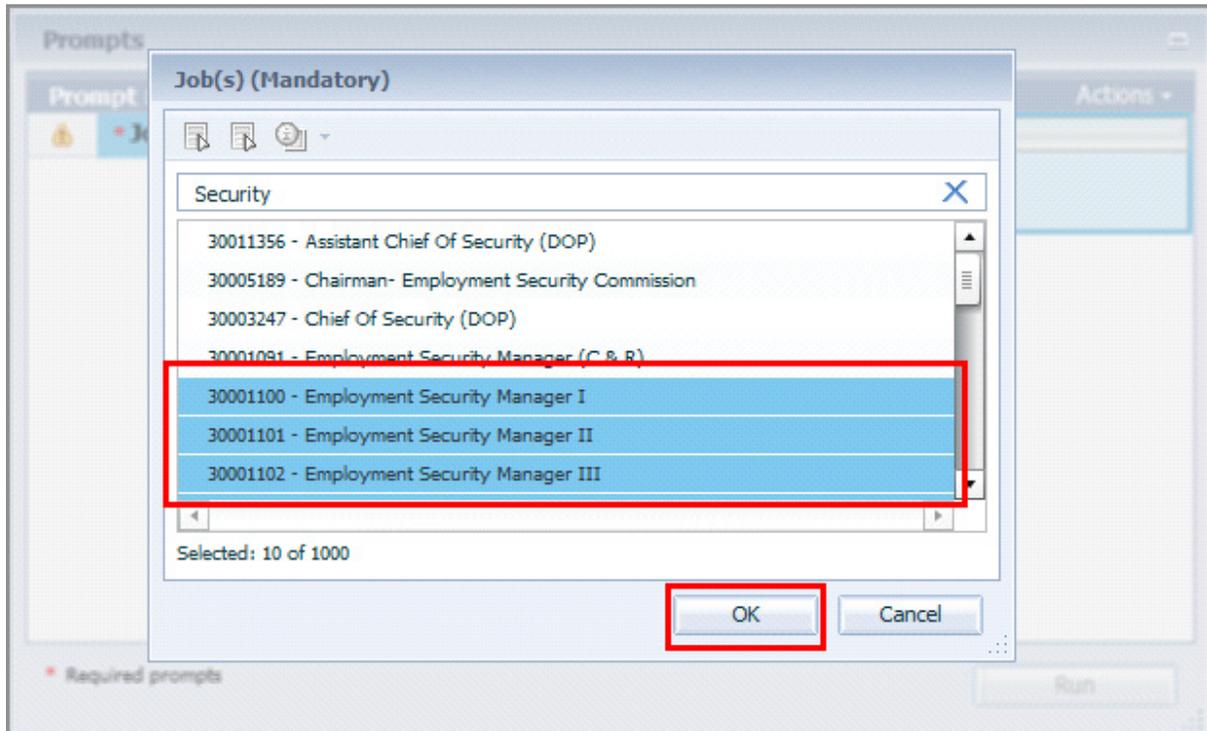
- The selection box lists 1000 values at a time. To see the next set of values, you must scroll to the end of the current list and click the display more values option.

- Now that you have selected your value(s), click OK.

- You may also enter a search value in the Search field box to narrow the list to select from. You may search using words or numbers. You do not need to use the asterisk (*) wildcard in the search field. Once you have entered the value, click on the binocular search icon to execute the search. The Search field is case sensitive.



You will then see the list of values narrowed to meet the search criteria. Click on the value(s) you wish to select to highlight them. Once values are highlighted, click OK.



- Once all selected values for prompts are entered, click the Run button in the lower right hand corner to run the report.



The warning icon is now a green check indicating that the mandatory prompt is set.

- The report will appear in the Workspace.

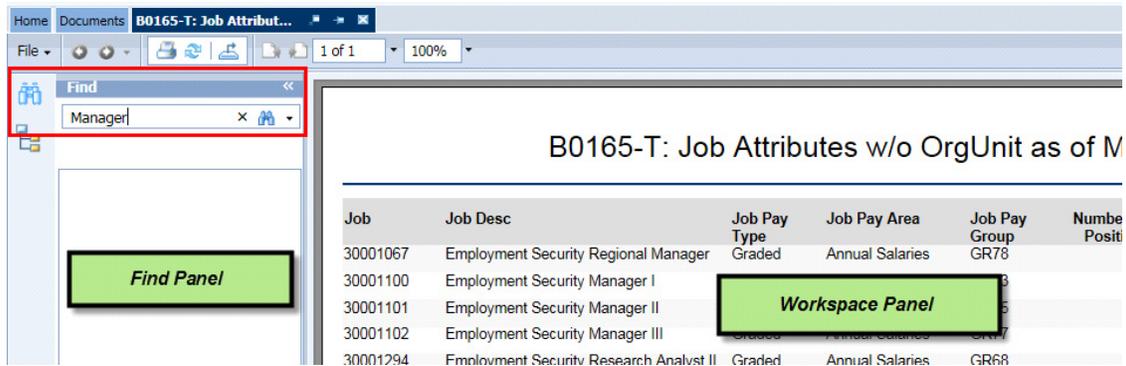
Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary
30001067	Employment Security Regional Manager	Graded	Annual Salaries	GR78	6	54,887	90,780	72,833	0.00
30001100	Employment Security Manager I	Graded	Annual Salaries	GR73	19	44,347	72,346	58,346	52,519.00
30001101	Employment Security Manager II	Graded	Annual Salaries	GR75	37	48,195	79,204	63,699	57,544.50
30001102	Employment Security Manager III	Graded	Annual Salaries	GR77	13	52,551	86,707	69,629	64,516.10
30001294	Employment Security Research Analyst II	Graded	Annual Salaries	GR68	1	36,761	58,006	47,384	0.00
30001295	Employment Security Research Analyst III	Graded	Annual Salaries	GR70	1	39,632	63,372	51,502	60,401.00
30003122	Military Security Assistant Chief	Graded	Annual Salaries	GR68	1	36,761	58,006	47,384	44,969.00
31004062	IT Security Specialist	Graded	Annual Salaries	GR68	1	36,761	58,006	47,384	44,969.00

The Execution Date is located in the top right corner of the report to show the date the report was run.

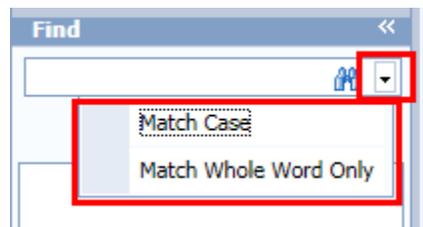
Navigation Panel

- Find Option** - Click on the Find icon to open the Find panel. This allows a search for titles, keywords, and/or measures within the report. The search results will be listed in the Find panel.

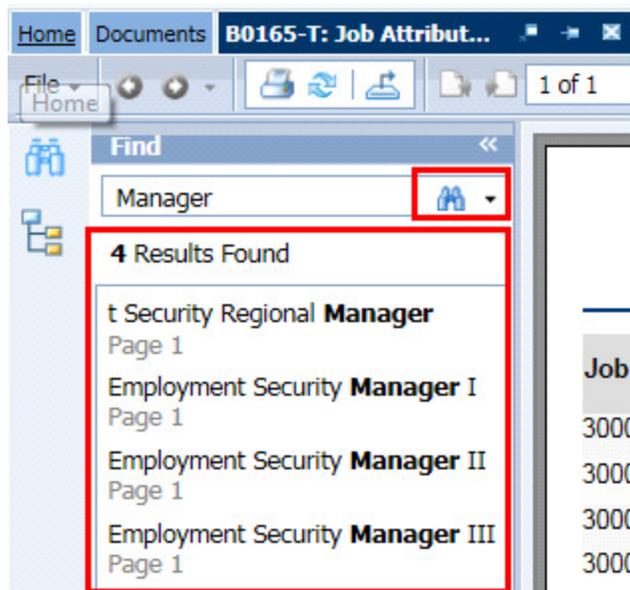
a Type the title, keyword, and/or measures in the search field.



Click on the arrow to the right of the binocular if you would like to change the output results of the Find feature (for example, Match Case or Match Whole Word Only). The default is open search with no parameters.

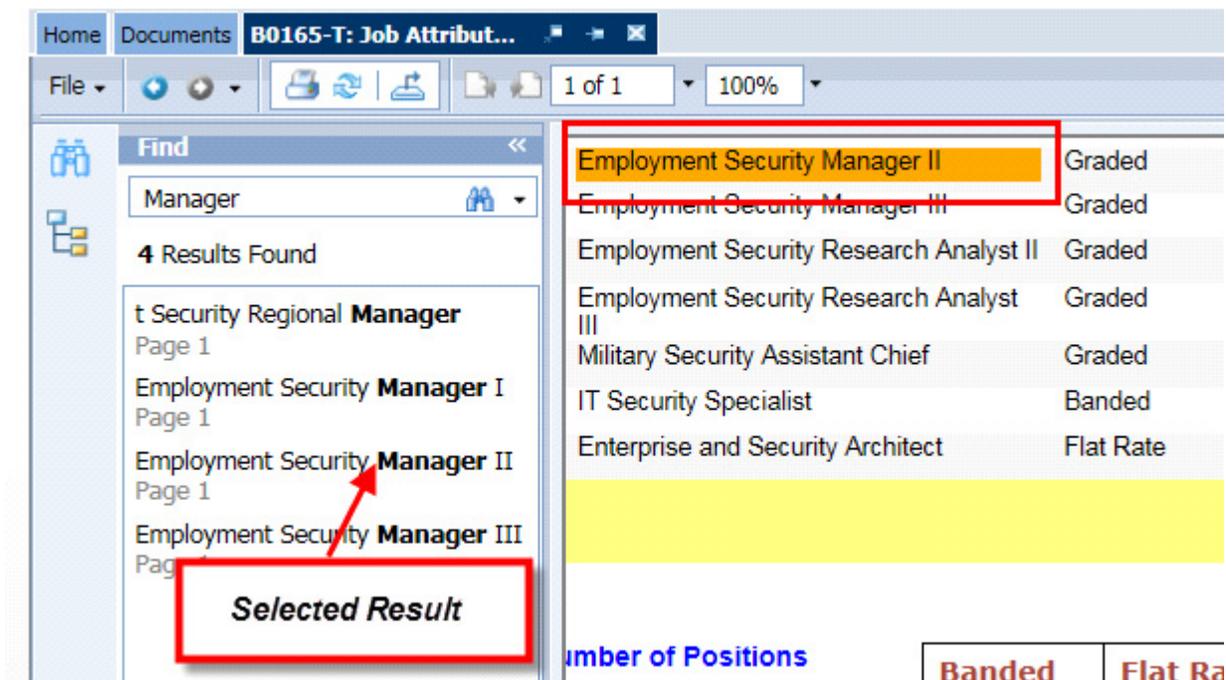


b Click on the binoculars to display the search results.



c Click on the result found to navigate to the selected result.

The selected result is highlighted in the report.



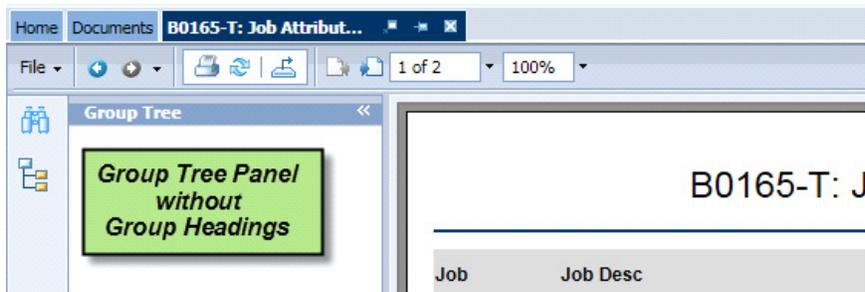
- d Click on the double arrows in the top right corner of the panel to minimize the Find panel. Your search will remain in the search panel while the report is open.



- 2. **Group Tree Icon** -  - Click on the Group Tree icon to display the Group Tree panel. The headings for each group in the report are displayed in this panel. To show all groups reflected in the report click on the plus sign to expand.

The Group Tree is unique to the report selected - not all reports have group headings.

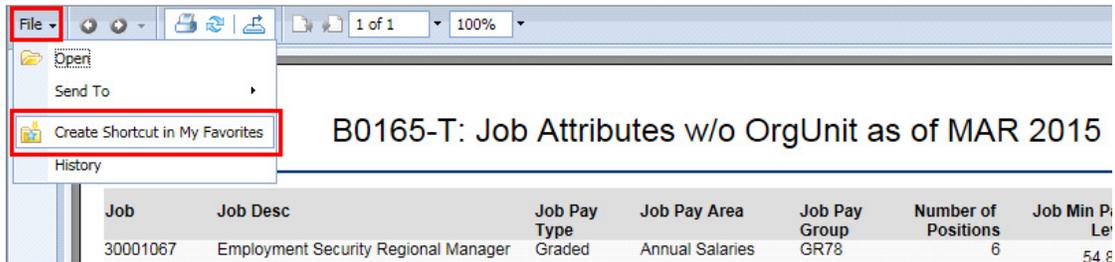
- a Selected Crystal Report without group headings - shown below:



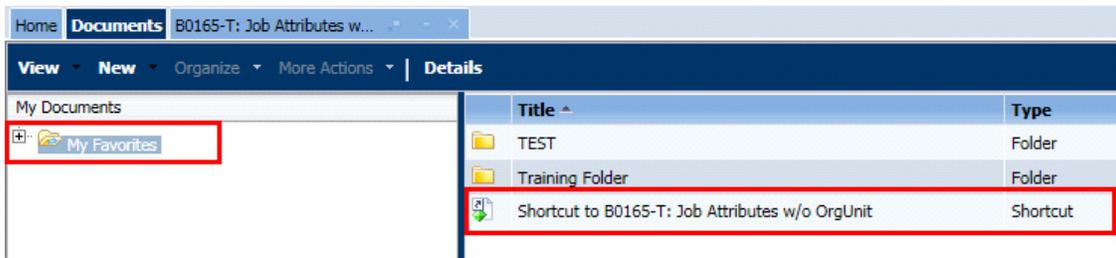
Toolbar Elements



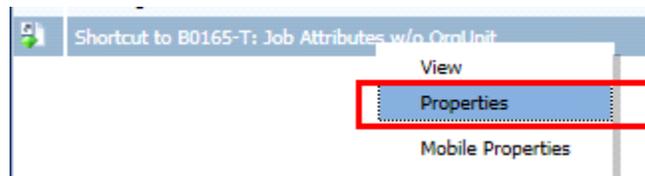
1. **File** - a copy of the report link can be created in your My Favorites folder as a shortcut.
 - a Click on the File drop down on the toolbar and select Create Shortcut in My Favorites:



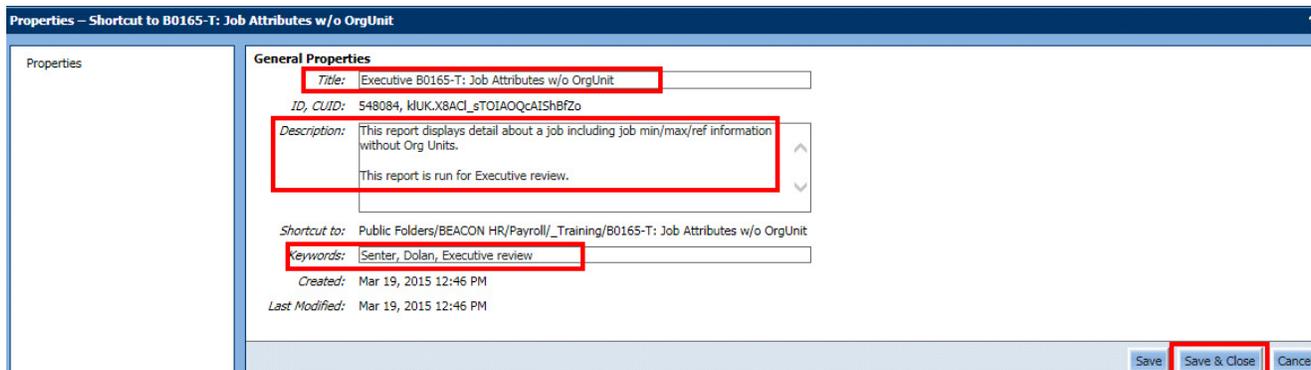
- b You will then see the report shortcut in your My Favorites folder:



Once the report shortcut is in the My Favorites folder, it can be cut and pasted to sub-folders to better organize your workspace. You may also change the title of the report, add additional description and keywords by opening the Properties box for the shortcut.



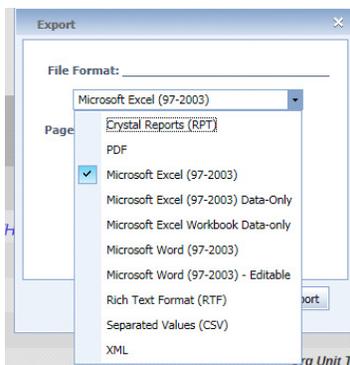
- c Once the title, description, and/or keywords as been changed, click on the Save & Close button located in the bottom right corner.



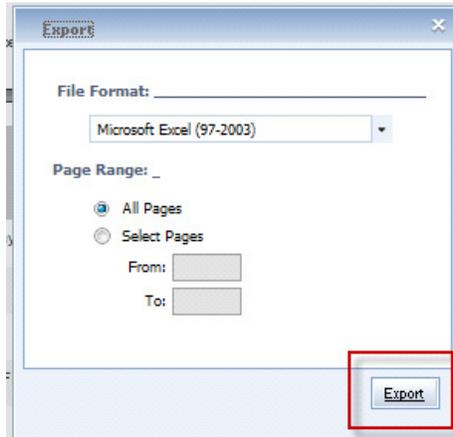
- 2. **Print the Report** -  DO NOT USE - Report must be exported to a PDF file to print (see #4 Export the Report).
- 3. **Refresh Data** - The data in a Crystal report can be refreshed on demand by clicking on the Refresh Report icon on the toolbar. The Prompts box will appear and you have the opportunity to select new values when the report is refreshed on demand. If you only want to refresh using the original values, click Run.



- 4. **Export the Report** -  the report may be exported to a variety of file formats by clicking on the Export icon and selecting the format in which you want to export the report.



- a Once you have selected your format, the system defaults to export All Pages. You may elect to export only a portion of the report by entering a page range in the appropriate box. Once you have determined the export criteria, click on the Export button at the bottom right.



- b Once you click Export, the following box appears for you to determine if you want to open or save the exported file. The exported file will be saved on your computer and not within BOBJ.



- The File Download options may appear different dependent on the browser you are using. If you use IE10, the download will appear in the bottom of the browser window with the option available to you to open or save.

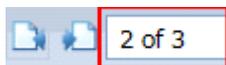
- c File Exported to Excel:

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Sa
30001067	Employment Security Regional	Graded	Annual Salaries	GR78	6	54,887	90,780	72,833	
30001100	Employment Security Manager I	Graded	Annual Salaries	GR73	19	44,347	72,346	58,346	52,51

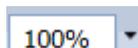
- 5. **Page Navigation** - allows you to select next, previous, last, or first page to view.



6. **Go to Page** - allows you to type in the page number you want to view.



7. **Zoom factor** - allows you to select zoom factor for the report.



Prompt Selections for Organizational Units and Dates

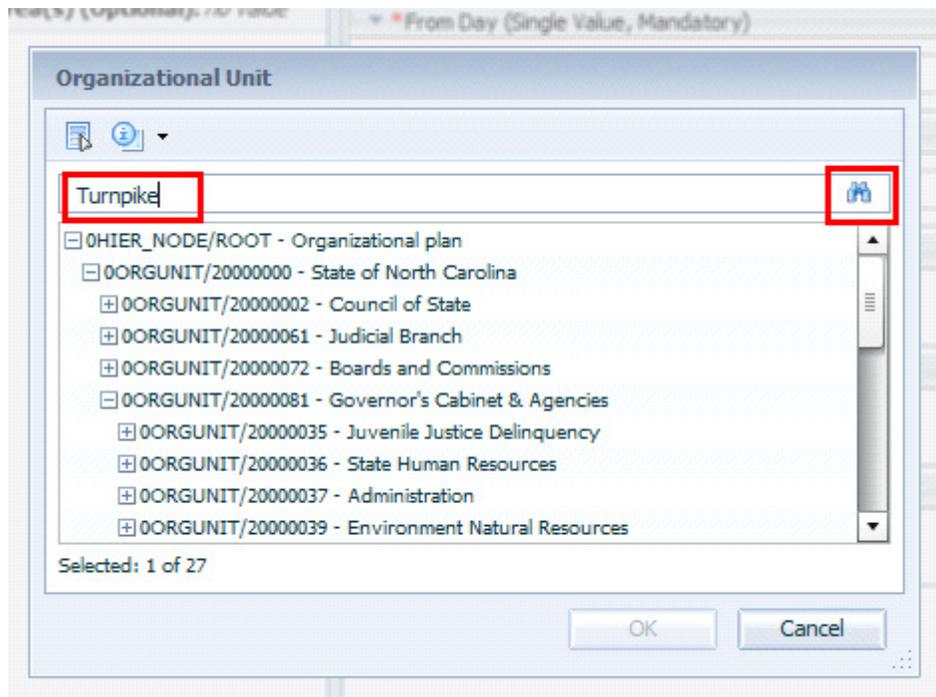
As a reminder, Crystal reports are for viewing purposes. They are pre-formatted with the only options of altering data based on prompt selections.

Selecting Organizational Unit(s) on Prompts Box

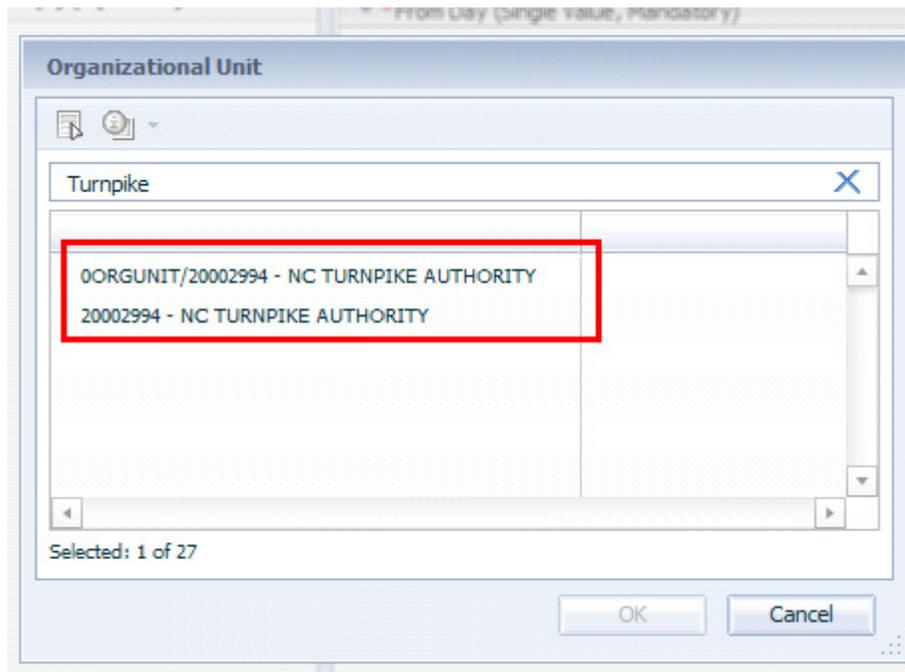
When selecting Organizational Unit values on the Prompts box, you may click on the plus sign (+) to drill down to specific organizational units. If you select an Organizational Unit with the plus sign (+) in front of it, then you are selecting that Organizational Unit and every Organizational Unit underneath it.



 You may also enter a search value in the Search field box to narrow the Organizational Unit list to select. You may search using words or numbers in the search field. You do not need to use the asterisk (*) wildcard in the search field. Once you have entered the value, click on the binocular search icon to execute the search. Note the Search field for Organizational Unit is not case sensitive.



You will then see the list of values narrowed to meet the search criteria. Click on the value(s) you wish to use to select and show in the Prompts box.

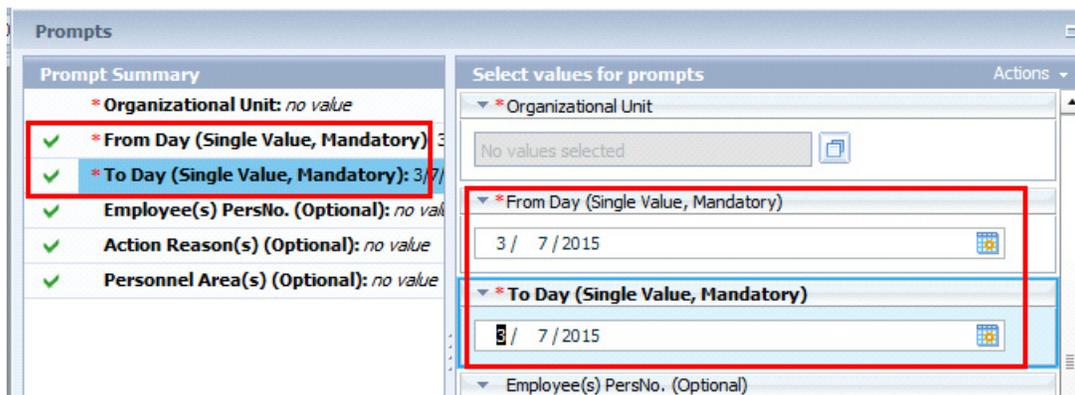


Selecting Dates on Prompts Box

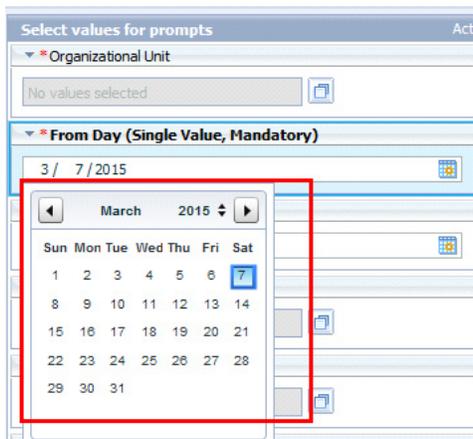
When selecting dates on the Prompts box, you may have the option to select From Day / To Day values, Calendar Month/Year values, or a range of dates.

1. Selecting From Day / To Day Values

- a When you click on From Day and/or To Day in the Prompt Summary, the current date defaults in the value field(s).



- b To select another day, click on the month icon. This will bring up a calendar so you can select a new date. Double-click the date you wish to run the report for and it will populate in the value field.



-  You may enter a date directly in the prompt rather than clicking on the month icon.

2. Selecting Calendar Month/Year (Single Value):

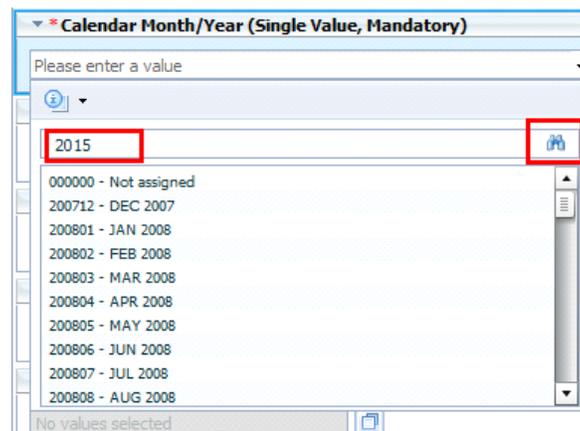
- a Click in the drop down arrow beside the Calendar Month/Year value field option. This will bring up a list of dates available for selection. Double-click the date you wish to run the report for and it will populate in the value field.

 You may enter a Month/Year directly in the prompt rather than clicking on the drop down arrow beside the Calendar Month/Year value field option.

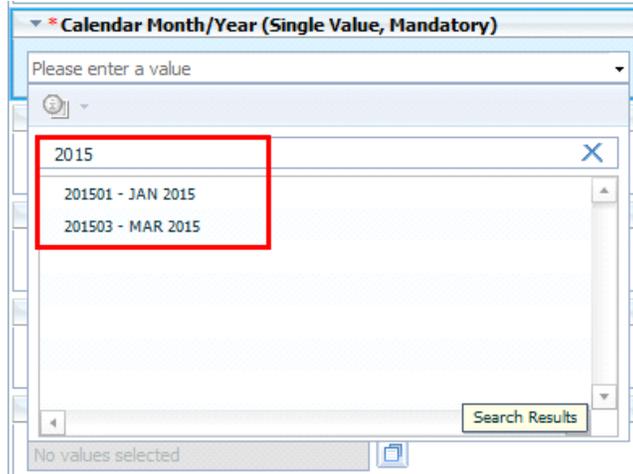


 You may also enter a search value in the Search field box to narrow the date list to select. You do not need to use the asterisk (*) wildcard in the search field.

- b Once you have entered the value, click on the binocular search icon to execute the search.

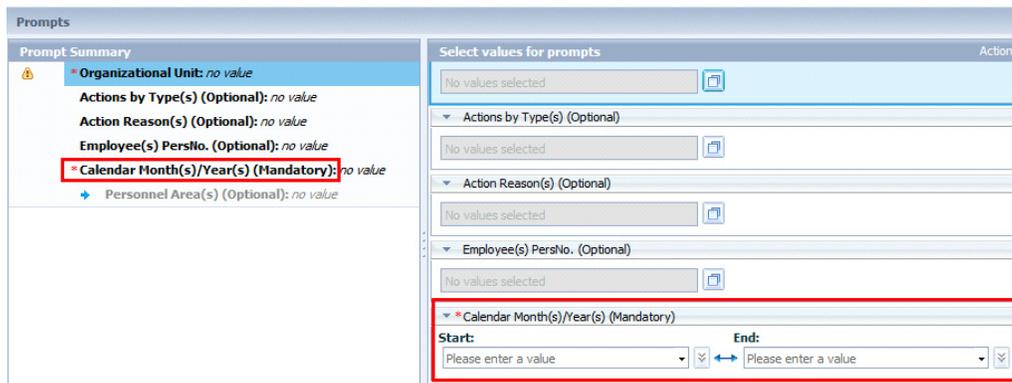


- c You will then see the list of dates narrowed to meet the search criteria. Click on the date you wish to use to select and show in the Prompts box.



3. Selecting Calendar Month(s)/Year(s):

- a Click in the drop down arrow beside the Calendar Month/Year Start value field option. This will bring up a list of dates available for select. Select the date you wish to run the report for and it will populate in the value field. Once the Start value is entered, you must select the End value by following the same procedures when selecting the Start value.



- 📁 You may enter another Month/Year directly in the prompt rather than clicking on the drop down arrow beside the Calendar Month/Year Start value and/or Calendar Month/Year End value field options.
- 📁 You may also enter a search value in the Search field box to narrow the date list to select. You do not need to use the asterisk (*) wildcard in the search field. Once you have entered the value, click on the binocular search icon to execute the search.

SUMMARY

In this lesson, you learned to:

- Understand the definition of Crystal Report
- Open and View a Crystal Report

BOBJ230 - Business Objects - Web Intelligence Reading Mode

Introduction
Lesson 1: Business Objects Definitions and Launch Pad
Lesson 2: Dashboard Reports
Lesson 3: Crystal Reports
Lesson 4: Web Intelligence - Reading Mode
Lesson 5: Web Intelligence - Design Mode
Lesson 6 Course Review

Objectives

- Understand the definition of Web intelligence (WEBI) - Reading Mode
- Open and view a Web Intelligence Report

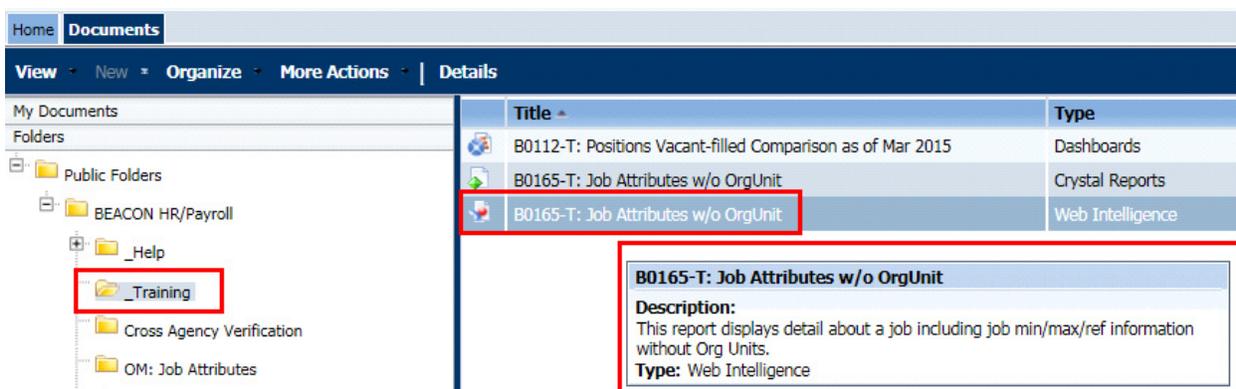
Definition of Web Intelligence

Web Intelligence (WEBI) allows you to perform querying, reporting and analysis tasks all in a single tool. It provides an easy-to-use interface with powerful query features that allows your business analysts and nontechnical information consumers to ask spontaneous and iterative business questions of their data.

To Open and View a Web Intelligence Report

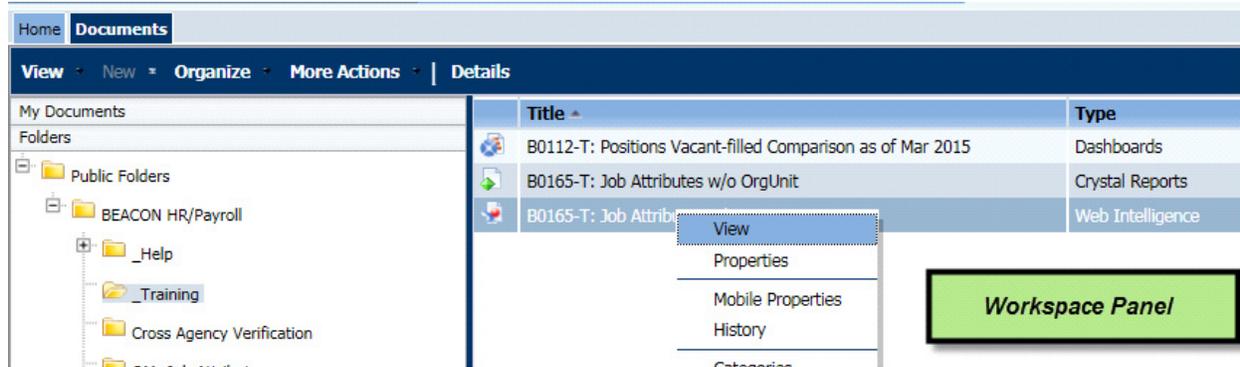
Once you log into BEACON and select the Business Objects tab, the Launch Pad will open providing access to the reports and information housed in BOBJ. Click on the appropriate folder (My Documents or Public Folders) to locate the report in the workspace panel which you would like to view.

 The report may also be located in the Home tab, My Recently Viewed Documents.

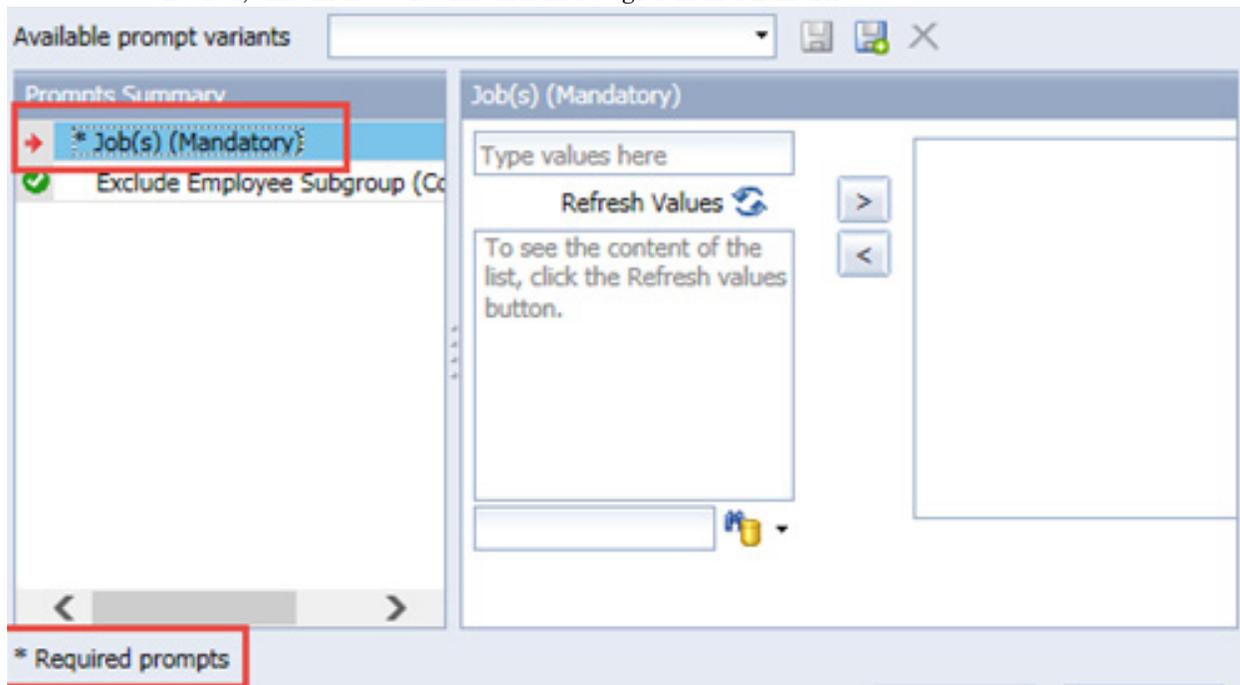


 Hovering over a report in the list or single clicking the report will display an information box showing the Description, Type, and Location of the Report.

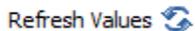
1. Double-click on the report title in the Workspace Panel. You may also right click on the report title and select View.



2. Once the report is open, you will see a Prompts box. This box contains the values that are defined for the report. Any value that contains an asterisk (*) is a required field. You must enter a value in these fields before you can view the report. When a valid value(s) is entered, this indicator will turn into a green check mark .



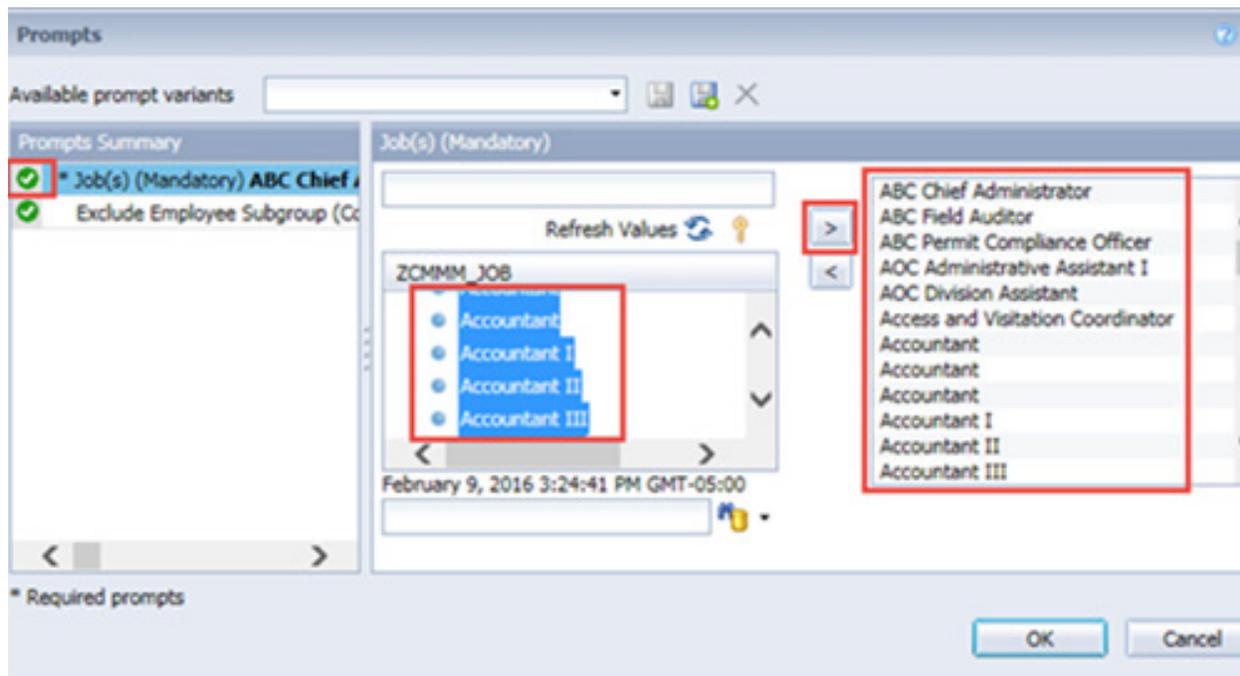
 The Prompts box is unique to the report you have selected. There may be additional fields that are optional which allow you to further refine your search.

3. Highlight the value in the Prompts Summary field and click on the Refresh Values option to load the content for selection. 

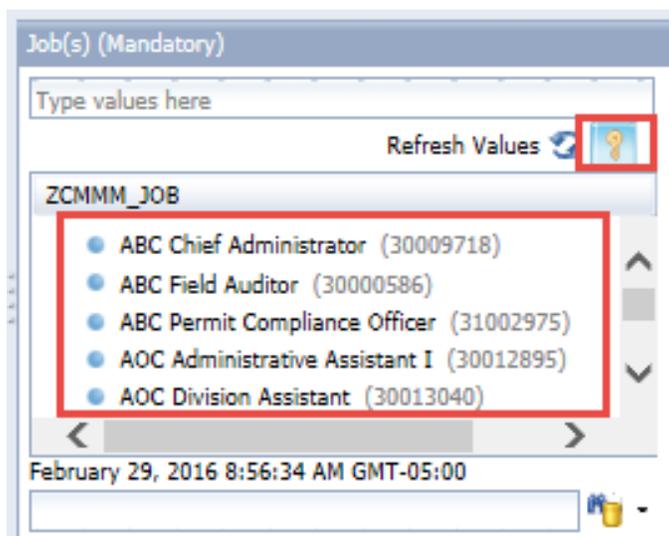
 Most of the prompts will now allow direct entry rather than requiring drop down selection. There are some exceptions to this depending on how the prompt was defined. The selection is still required for the Organizational Unit prompt.

4. Once the values are loaded in the content area for selection, single click on the selected value and click the right arrow to add to the selected prompt window. Notice that once the value(s) are selected, the Red Arrow  beside the mandatory field becomes a Green Check 

- You may click and hold Shift or Ctrl on your keyboard and click on the selected values to highlight multiple values before clicking on the right arrow to add to the selected prompt window.

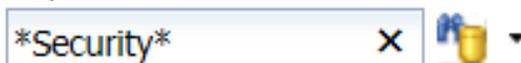


- The Key icon located next to Refresh Values is an option available to use if you would like to see the key (number) associated with the values in the list.

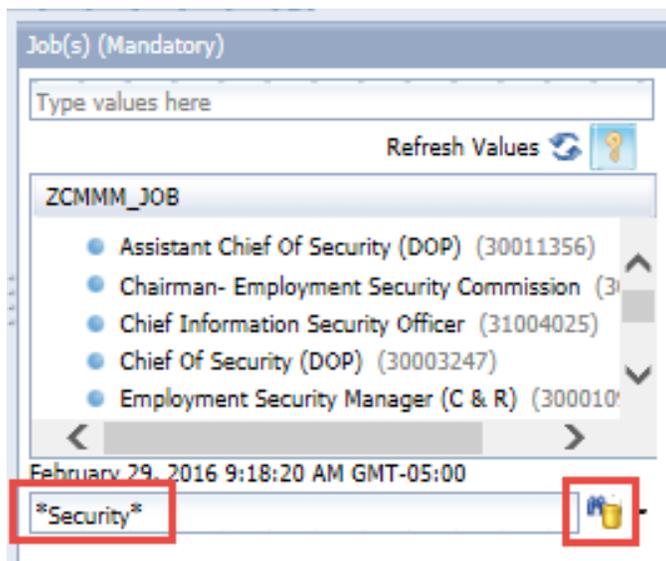
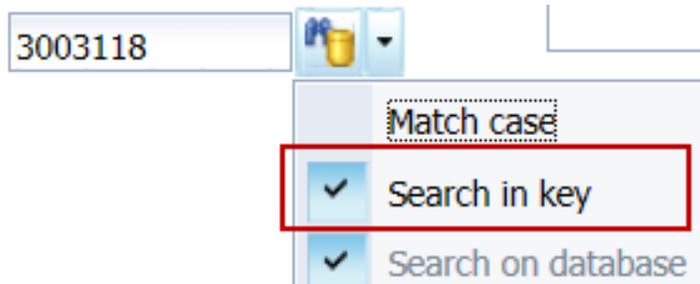


- You may also enter a search value in the Search field box to narrow the list to select from. Once you have entered the value, click on the binocular search icon to execute the search.

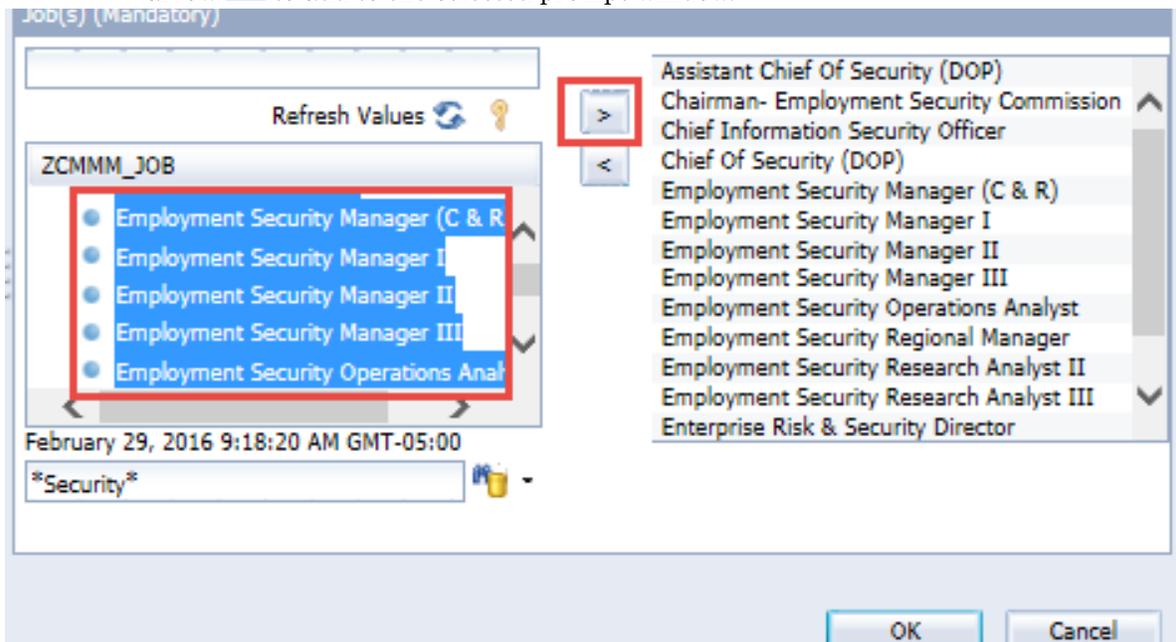
- To search by text, the search feature in WEBI is case sensitive. You do have to use the asterisk (*) wildcard before and after the text in the search criteria.



- To search in key, click on the drop down arrow located by the binocular search icon and select "Search in key".

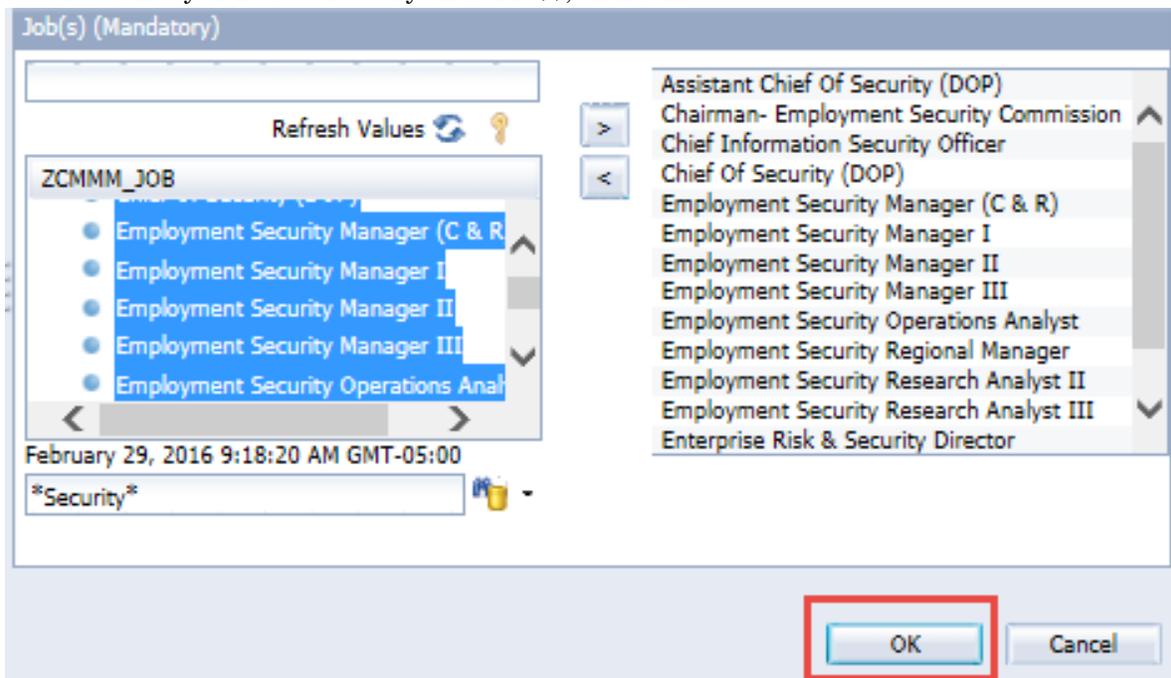


You will then see the list of values narrowed to meet the search criteria. Click on the value(s) you wish to select to highlight them. Once the values are highlighted, click the arrow **>** to add to the selected prompt window.



To remove a selected value in the prompts box, highlight the appropriate value and click the arrow **<**.

5. Now that you have selected your value(s), click OK.



6. The report will now be loaded and appears in your work space.

B0165-T: Job Attributes w/o OrgUnit as of MAR 2015 Execution Date: 3/17/15

MAR 2015

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary
30005459	Accountant	Flat Rate	Flat Rate	FLATRATE	1	20,000	350,000	0	47,830.67
30009718	ABC Chief Administrator	T-Grade	Annual Salaries	TG60	1	59,969	99,446	79,708	91,000.00
30012947	Accountant	Graded	Judicial	JB20	1	45,768	74,017	59,893	53,637.00
30013040	AOC Division Assistant	Graded	Judicial	JB15	1	35,079	53,284	44,182	44,916.00
30013271	Access and Visitation Coordinator	Flat Rate	Judicial	30013271	5	37,942	59,747	0	39,366.58
31000025	Accountant	Banded	Career Banding	31000025	320	37,012	96,811	59,342	58,599.38
31002975	ABC Permit Compliance Officer	T-Grade	Annual Salaries	TG65	7	33,001	50,881	41,941	37,447.00

B0165-T Job Attributes without OrgUnit

Track changes: Off 100% < 1 minute

Web Intelligence Modes of Review

WEBI has two modes of review available - Reading Mode and Design Mode (See Lesson 5).

This online web training will cover the WEBI Reading mode. The Design Mode will be taught as an instructor led WEBI course.

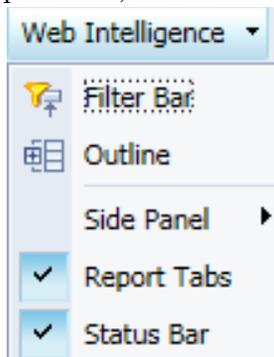
1. Reading Mode - simplifies the Web intelligence interface, providing only those functions associated with exploring and analyzing reports. Special functions associated with reading mode include the Filter Bar and Freeze mode.
2. Design Mode - Design mode expands the Web Intelligence interface. It also allows you to explore and analyze reports. Additional special functions associated with Design mode are available, such as the Report Elements tab, the Formatting tab, the Data Access tab, the Analysis tab and the Page Setup tab. You use Design mode for the majority of your work when creating a Web Intelligence document. Many interface elements are available only in this mode.

Reading Mode

Toolbar Menu



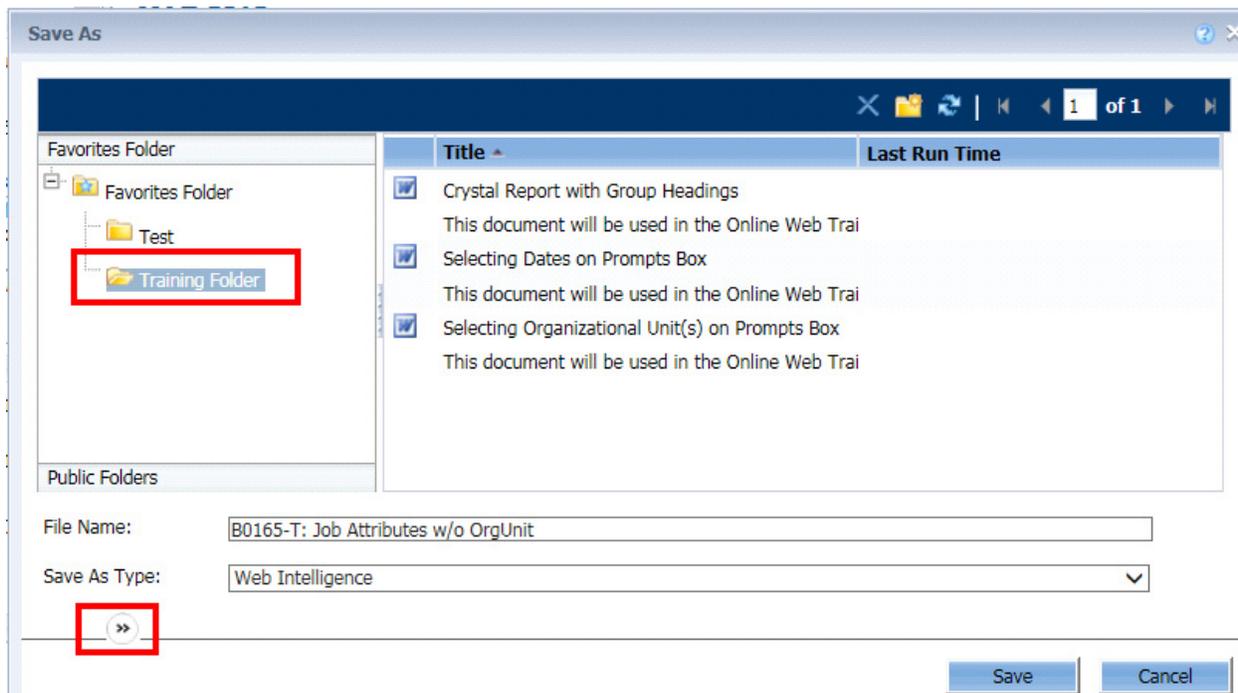
- **Web Intelligence** - drop down menu allows you to view or hide the various menu bars such as the Filter Bar, Outline, Side Panels, Report Tabs, and/or Status Bar.



- **Save** -  - allows you to save a report in the My Documents drawers, My Favorites folder.
 1. Click on the Save drop down arrow on the toolbar and select Save As



2. You will then see a Save As box. You must click on the Favorites Folder drawer and then double click on the appropriate folder located in the Favorites Folder in order to open to folder. Click on the double arrow to expand the Save As box to review additional fields.



- You may change the File Name and add additional information in the Description as well as in the Keywords fields. Once you have updated the field(s), click Save.

Save As

File Name: Training B0165-T: Job Attributes w/o OrgUnit

Save As Type: Web Intelligence

Description: This report displays detail about a job including job min/max/ref information without Org Units. This report will be used for training purposes.

Keywords: Job, Job Details, Job Attributes, training

Assign Category:

Refresh on open
 Permanent regional formatting

Save Cancel

- The report has been saved and can be accessed by clicking on the appropriate folder located in the My Favorites folder.

Title	Type
Shortcut to B0112-T: Positions Vacant-filled Comparison as of Mar	Shortcut
Shortcut to B0165-T: Job Attributes w/o OrgUnit	Shortcut
Training B0165-T: Job Attributes w/o OrgUnit	Web Intelligence

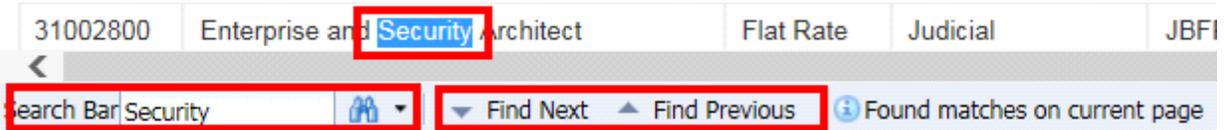
If updates are made to the report located in the Public Folders, your saved report will not be updated.

- Print** - Report will be exported to a PDF file to print.

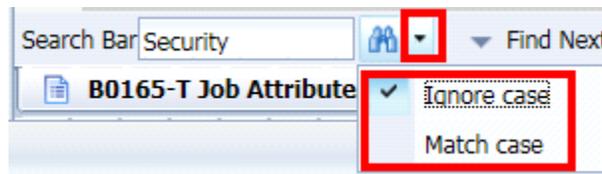
- **Find**  - allows you to find words or numbers within the report.
 1. Click on the Find icon to display a Search Bar in the bottom left corner of the report tab.



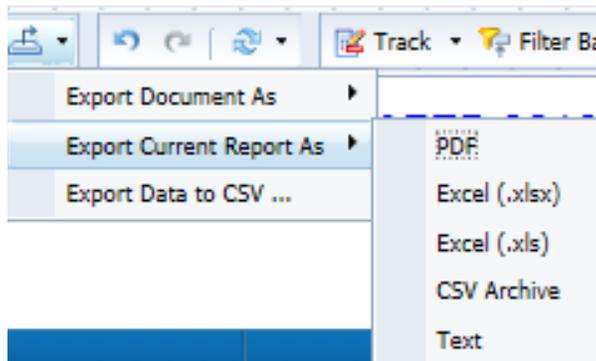
2. Type the word in the Search field and click the binocular icon. The result(s) will be highlighted in the report.



- 📁 You may click on Find Next and/or Find Previous to see your search results on the page(s)
- 📁 Click on the arrow to the right of the binocular if you would like to change the output results of the Find feature (for example, Ignore case or Match case).

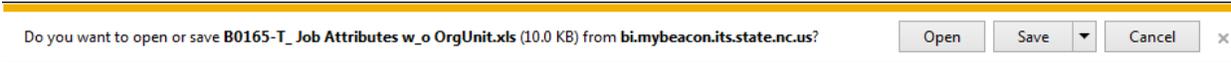


- **Export**  - the report may be exported to a variety of file formats by clicking on the Export icon and selecting the format in which you want to export the report.

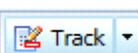
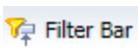


- 📁 When exporting to Excel from Web Intelligence, choose the 'Excel 2007' format in order to accommodate more than 65K rows. If you have more than 65K rows of data and you choose the 'Excel' format for exporting, your data will be split into two worksheets in Excel with the first sheet containing the 65K and the remainder will be placed in a second sheet.

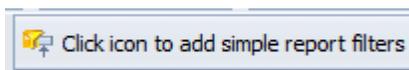
- Once you select the format, the following box appears for you to determine if you want to open or save the exported report/document. The exported report/document will be saved on your computer and not within BOBJ.



 The File Download options may appear different dependent on the browser you are using. If you use IE10, the download will appear in the bottom of the browser window with the option available to you to open or save.

- Undo and Redo**  - Reverses the previous action or Reverses the undo action.
- Refresh**  - The data in the report can be refreshed on demand by clicking on the Refresh icon on the toolbar. The Prompts box will appear and you have the opportunity to select new values when the report is refreshed on demand. If you only want to refresh using the original values, click OK.
- Track:**  This option is an advanced feature and will not be covered at this time.
- Filter Bar**  - shows or hides the Filter Report toolbar.

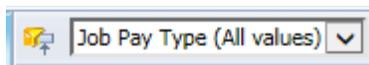
- Click on the Filter Bar icon to add another toolbar at the bottom of the basic toolbar menu



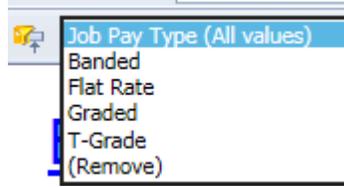
- Click on the key icon and then click **Others** to see the list of available data elements.



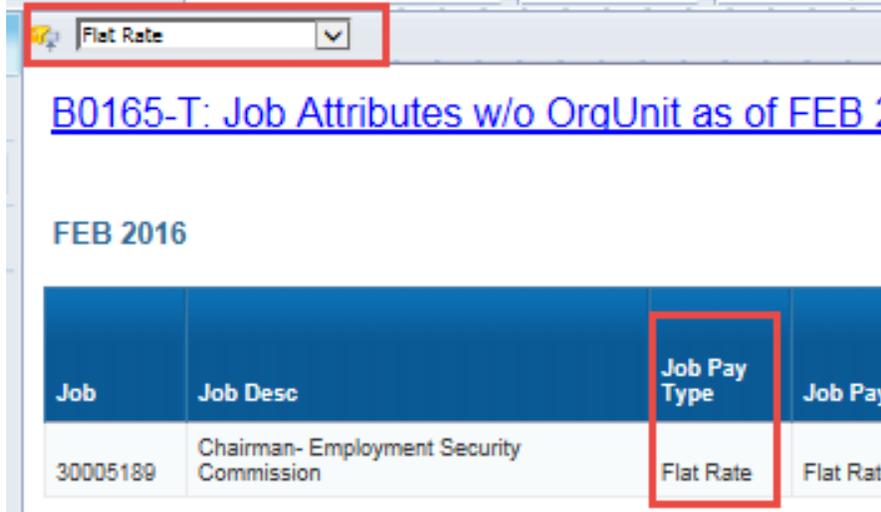
- Select the data element you would like to filter on. The data element selected will appear in the filter bar as an item that can be used for filtering.



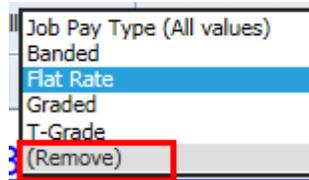
- Click on the drop down box and select the data value you would like to filter on to apply the filter.



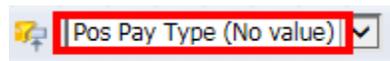
- Once the filter has been applied, the rows not contained in the filter are hidden from view.



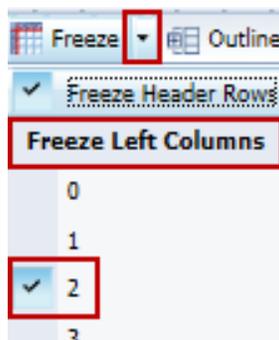
- To remove the filter from the bar, click on the drop down box and click (Remove).



- Ensure that the data element is displayed in the report layout before adding it to the filter bar, otherwise the filter will be empty and no values can be selected.



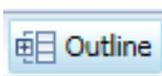
- Freeze**  - The Reading mode enables you to freeze column headers or a specific number columns in a table to ensure that they remain visible as you scroll through the rest of the table.
 - You must select a cell within your table in order to activate the Freeze icon.
 - Click the Freeze drop down box and click on the number to Freeze Left Columns. If you click the 2 under the Freeze Left Columns, the first 2 columns remain visible while you scroll through the additional columns of the table.



3. To unfreeze the left columns, clear the Freeze Left Column check box or select 0.

 Freeze Header Rows is defaulted but you may unfreeze the header rows by clearing the Freeze Header Rows check box.

 You must be in Quick Display Mode.  to function properly.

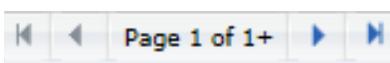
- **Outline**  - This option is an advanced feature and will not be covered at this time.

Status Bar

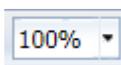
At the bottom of the report page is the Status Bar. From here, you can view the pages, change display mode, zoom and see when the last refresh was completed.



- **Track changes:** This option is an advanced feature and will not be covered at this time.

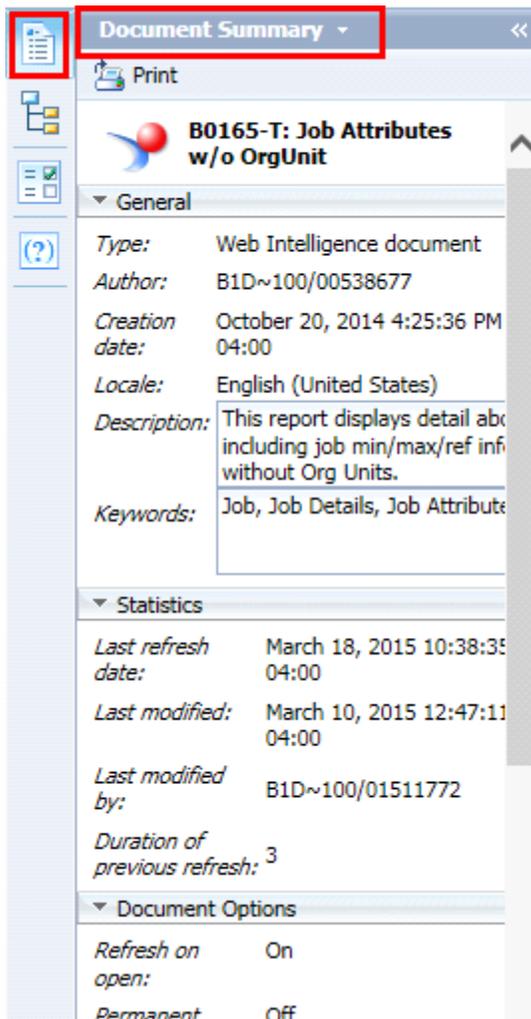
• **Navigation:**  - allows you to move through the pages of a document. If there is a + sign next to the second page number, this indicates the report is more than one page. If you click on the "Page 1 of 1+" text, you will be able to enter a page number for direct navigation.

• **Display Options:**  - allows you to toggle between Quick Display mode and Page mode. Page mode gives you a preview of how it would look when printed. You must be a Quick Display mode when you use the Freeze functionality.

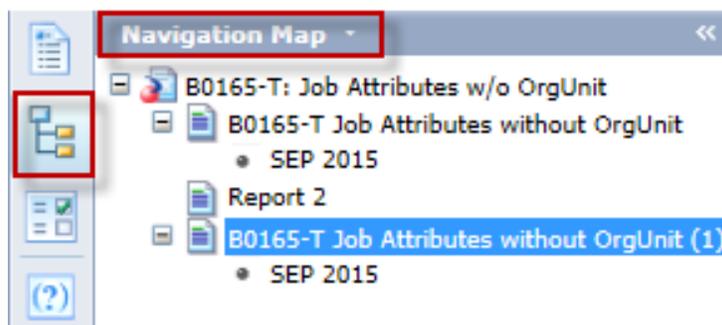
• **Zoom:**  - allows you to zoom in or out on the document.

Navigation Panel

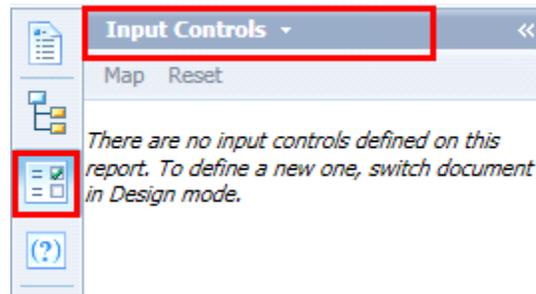
- **Document Summary** - provides information about the report you are viewing, such as the type, author, refresh date, document and data options, and Parameters (Prompts)?



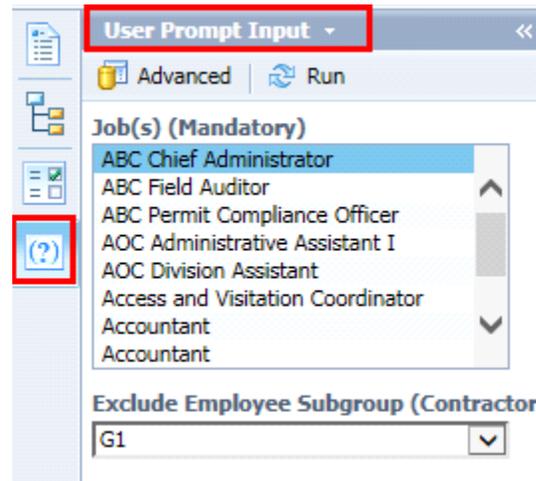
- **Navigation Map** - allows you to navigate between sections and tabs of the report.



- **Input Controls** - allows you to add and edit input controls applied to the document and is only available in Design mode. Input Controls are unique to the report selected. This feature will be covered during the instructor led WEBI Design course.



- **User Prompt Input** - reflects the prompts that you selected when you launched your report.



SUMMARY

In this lesson, you learned to:

- Understand the definition of Web intelligence (WEBI) - Reading Mode
- Open and view a Web Intelligence Report

BOBJ410 - Business Objects - Web Intelligence Design Mode

Introduction

Lesson 1: Business Objects Definitions and Launch Pad

Lesson 2: Dashboard Reports

Lesson 3: Crystal Reports

Lesson 4: Web Intelligence - Reading Mode

Lesson 5: Web Intelligence- Design Mode

Lesson 6 Course Review

Objectives

- Open a WEBI report and change to design mode to analyze and explore data
- Add Columns and Variables to WEBI Reports
- Add Tables and Charts to WEBI Reports
- Save a WEBI report to My Favorites Folder for future access
- Create a Variant

Design Mode

Design mode expands the Web Intelligence interface. Design mode allows you to explore and analyze reports. This mode has additional functions available such as the Report Element tab, the Formatting tab, the Data Access tab, the Analysis tab and the Page Setup tab. Design mode is used when creating a Web Intelligence document. Many interface elements are only available in this mode.

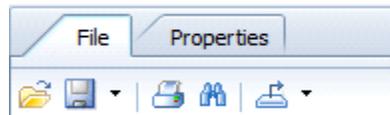
Open the B0165-T report from the _Training folder in the Public Drawer. Select at least 50 values in the prompts box to add to the report. Once the report is open, click on the Design mode icon located in the top right of the toolbar .

Toolbars

- **Edit Toolbar:** provides access to standard functions such as Undo, Redo, Cut, Copy, Paste and Refresh.

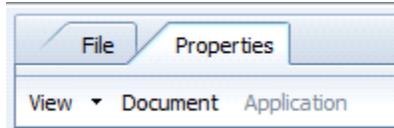


- **File Tab:** provides access to features for opening, saving, printing, searching, and exporting documents.

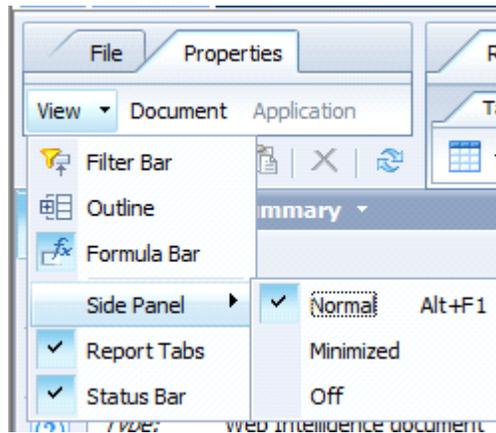


 Save -  - allows you to save a report in the My Documents drawers, My Favorites folder. It is very important to Save your report often while working in Design mode.

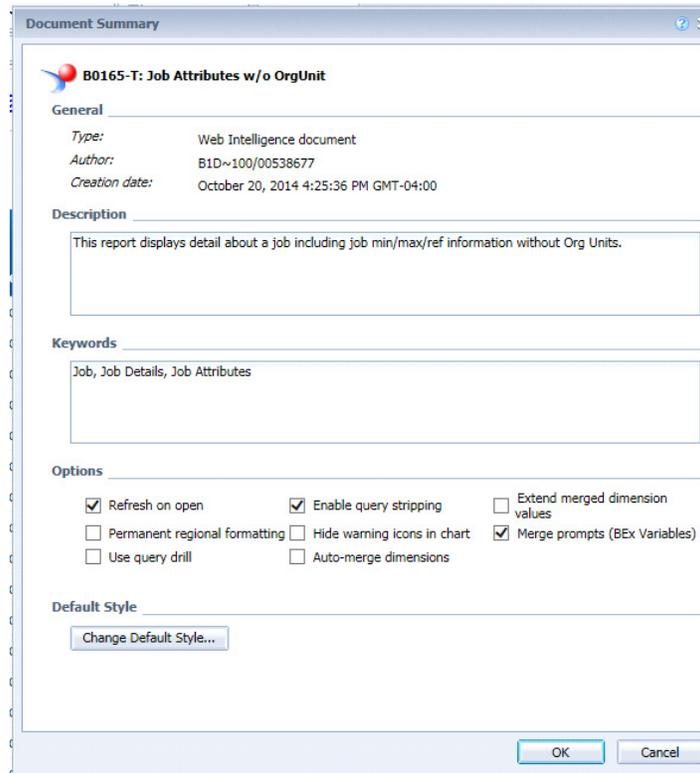
- **Properties Tab:** allows you to view or hide the various menu bars, as well as view and modify the properties of the current document and of the Web Intelligence application.



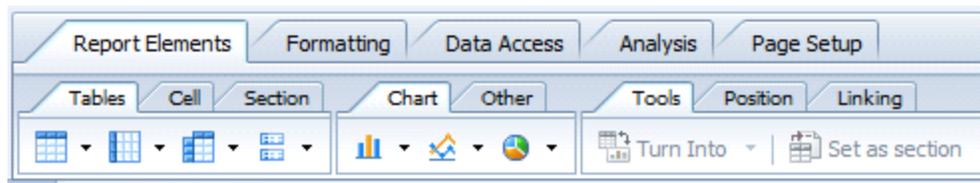
- **View:** allows you to view and hide the various menu bars such as Filter Bar, Outline, Formula Bar, Side Panel, etc.



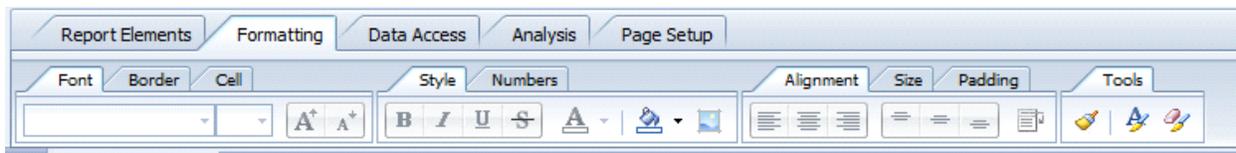
- **Document:** allows you to modify the current document properties such as Description and Keywords.



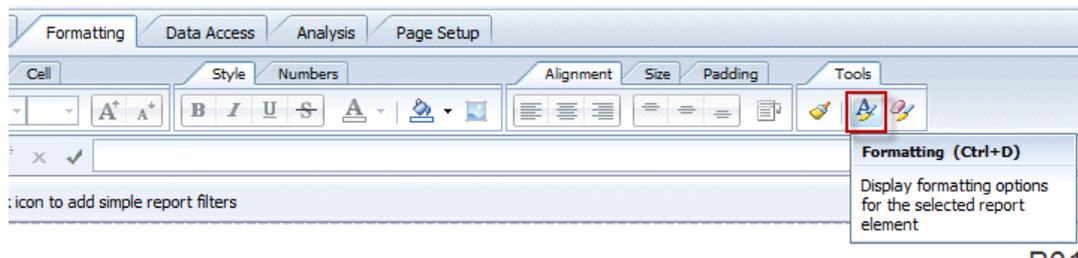
- **Report Elements Tab:** allows access to functions for inserting and modifying various report elements such as tables, cells, sections, and charts. The tab gives you control over the layout of these elements:



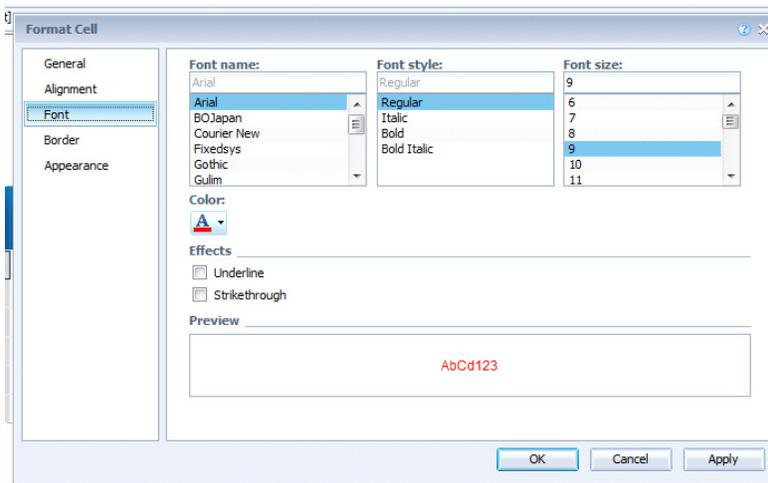
- **Formatting Tab:** allows you to format individual cells, column headings, and columns or rows of data. You can also copy the formatting from one cell to another..



1. Click on Formatting tab, Tools sub-tab, and Formatting option - after selecting a cell(s) on a report to set and change formatting to the text. Note that selecting any cell in a table will select the entire column.



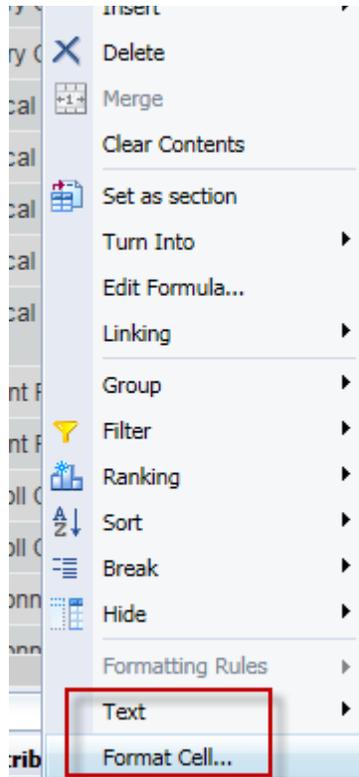
2. The following Format Cell Box will open for you to make your selections:



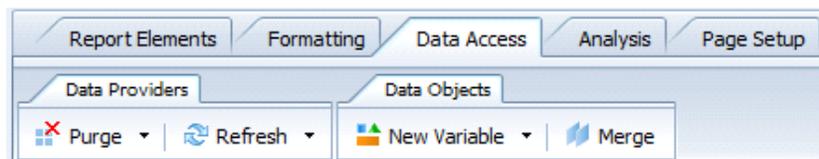
- * **General tab** - provides options for changing the overall size and display settings for the cell(s)
- * **Alignment tab** - enables you to define cell alignment and padding, and to wrap text or merge cells.

- * **Font tab** - allows you to change the format of the font in the selected cell(s).
- * **Border tab** - enables you to adjust the lines around the selected cell(s).
- * **Appearance tab** - provides options for changing the cell background using colors or images. You can choose a predefined color or create their own custom color.

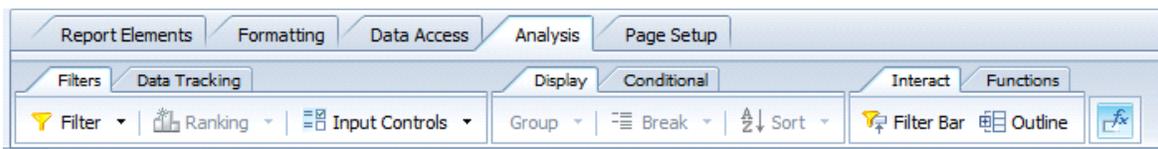
 You may also right click in a field to open the pop up window with options available from the various menus to use:



- **Data Access Tab:** allows user to refresh data and create new variables. The Purge and Merge functions are advanced features and will not be covered at this time..



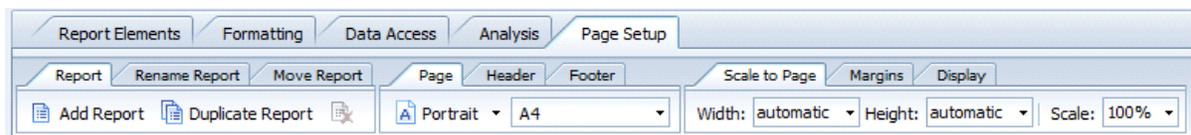
- **Analysis Tab:** allows you to work with and examine the data in your report. You can apply filters, database ranking, input controls, data tracking, breaks, sorts, format rules, and simple arithmetic functions to your data. The Ranking, Data Tracking and Outline functions are advanced features and will not be covered at this time.



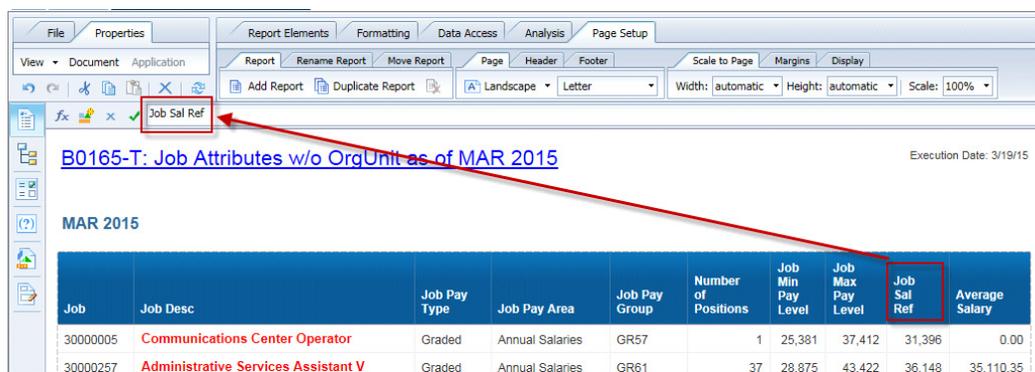
Interact Sub Tab: allows you to enable Filter Bar and Outline Mode. These features are also available in Reading Mode:



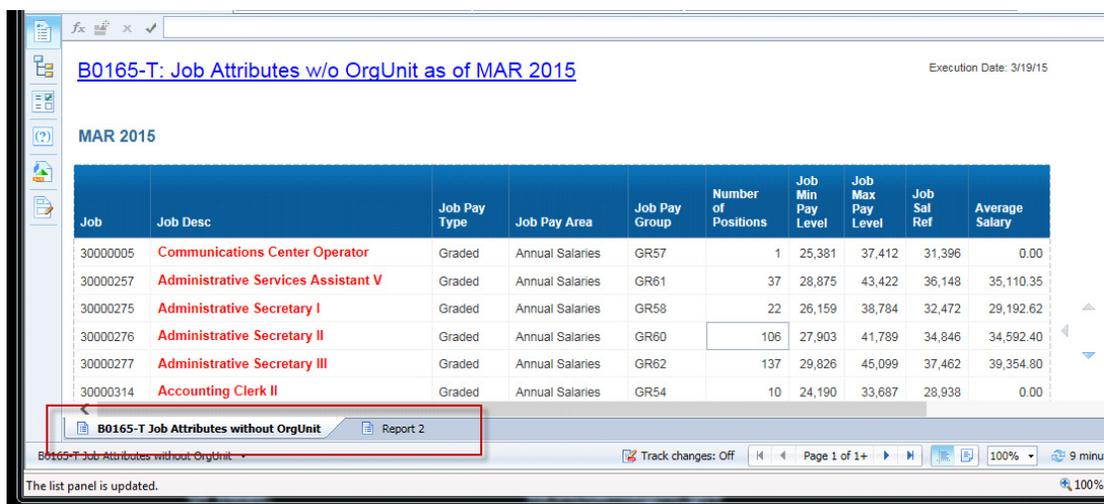
- **Page Setup Tab:** allows you to manage reports and prepare them for output. You can add, rename, and move reports; set up the paper orientation and dimensions; and format headers, footers, margins, and report scaling. You can also apply limits on the number of rows or columns for output.



- **Formula Bar:** Contains functions for creating and editing formulas and variables. You can use formulas to create custom calculations for use in your reports. Variables allow you to save and name formulas for easy re-use. The Formula box displays the formula language for the currently selected cell.



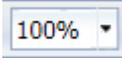
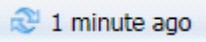
- **Report Panel:** displays the report. At the bottom of the Report Panel is a separate tab for each report contained in the active document. You can switch between reports by clicking the tabs.



Status Bar

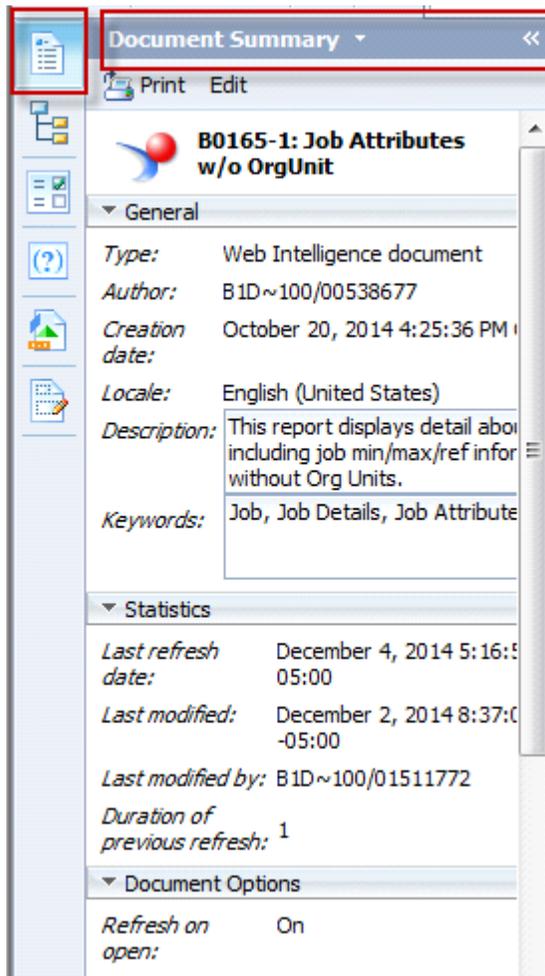
At the bottom of the report page is the Status Bar. It allows you to enable data tracking (available at a later date), navigate the pages in the report, change display mode, modify screen magnification, and refresh the report data.



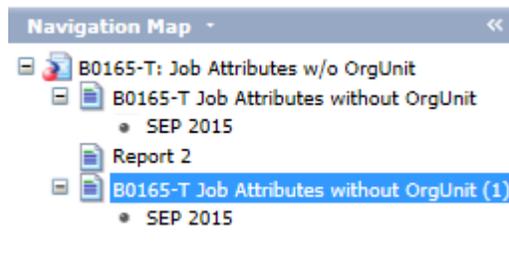
- Navigation:**  - shows the current/total pages of the document. It allows you to move through the pages of a document. If there is a + sign next to the second page number, this indicates the report is more than one page. Use the arrows to navigate to other pages (First page, Previous Page, Next Page, and Last Page) or if you click on the "Page 1 of 1+" text, you will be able to enter a page number for direct navigation.
- Display Options:**  - allows you to toggle between Quick Display mode and Page mode. Page mode gives you a preview of how it would look when printed. You must be a Quick Display mode when you use the Freeze functionality in Reading mode.
- Zoom:**  - allows you to zoom in or out on the document.
- Refresh Button:**  - shows the last date and time the report was refreshed with the latest data. Click on the Refresh icon to trigger a new refresh.

Navigation Left Side Panel

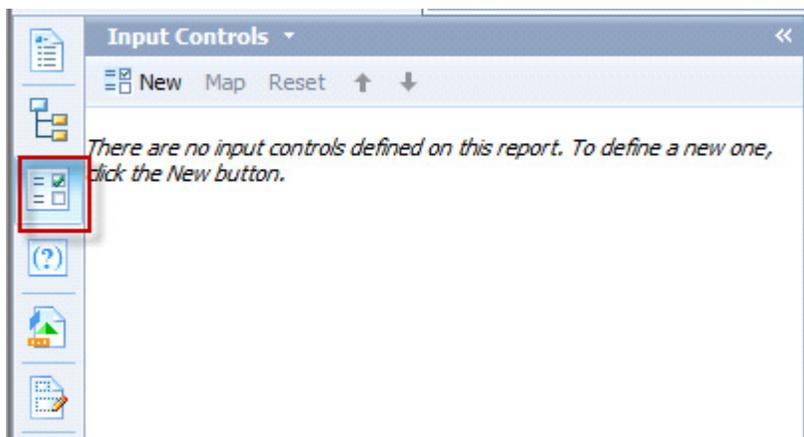
- **Document Summary Panel:** displays information about the document properties, such as the author, refresh date, document and data options, and parameters.



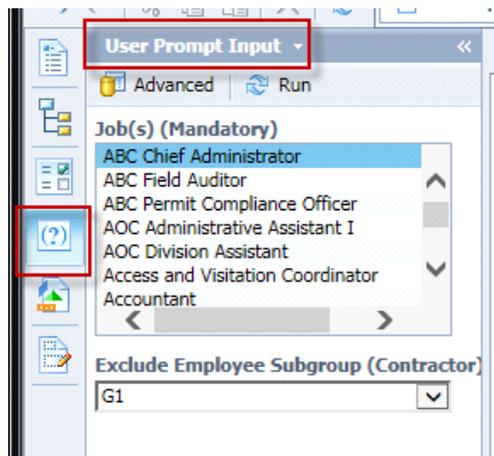
- **Navigation Map:** allows you to see an outline of all reports and elements within the document.



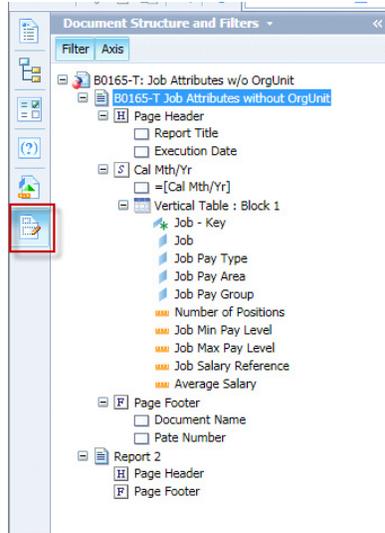
- **Input Controls Panel:** allows you to add and edit input controls applied to the document. Input Controls (interactive filters) are report-specific. We will go over these in more detail at the end of the session.



- **User Prompt Input Panel:** Reflects the prompts that you selected when you launched your report. The selected items are shown in this area:



need to expand the sections to see all of the filters and other details. Pre-existing report filters can be edited and you can add additional ones as well.



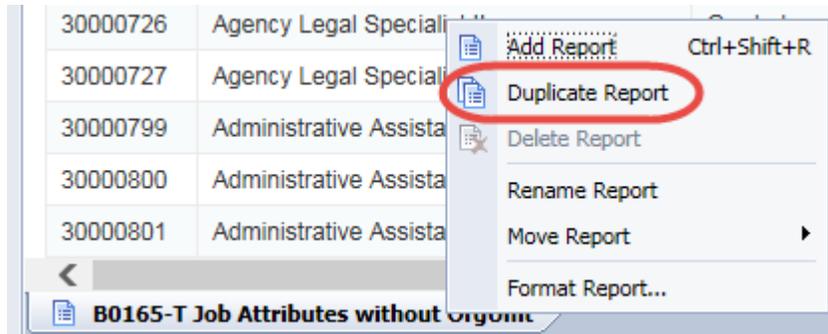
Adding Objects to a report

Run the B0165-T WEBI Report from the _Training folder. Select a range of Jobs to include in your report.

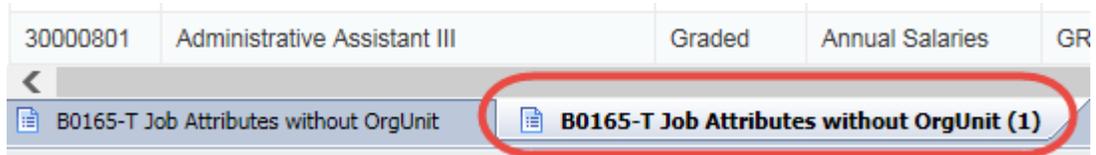
Once the report is open, we are going to add an object to the report and then we are going to add a formula and variable. We will also format the new column data.

-  It is good practice to first make a duplicate copy of a report before making major modifications. This way, if the changes go badly, you still have the original version of the report.

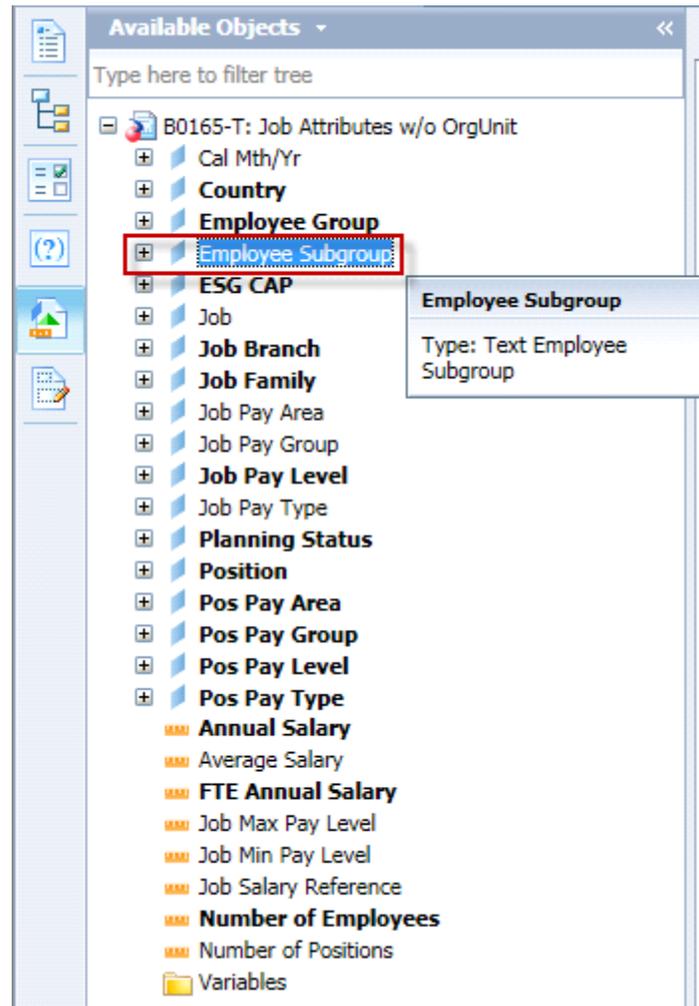
1. Change to Design Mode. 
2. First let's duplicate the Report 1 tab by right clicking on the Report 1 tab and selecting Duplicate Report in the pop-up menu. You may also click on the Page Setup tab, Report sub-tab and Duplicate option.



-  An exact copy of the Report 1 tab is added to the document and is now the active report. You can rename the tab by right clicking on tab and select Rename Report from the menu or you can double click on the new report tab and type the new name.



3. Click on the Available Objects button to show the list of available objects to select from. In this exercise, add the Employee Subgroup Text object to the report.



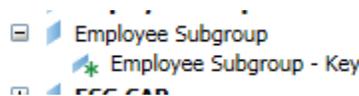
- To add the object to the report, left click on the object title and drag it to the report. You

will notice a rectangle icon  moving along with the mouse cursor indicating to drop here to insert cell.



The screenshot shows the Business Objects Design Mode interface. On the left is a tree view containing 'Employee Group' and 'Employee Subgroup' (highlighted with a red box). Below it are other categories like 'ESG CAP', 'Job', 'Job Branch', 'Job Family', 'Job Pay Area', 'Job Pay Level', 'Job Pay Type', 'Planning Status', 'Position', 'Pos Pay Area', and 'Pos Pay Group'. On the right is a report table for 'MAR 2015'. The table has columns: Job, Job Desc, Job Pay Type, Job Pay Area, Group, Number Positions, Job Min Pay Level, and Job Max Pay Level. A red box highlights the 'Employee Subgroup (Drop here to insert cell)' icon over the 'Job Pay Area' column. Below the table, a small snippet of the expanded tree view shows 'Employee Subgroup' and 'Employee Subgroup - Key'.

- There is a + beside the Employee Subgroup. This means there is additional information under the heading. If you click on the + to expand the selection you will see:



The screenshot shows the expanded tree view. 'Employee Subgroup' is selected and expanded, showing a sub-entry 'Employee Subgroup - Key' with a green asterisk icon next to it.

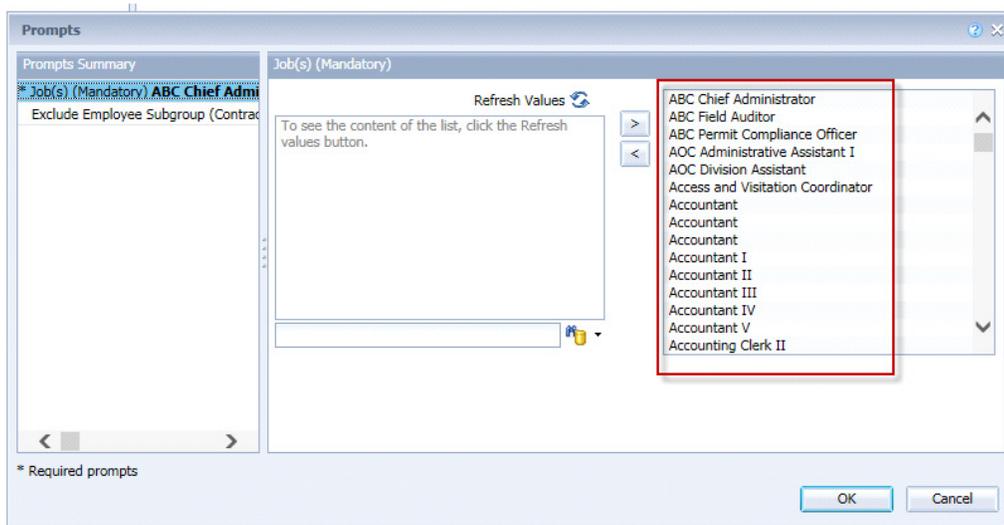
Notice that the expanded entry indicates - Key. The main selection is a text field and the Key selection is the key field information. Notice the difference in the two that were added to the report:

Job Desc	Employee Subgroup	Employee Subgroup - Key	Job Pay Type	Job
Administrative Services Assistant V	FT S-FLSAOT Perm	B1	Graded	An
Administrative Services Assistant V	PT S-FLSAOT Perm	Y1	Graded	An
Administrative Services Assistant V	Temp Sol FT S-FLSAOT	GD	Graded	An

- Once the Employee Subgroup - Text object has been added to the report, the field value will reflect: #REFRESH. You will then click on the refresh button to update the report with the added object information.

Job	Job Desc	Job Pay Type	Employee Subgroup	Job Pay Area
30000185	Asst Dir For Disability Determination	Graded	#REFRESH	Annual Salari
30000257	Administrative Services Assistant V	Graded	#REFRESH	Annual Salari
30000275	Administrative Secretary I	Graded	#REFRESH	Annual Salari

- When you click the Refresh button, it will bring the Prompts dialog box back up. If you are not adding any additional prompts to the report (your original list will show), click OK to refresh the data.



30000318	Accounting Clerk IV	SH	H	Annual Salaries	GR59
30000319	Accounting Clerk V	#REFRE SH	#REFRES H	Annual Salaries	GR61

- Once the data has refreshed, you will see the values in the column on the report.

Job	Job Desc	Job Pay Type	Employee Subgroup	Job Pa
30000185	Asst Dir For Disability Determination	Graded	FT N-FLSAOT Perm	Annual
30000257	Administrative Services Assistant V	Graded	FT S-FLSAOT Perm	Annual
30000257	Administrative Services Assistant V	Graded	PT S-FLSAOT Perm	Annual

- When dragging and dropping, you may see the message inside the rectangle icon change to drop here to replace or insert cell. If you are dragging an object and dropping near an existing column, you must carefully read the rectangle icon message. If your icon reads replace cell, it means it is replacing the current column. If the icon reads insert cell, you are inserting either before or after the cell depending on your cursor location.
- Dimensions may be placed behind measures in a report.

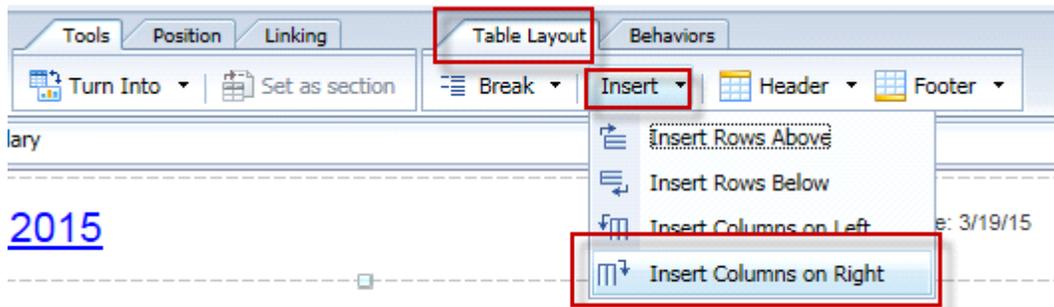
Adding Columns, Creating Formulas, and Creating Variables

We are going to add a column to grant a 10% increase to the Job Sal Ref column and then add another column to show how to use a variable to add the 10% increase to the Job Sal Ref value for the new total Job Sal Ref value.

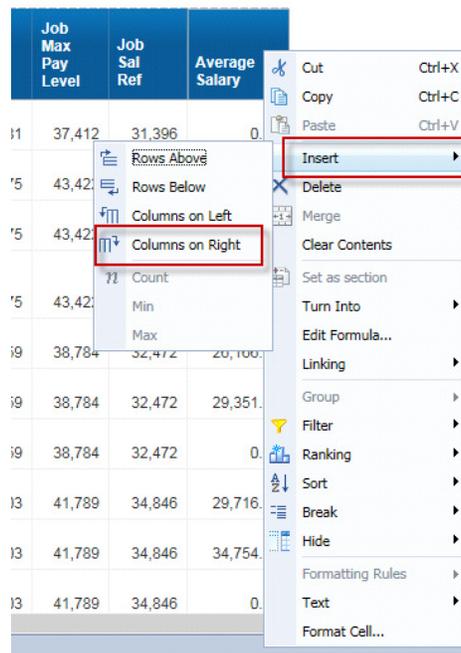
Adding Columns

In Web Intelligence - Design Mode, you can add a column to a table by dragging an available object to the desired insert location or by right-clicking a cell beside, above, or below where you want to insert the column.

1. Click in the last column of the report - Average Salary - to select the column. Either on the Report Elements tab, go to Table Layout sub-tab and click on the drop down arrow beside Insert and select Insert Columns on Right or right click and select Insert, Columns on Right.



or

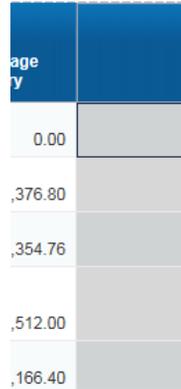


2. The blank column will be added to the report.

Creating a Formula

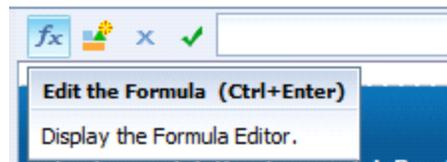
Web Intelligence - Design Mode enables you to create custom formulas to calculate values that are not stored in your data source.

1. Click in the first cell under the header row to highlight the new column you just added to your report.



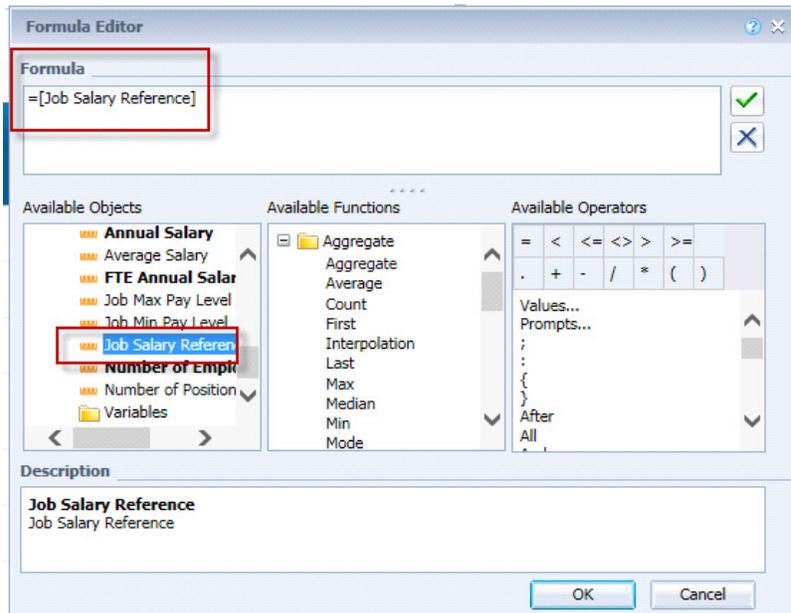
A screenshot of a report table. The first column has a header row with the text 'age' and 'y' (partially visible). Below the header, there are five data rows with values: 0.00, ,376.80, ,354.76, ,512.00, and ,166.40. The first cell in the first data row is highlighted with a blue background.

2. Click on the Edit the Formula button or right click and select Edit Formula:

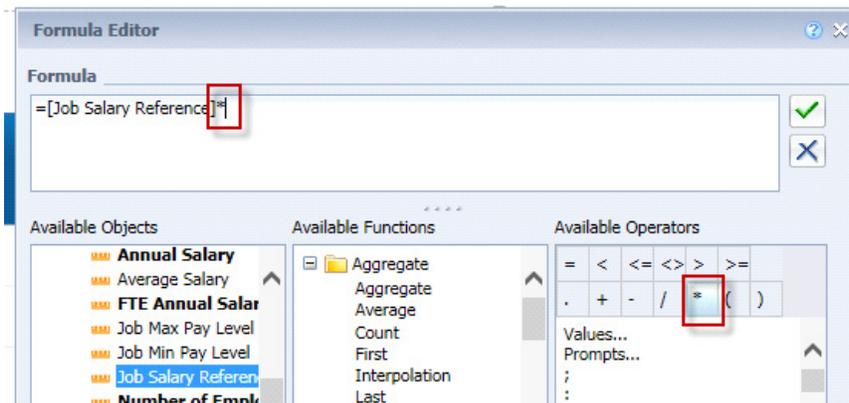


3. In the Formula Editor box, fill in the following values to construct the formula. You will be constructing the formula to calculate a 10% increase by multiplying Job Salary Reference by 10%.

- a Double click the Job Salary Reference measure to add it to the Formula box. Note that objects are always surrounded by square brackets in a formula, and that the equal sign that designates a formula is automatically added when you add the first object.



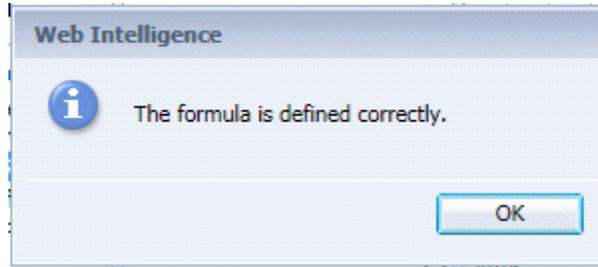
- b Single click on the appropriate Available Operator - in this exercise select the asterisk (*) since we are multiplying.



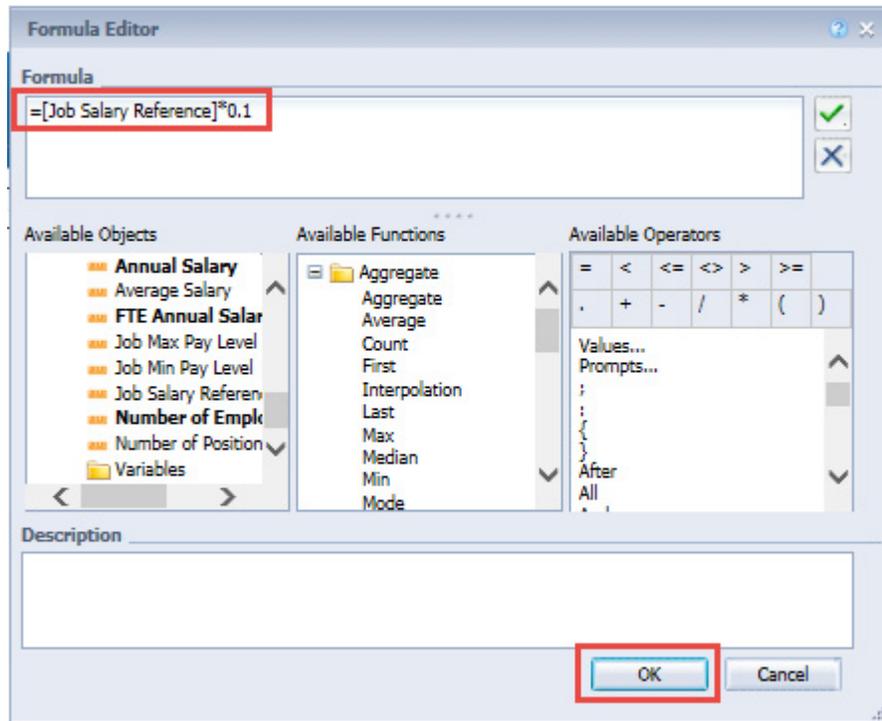
- c Click in the Formula box beside the * and enter 0.10 - this is the 10% increase we want to base off of the Job Salary Reference value. Once you have entered the formula, you need to validate it to ensure that the syntax is correct by clicking the green check mark..



d Click OK



e Click OK to close the Formula Editor



f The calculation now displays in the new column.

Job Sal Ref	Average Salary	
31,396	0.00	3,139.6
36,148	31,376.80	3,614.8
36,148	35,354.76	3,614.8
36,148	34,512.00	3,614.8
32,472	26,166.40	3,247.2

- To add a title to the column, click in the column header area of the new column. Enter the title for the column in the cell formula bar text box and click the green check or you may double click in the column header and press enter once you have typed the title.

The screenshot shows a report window with a formula bar at the top containing a green checkmark and the text "10% Increase". Below the formula bar, the report title is "gUnit as of MAR 2015" and the execution date is "3/19/15". The table below has the following columns: Job Pay Type, Employee Subgroup, Job Pay Area, Job Pay Group, Number of Positions, Job Min Pay Level, Job Max Pay Level, Job Sal Ref, Average Salary, and 10% Increase. The 10% Increase column is highlighted with a red box.

Job Pay Type	Employee Subgroup	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	10% Increase
Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR57	1	25,381	37,412	31,396	0.00	3,139.6

- You will see your new title displayed in the column.

Creating a Variable

If you have created a formula that you may want to apply more than once, you can save the formula as a variable to make it re-usable.

1. Click on the 10% Increase column to set as a variable and then click on the Variable icon on the formula bar.

	Job Pay Type	Employee Subgroup	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	10% Increase
	Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR57	1	25,381	37,412	31,396	0.00	3,139.6
V	Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR61	2	28,875	43,422	36,148	31,376.80	3,614.8
V	Graded	FT S-FLSAOT Perm	Annual Salaries	GR61	34	28,875	43,422	36,148	35,354.76	3,614.8

2. You will need to define a unique name for the variable, which will appear in the list of Available Objects. Name the variable in the Name text box to populate it and click OK.

Create Variable

Definition

Name: Type:

Qualification:

Formula

Available Objects

- B0165-T: Job Attri
- Cal Mth/Yr
- Country
- Employee Gr

Available Functions

- Aggregate
- Aggregate
- Average
- Count
- First
- Interpolation

Available Operators

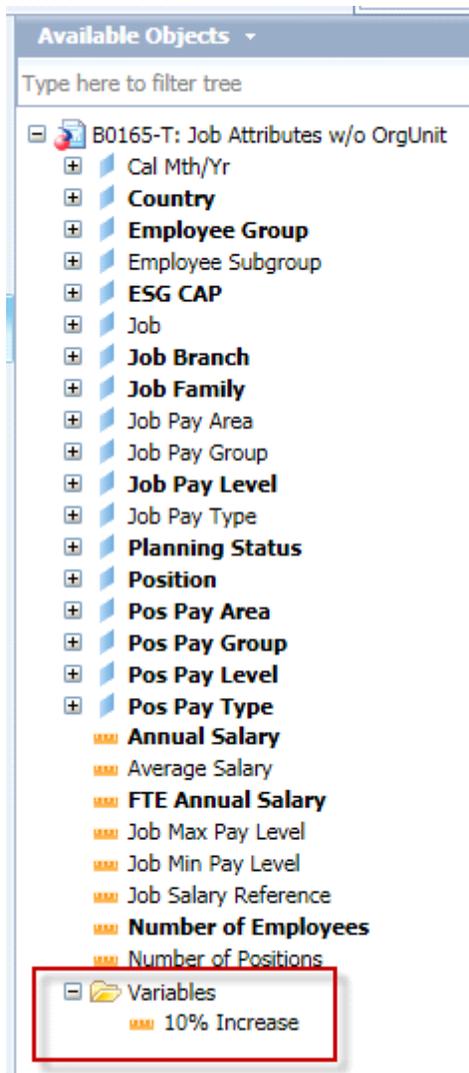
= < <= <> > >=

. + - / * ()

Values... Prompts...

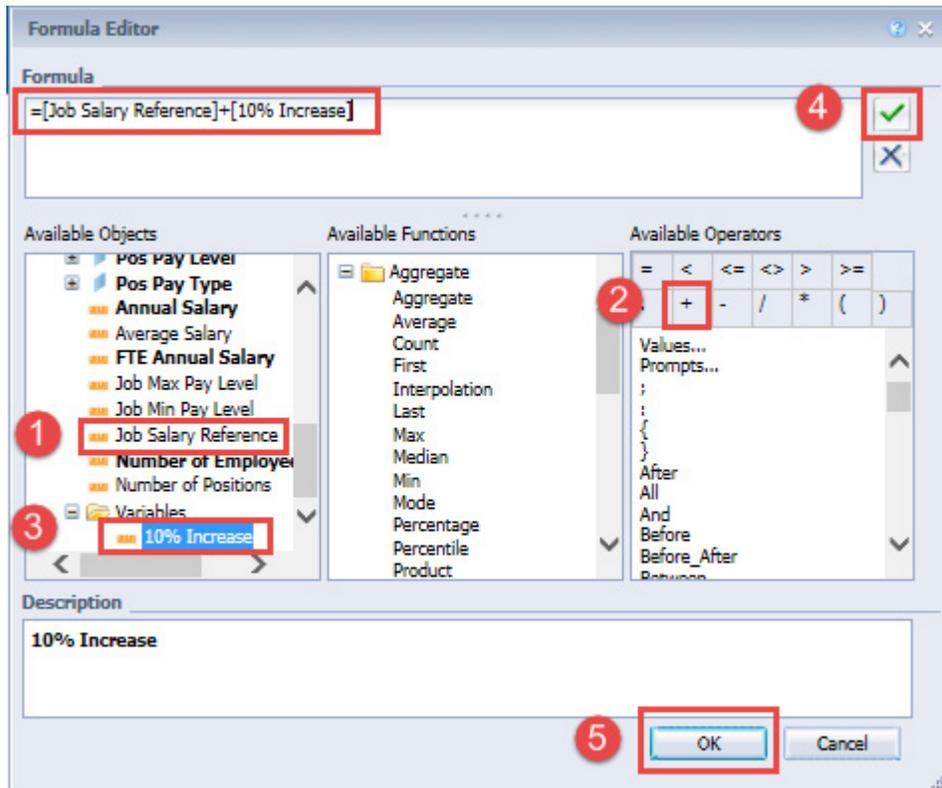
Description

- The name of the variable will now appear in the Variable folder in the Available Objects panel. You can now select it when building formulas, etc.



- Add another column to the far right of your report beside the 10% Increase column.

5. Add a formula using the variable just created to add the 10% increase to the Job Sal Ref column. Click in the top blank cell of the new column, then click on the Edit the Formula icon. See the screen shot below for the formula set up.



6. Once you have clicked OK, you will now see that the value of the Job Sal Ref column has been added to the 10% Increase column to give you a new value reflecting the total of the two columns.

	Job Sal Ref	Average Salary	10% Increase	
2	31,396	0.00	3,139.6	34,535.6
2	36,148	31,376.80	3,614.8	39,762.8
2	36,148	35,354.76	3,614.8	39,762.8
2	36,148	34,512.00	3,614.8	39,762.8
4	32,472	26,166.40	3,247.2	35,719.2

7. Add a title to the last column. In this exercise, title the column Job Sal Ref plus 10% Increase Total.

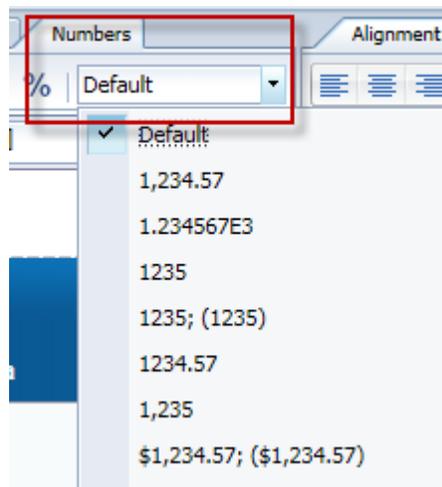
Job Pay Type	Employee Subgroup	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	10% Increase	Job Sal Ref plus 10% Increase Total
Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR57	1	25,381	37,412	31,396	0.00	3,139.6	34,535.6
Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR61	2	28,875	43,422	36,148	31,376.80	3,614.8	39,762.8
Graded	FT S-FLSAOT Perm	Annual Salaries	GR61	34	28,875	43,422	36,148	35,354.76	3,614.8	39,762.8

Formatting Numbers

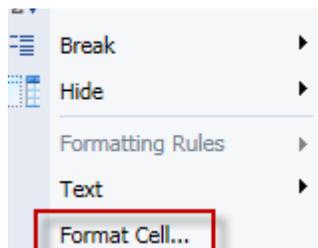
Web Intelligence - Design Mode enables you to adjust the text and number formatting of the values that appear in cells and tables in a report.

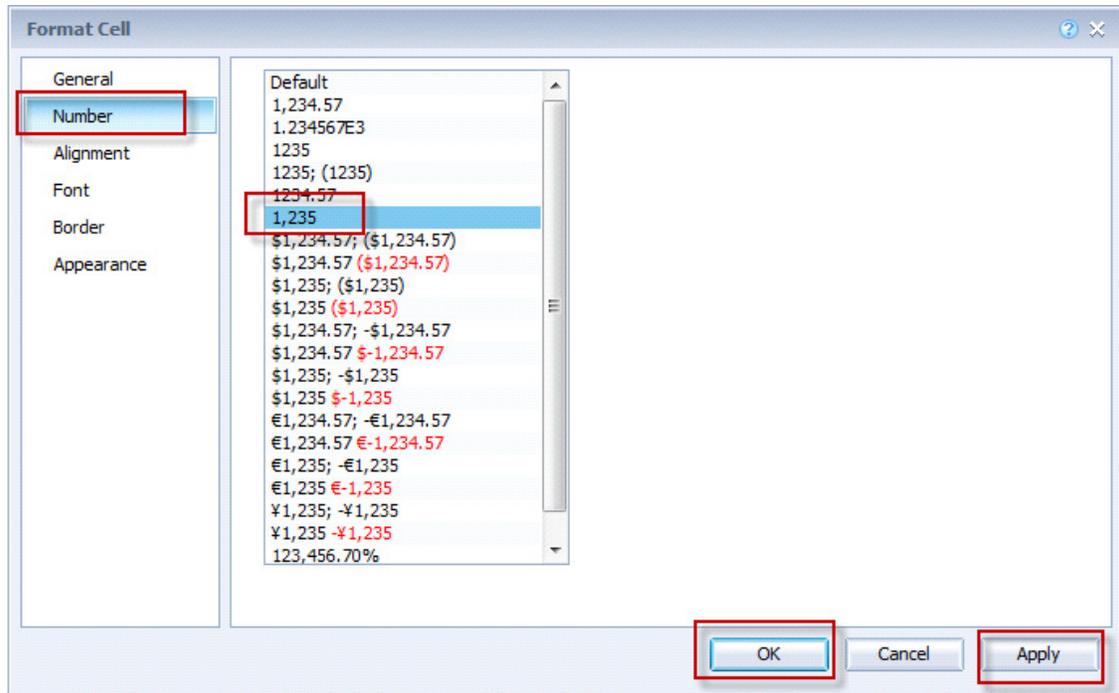
In this exercise you will change the number formatting for the cells in the columns you have just added.

1. Select both columns by clicking on the 10% column then click and hold the Control key on the keyboard and click on the Job Sal Ref plus 10% Increase Total column.
2. Click the Formatting tab, go to the Numbers sub-tab and choose from a set of predefined formats in the Number Format drop down menu or right click and select Format Cell and then number.



or





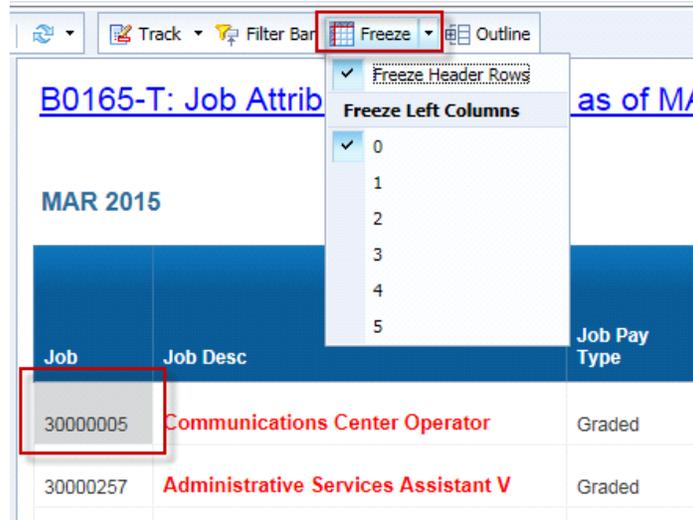
Freeze Columns/Rows

The Reading mode in BOBJ WEBI enables you to freeze column headers or a specific number of columns in a table to ensure that they remain visible as you scroll through the rest of the table. The Freeze functionality is not available in the Design mode.

For this demonstration we will Freeze the first 3 columns of our B0165-T report.

1. Click on the Reading Mode for the report.
2. Click in a data cell within your table in order to activate the Freeze icon.

- Click the drop down arrow beside the Freeze icon on the Toolbar.



- Select the number of columns to freeze from the drop down list. In this exercise select 3.
- Once you start to scroll to the right, you will see a dark gray line appear. The first three columns remain visible while you scroll through the additional columns of the table.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Ave Sala
30000005	Communications Center Operator	Graded	Annual Salaries	GR57	1	25,381	37,412	31,396	
30000257	Administrative Services Assistant V	Graded	Annual Salaries	GR61	2	28,875	43,422	36,148	3
30000257	Administrative Services Assistant V	Graded	Annual Salaries	GR61	34	28,875	43,422	36,148	3
30000257	Administrative Services Assistant V	Graded	Annual Salaries	GR61	1	28,875	43,422	36,148	3
30000275	Administrative Secretary I	Graded	Annual Salaries	GR58	2	26,159	38,784	32,472	2
30000275	Administrative Secretary I	Graded	Annual Salaries	GR58	19	26,159	38,784	32,472	2

- To remove the Freeze option, clear the Freeze Left Column check box or select 0 (zero) from the drop down list. This removes the Freeze panes and scrolls the entire report.

Freeze Header Rows is defaulted but you may unfreeze the header rows by clearing the Freeze Header Rows check box.

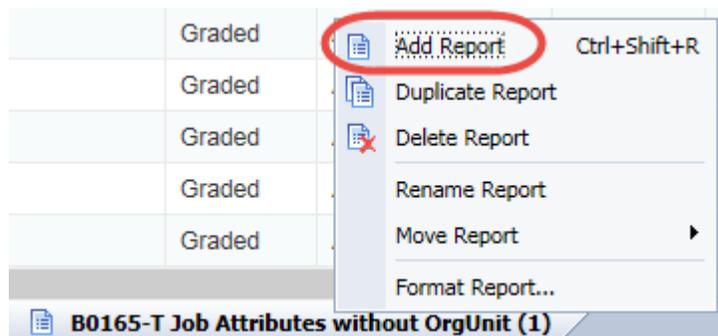
You must be in Quick Display Mode.

Creating a Table

In Web Intelligence - Design Mode, you can create a table by choosing a table layout and dragging and dropping object into the columns. Alternately, you can choose a table layout and define the columns using a dialog box interface. You will create a table using both methods.

Dragging and Dropping Method for Creating a Table

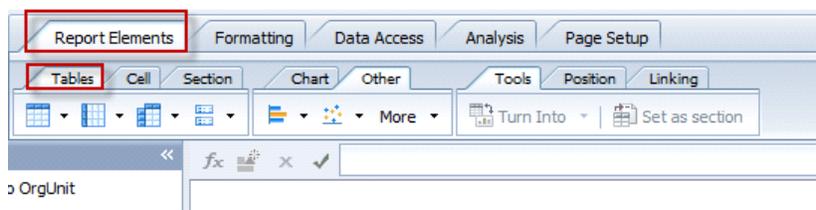
1. First add a new report tab to your report by clicking on the second report tab and selecting Add Report in the pop-up menu. You may also click on the Page Setup tab, Report sub-tab and Add Report option.



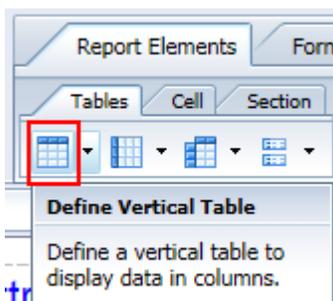
- ☞ You will see the Report 3 tab at the bottom of your report and a blank workspace. To rename the Report tab, double click on the new report tab and type the new name.



2. Now that a new report tab has been added - click on the Report Elements tab and select the Table sub-tab.



3. Click on the Define Vertical Table icon..

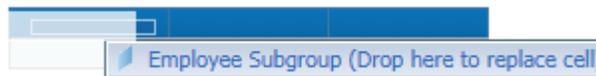


- Click in the Report Workspace Panel to insert a blank table. It is very important that you click in the Workspace area below the Header section.



- Click on the Available Objects panel to see the objects that you can add to the table.
- You must define the contents of the table by dragging the object to the table. In this exercise you will add the Employee Subgroup - Text, Position - Text, Job Salary Reference and Number of Position objects.

When you drag an object to a table, a highlight appears in the selected cell. Dropping an object when the center of the cell is highlighted inserts the object in the selected cell. Dropping an object when the left or right edge of the cell is highlighted adds a column to the right or left of the highlighted cell. Dropping an object when the top or bottom edge of the cell is highlighted adds a row above or below the highlighted cell. The system also provides prompts indicating your action.



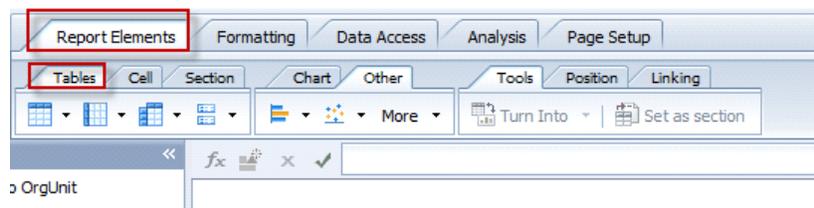
- Once all objects have been added to your table, you may have to click the Refresh icon in order for the data to be pulled in the table.

Employee Subgroup	Position	Job Salary Reference	Number of Positions
FT N-FLSAOT Perm	Accountant	59,342	1
FT N-FLSAOT Perm	Accountant	59,342	1
FT N-FI SAOT Perm	Accounting Manager	80,195	1

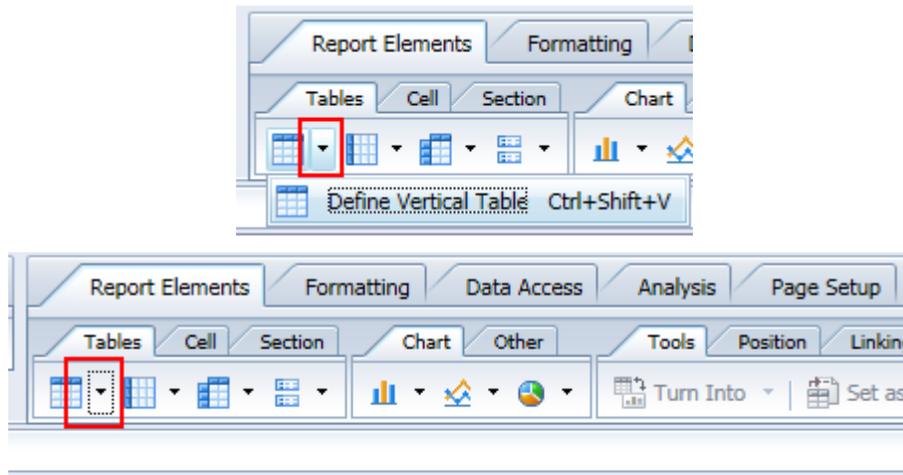
Choosing Table Layout Method for Creating Table

If you use the list option to insert the table, rather than clicking on the icon, a dialog box opens that you can use to define the parameters of the report columns.

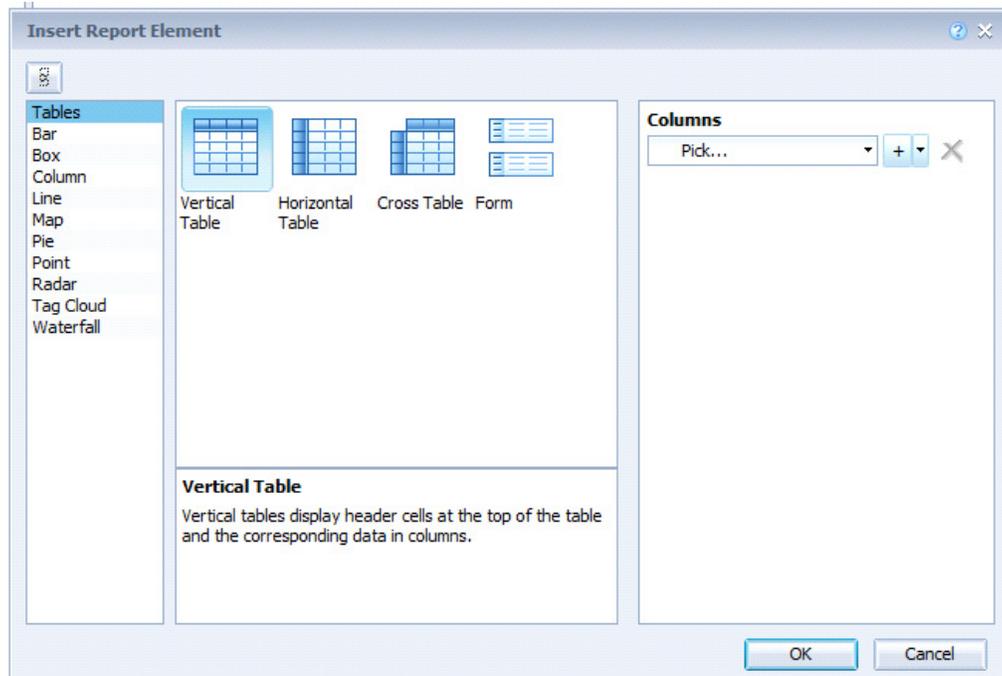
- First add a new report tab to your report by clicking on the Page Setup tab and selecting Add Report. You will see the Report 4 tab at the bottom of your report and a blank workspace. Note you may also right click on the current tab and select Add Report. To rename the Report tab, double click on the new report tab and type the new name.
- Click on the Report Elements tab and select the Tables sub-tab.



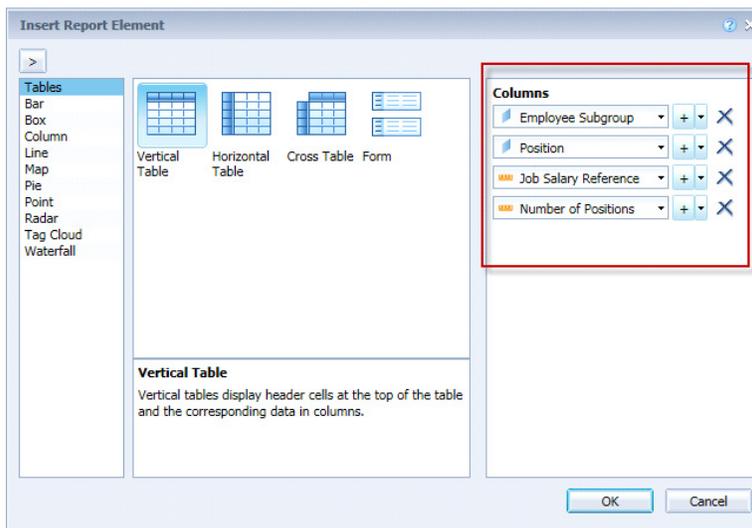
3. Click on the drop down arrow beside the type of table you wish to insert into your report. In this exercise you will select the first one to define a vertical table. Click on Define Vertical Table from the drop down.



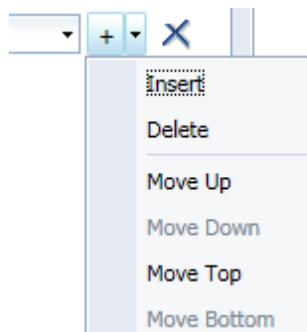
4. Click in the blank workspace to insert the table. The following dialog box will appear. It is very important to click in the Workspace area below the Header section.



- 5. On the right hand side, you will see Columns listed with a drop down arrow. Click on the drop down arrow and select the object from the list that you want added to the report. Note that there is a + option beside the selection box. Once you have selected the first object to add, you may add as many other objects as you wish by selecting the + and choosing from the list..



- Click on the X to remove a column if added in error. 
- Click the arrows next to the + option to change the placement of the columns (Move Up, Move Down, etc)



- 6. Once you have selected as many objects for your table as you wish, click OK. The table appears in the Report 4 tab. Note you may change the tab names by right clicking on the tab and selecting Rename or you may double click on the tab. You then enter the name you wish and press enter.

 You may have to click the refresh button . You added items to the table that were not part of the original report.

Employee Subgroup	Position	Job Salary Refere	Number of Positions
Temp Sol FT S-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
FT S-FLSAOT Perm	#REFRESH	#TOREFRESH	#TOREFRESH
PT S-FLSAOT Perm	#REFRESH	#TOREFRESH	#TOREFRESH
Temp FT S-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
FT N-FLSAOT Perm	#REFRESH	#TOREFRESH	#TOREFRESH
Temp FT N-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
Temp Sol FT N-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
FT S-FLSAOT TL	#REFRESH	#TOREFRESH	#TOREFRESH
Temp PT S-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
PT N-FLSAOT Perm	#REFRESH	#TOREFRESH	#TOREFRESH
Federal	#REFRESH	38,867	1
Temp PT N-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
Temp Sol PT S-FLSAOT	#REFRESH	#TOREFRESH	#TOREFRESH
FT EPA	#REFRESH	#TOREFRESH	#TOREFRESH
FT N-FLSAOT TL	#REFRESH	#TOREFRESH	#TOREFRESH

Employee Subgroup	Position	Job Salary Refere	Number of Positions
Temp Sol FT S-FLSAOT	Security Guard	32,472	1
Temp Sol FT S-FLSAOT	Administrative Assistant I	38,867	1
Temp Sol FT S-FLSAOT	Administrative Officer II	51,502	1
Temp Sol FT S-FLSAOT	WA Administrative Officer I	45,467	1
Temp Sol FT S-FLSAOT	Administrative Officer I	45,467	1
Temp Sol FT S-FLSAOT	Administrative Officer I	45,467	1
Temp Sol FT S-FLSAOT	Advocate I	47,384	1
Temp Sol FT S-FLSAOT	Administrative Assistant I	38,867	1
Temp Sol FT S-FLSAOT	Information & Communications Spl II	49,364	1
Temp Sol FT S-FLSAOT	Administrative Secretary III	37,462	1
Temp Sol FT S-FLSAOT	Administrative Officer I	45,467	1
Temp Sol FT S-FLSAOT	Administrative Services Assistant V	36,148	1
Temp Sol FT S-FLSAOT	Administrative Assistant I	38,867	1

Resizing Columns and Rows

While all of your columns fit on one page, you may want to change the column width.

Hover over the right border of the cell until you see a cross tab . Double-click on the right border of the cell or click of the right column border and drag to desired width.

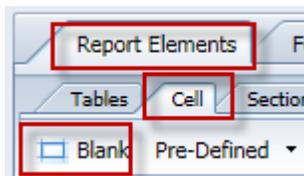
Adding a Header to a Table

Once you have created a table in your WEBI document, you may add a Header if you desire by inserting a blank cell in the Header section of your report.

1. Click on the Header section within the Workspace Panel.



2. Click on the Report Elements tab, select the Cell sub-tab and click on Blank.

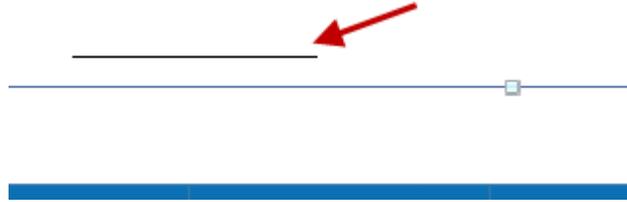


3. Click in the Header section to insert the blank cell. .



 Note you may need to increase the height of the Header by clicking on the node  located at the bottom of the Header and dragging down

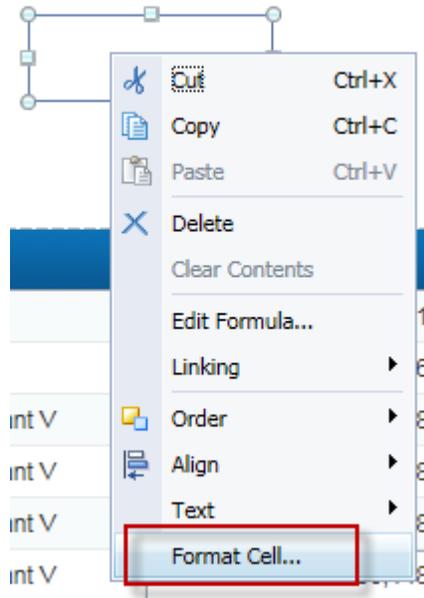
- The blank cell appears as a single line text box in your header.



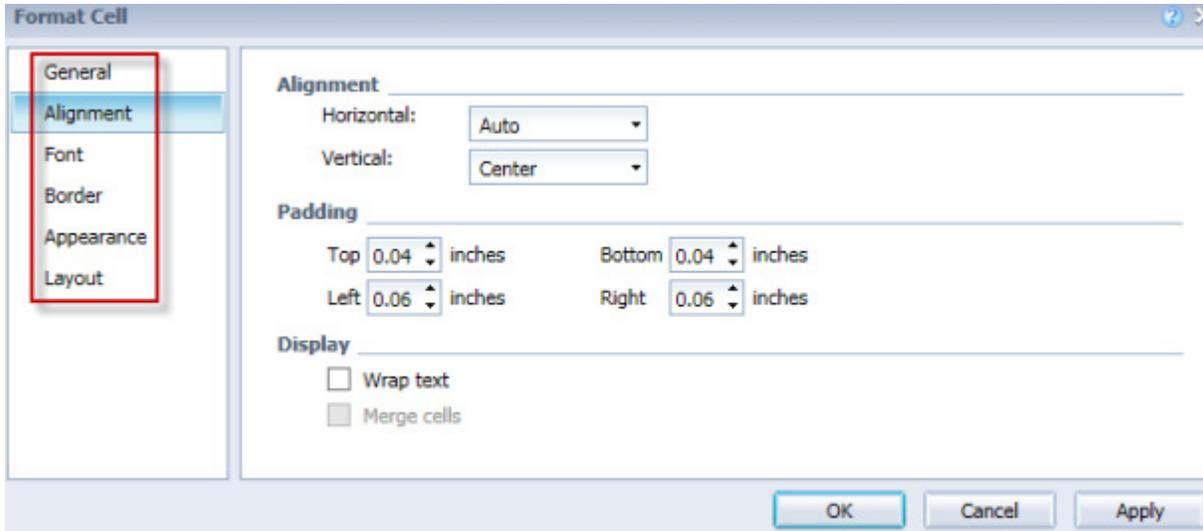
- Double click inside the blank cell and type the name you would like to display in the Header. Press enter to display the name of your table.



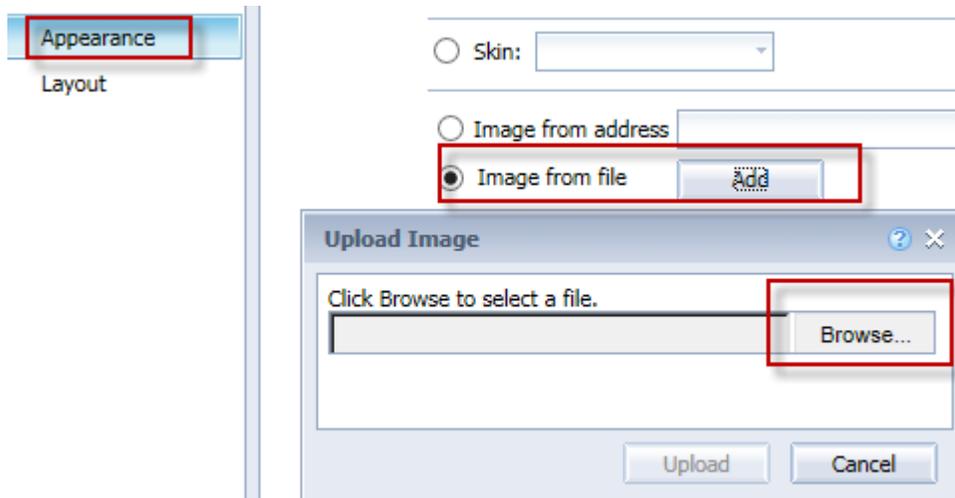
- To format the cell, right click in the cell and select Format Cell



- 7. You may change the General Size, Alignment, Font, Border, Appearance and Layout of the cell.



- To add an image to your report such as a logo, you must first add a blank cell to the report then right click on the blank cell and select Format Cell. Click on Appearance in the Format Cell box, select Image from file, click on Add to browse and select a file to be uploaded.



- 8. Click OK once you have completed formatting the cell(s) your header. Your formatted Header will display in your report.

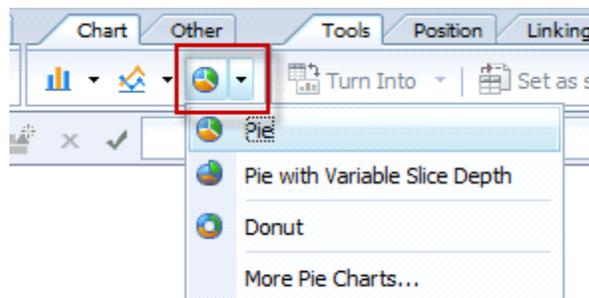


Table Header Name

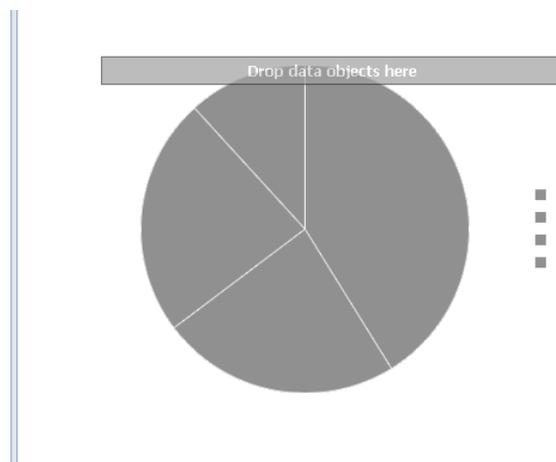
Adding a Chart to Report

Adding charts to Web Intelligence reports allow you to visualize the data.

1. First add a new report tab to your report by clicking on the Page Setup tab and selecting Add Report. You will see the Report 5 tab at the bottom of your report and a blank workspace. Note you may also right click on the current tab and select Add Report. To rename the Report tab, double click on the new report tab and type the new name. In this exercise, rename the tab to read Chart.
2. Click on the Report Elements tab and then the Chart sub-tab. In this exercise, you will add a Pie Chart. Select the drop down arrow beside the Pie Chart icon from the toolbar menu and select Pie:

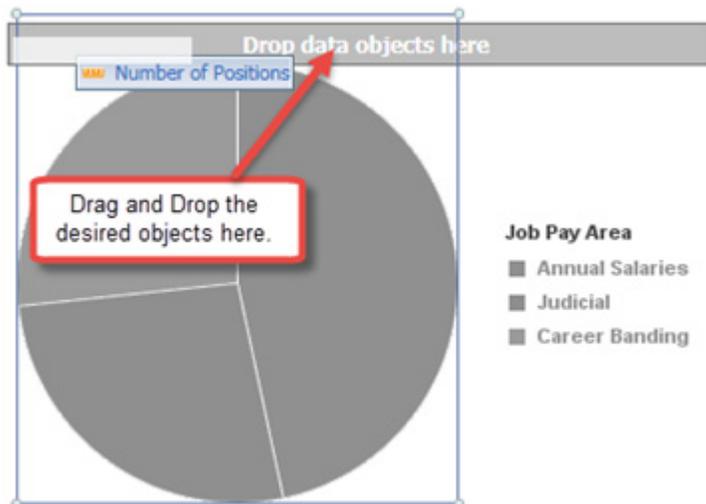


3. Click in the blank workspace to insert the Pie Chart into the report. The following object will appear. It is very important to click in the Workspace area below the Header section.



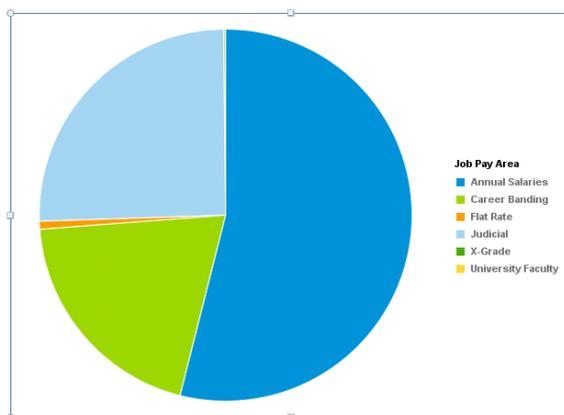
4. You must now choose the data you want to display in the chart. Open the Available Objects panel and drag and drop the desired objects directly onto the chart. Web

Intelligence automatically determines how to display the data based on the chart type you selected. For this report select Job Pay Area and Number of Positions.



You may have to click the refresh button in order to display the data in the chart.

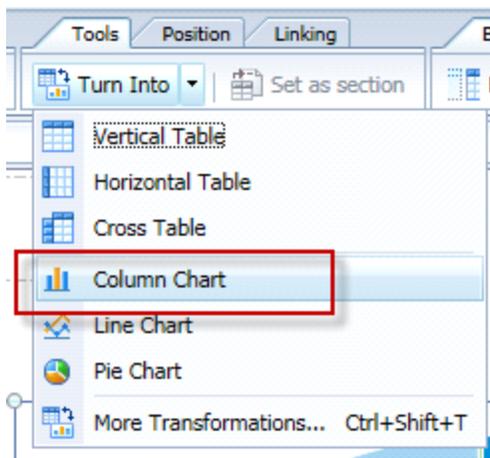
- The chart now reflects the data you selected. For the objects you selected in this exercise, you have determined that the Pie Chart is not the correct type of chart.



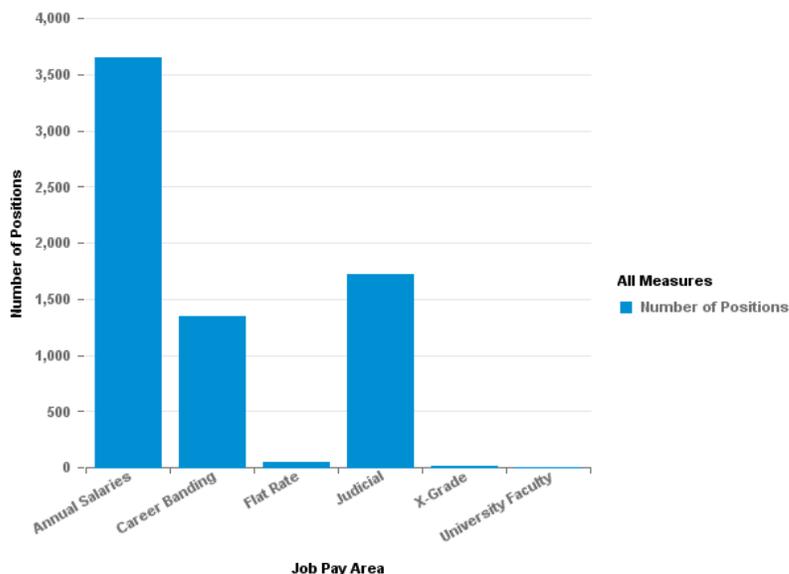
- Web Intelligence allows you to convert the Pie Chart into another type of chart. Click on the Tools sub-tab located under the Report Elements tab, click on the drop down arrow beside the Turn Into icon.



7. Select Column Chart for this exercise.



8. The Column Chart now reflects more meaningful data to view.

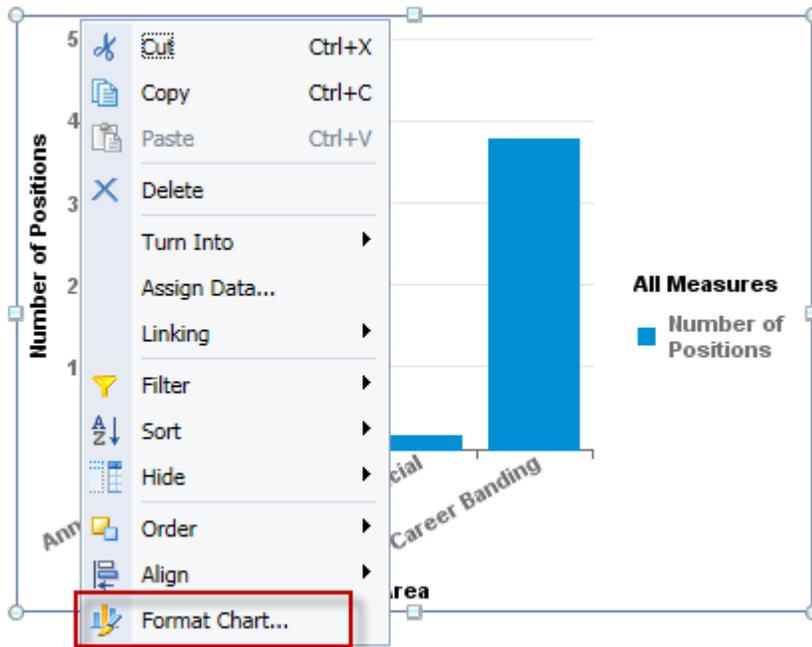


Adding a Title to a Chart

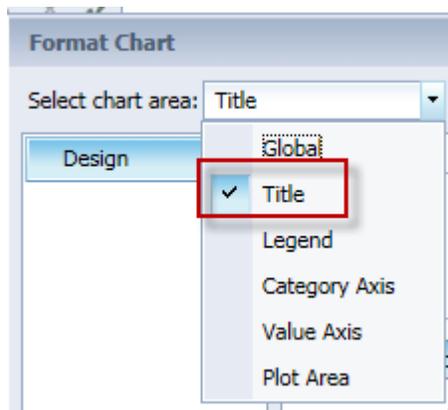
In Web Intelligence, you can add a title to a chart by using the Formatting tab, Chart Style sub-tab and clicking on the Format Chart icon . You can also right click and select Format Chart.

1. Select the chart by clicking on the border of the chart.

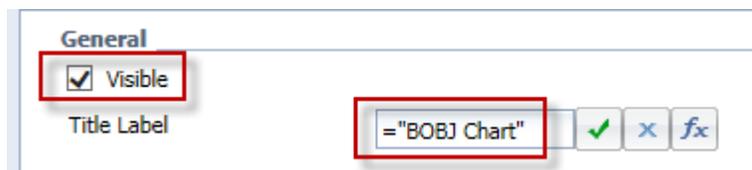
- Once the chart has been selected, right click and select Format Chart.



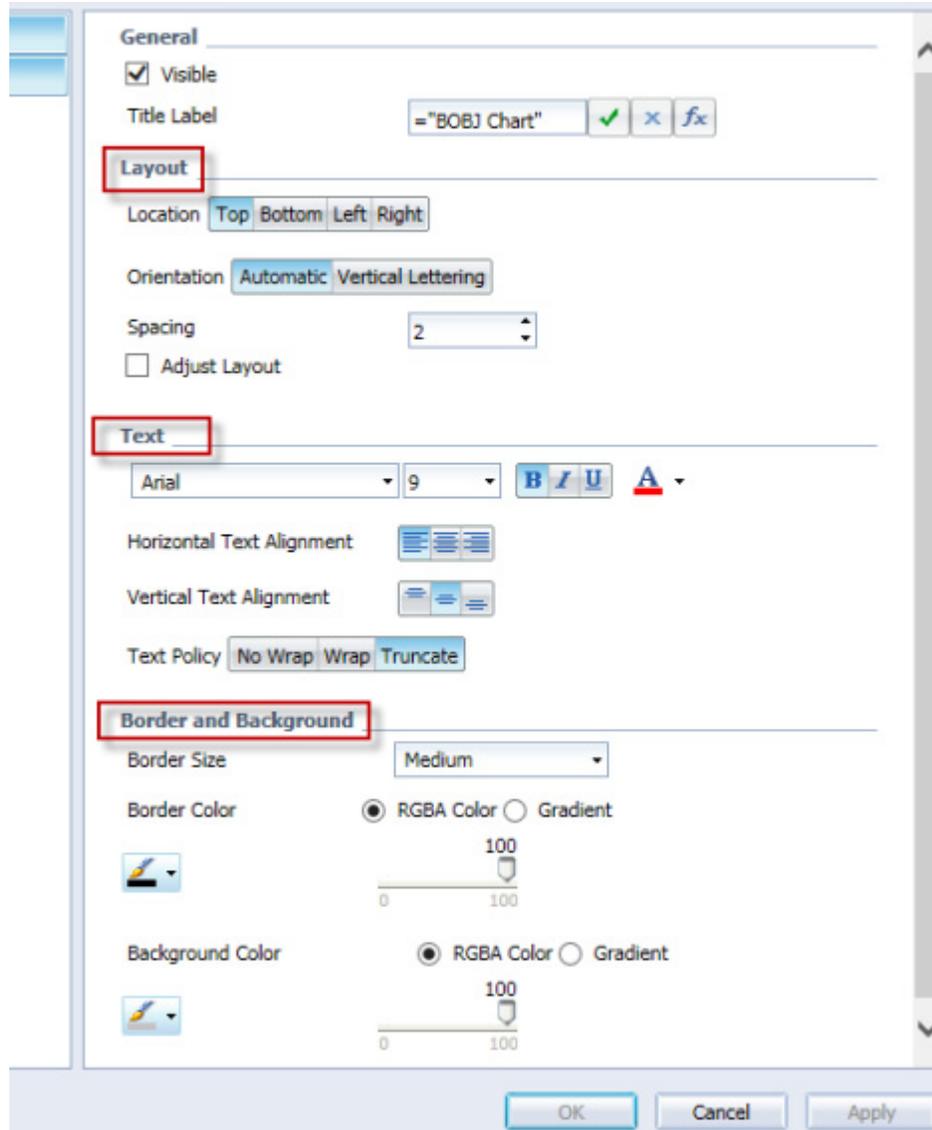
- Click on the drop down arrow beside Select chart area and select Title.



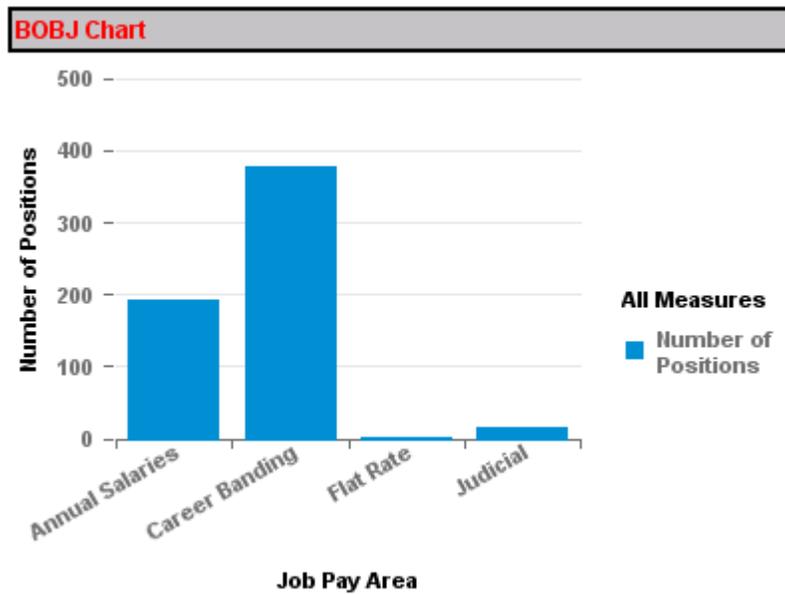
- Click on Visible located in the General section so that a check mark appears in the box in front of the word Visible. Visible must be checked in order for the title to display on your chart.
- Type your title between the quotations in the Title Label field. It is considered a formula; therefore, it is important that the equal sign and quotation marks are not deleted.



- You may change the Layout, Text, Border and Background of your title within the Format Chart function.



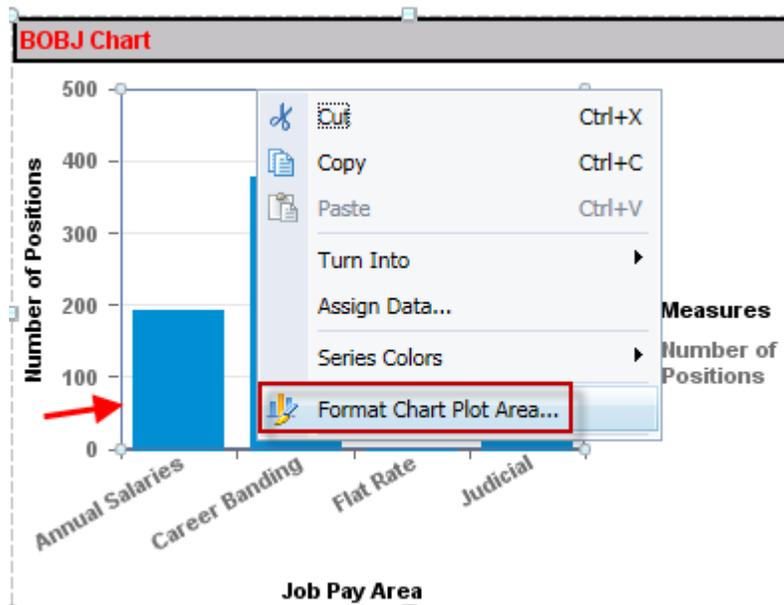
- Click Apply to see the title and make additional changes if necessary. Once you have completed the formatting, click OK.



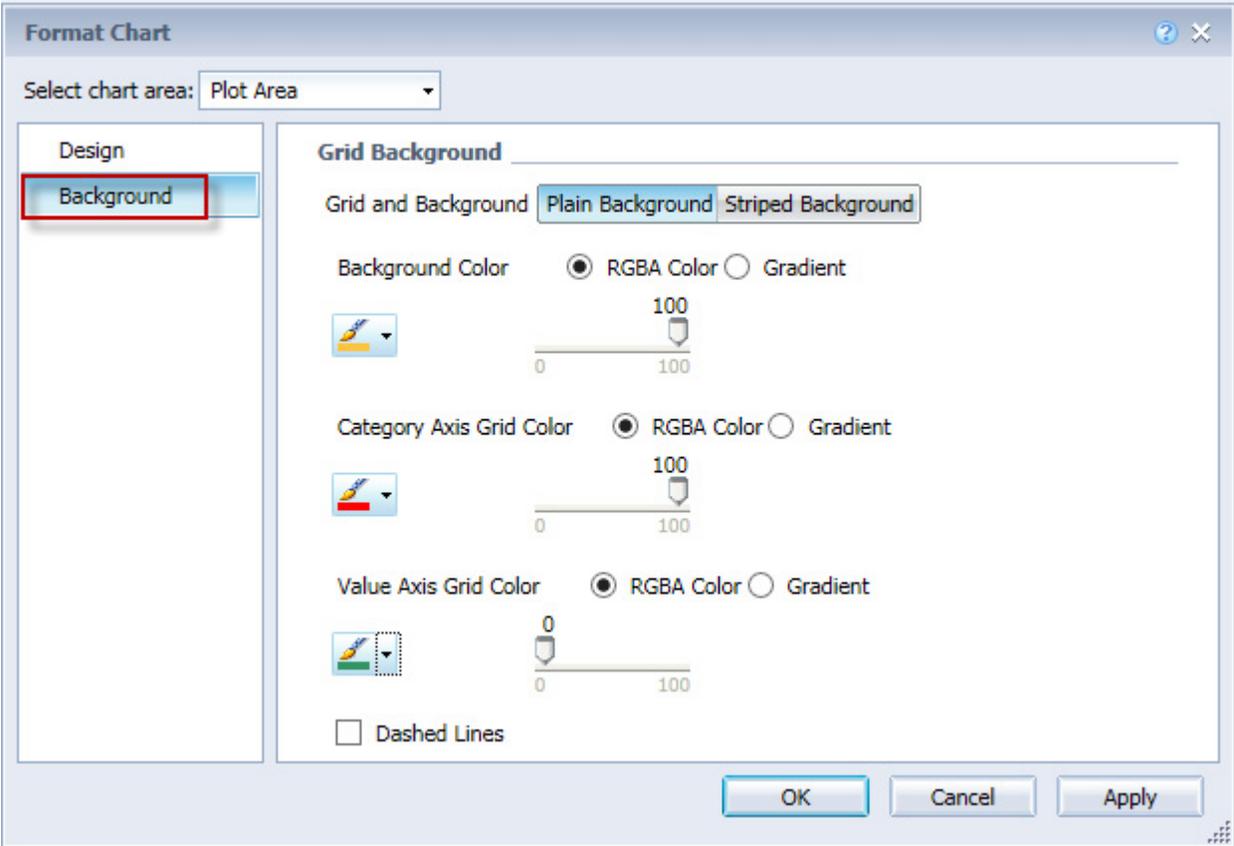
Formatting Chart Areas

In Web Intelligence, you can format chart areas by using the Formatting tab, Chart Style sub-tab and clicking on the Format Chart icon . You can also right click and select Format Chart.

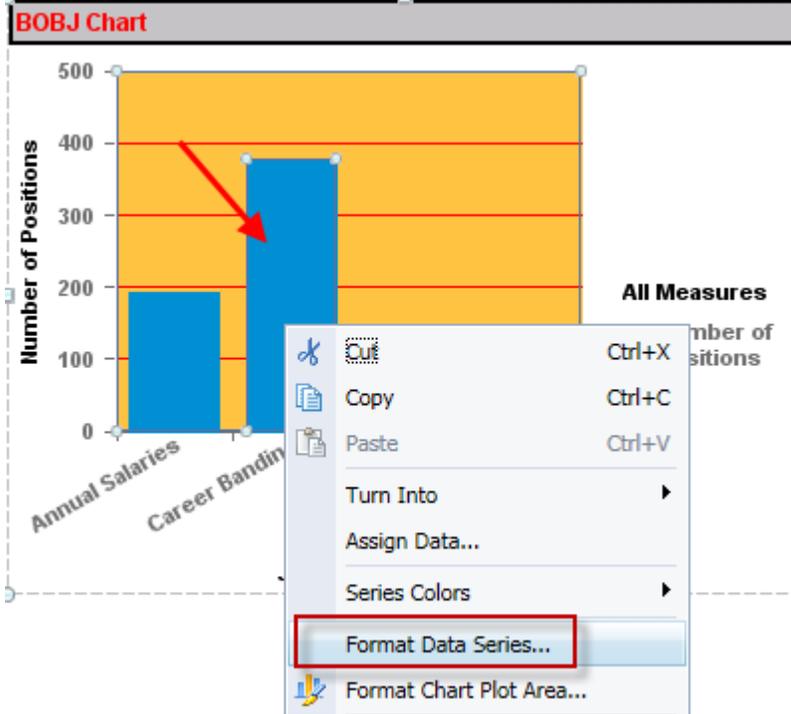
- Select the chart area by clicking on the border of the area you wish to format. In this exercise you will select the Chart Plot Area. Once the Chart Plot Area is selected, right click and select Format Chart Plot Area..



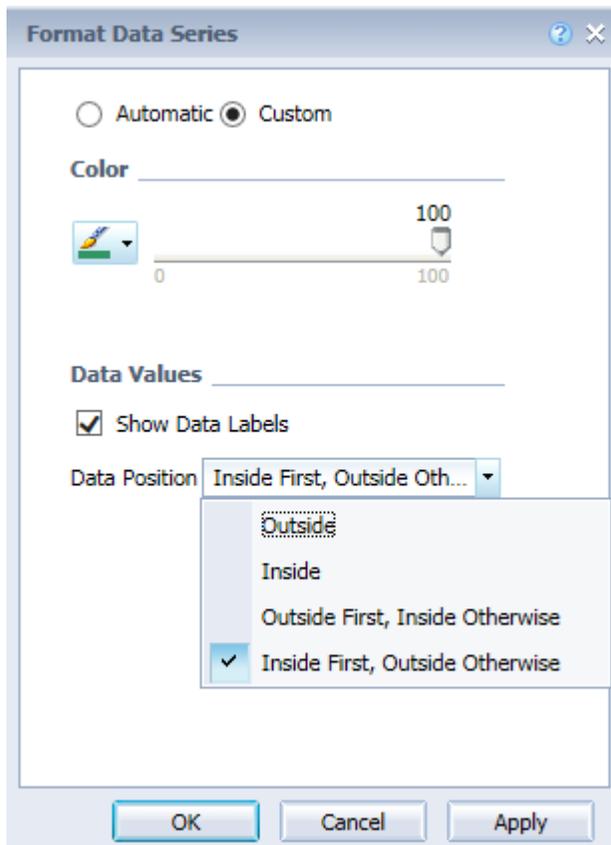
- 2. The Format Chart prompts box will display. Click on Background in the left side panel to change the background color(s) to the plot area.



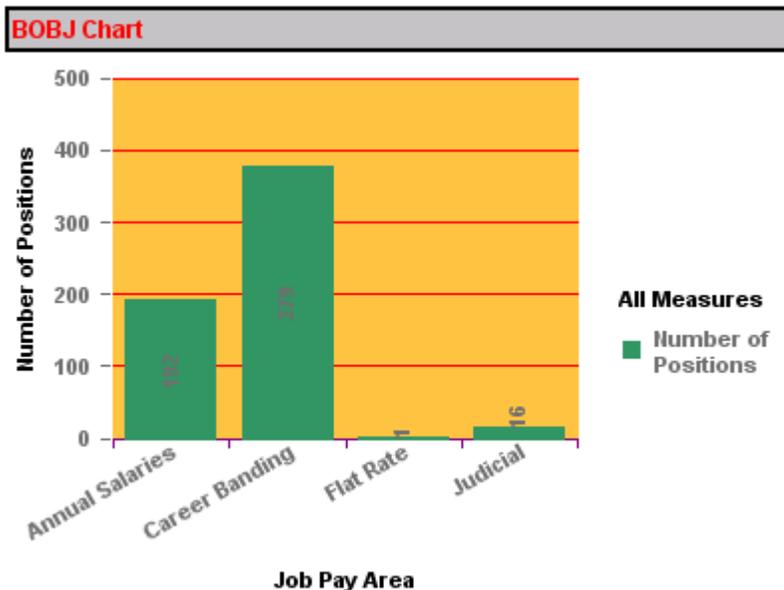
- 3. To format the Data Series, you must select the Data Series area, right click and select Format Data Series.



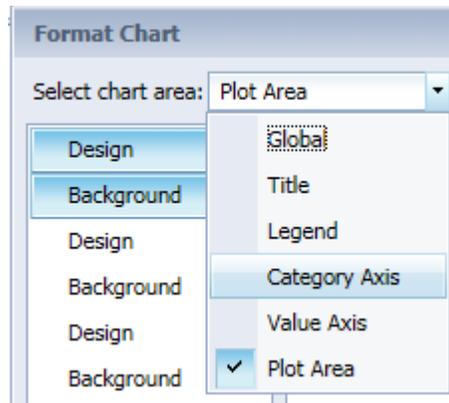
- 4. The Format Data Series prompts box will display. You can change data series to a custom color and/or select to show Data Labels.



- 5. Once you have completed formatting the chart, click OK.



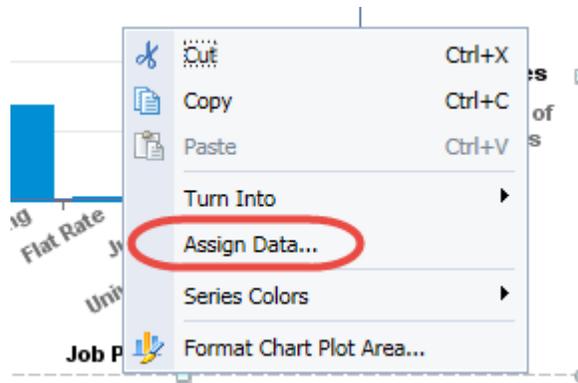
- ☞ All areas of the chart can be formatted by selecting the chart area from the drop down menu in the Format Chart prompts box.



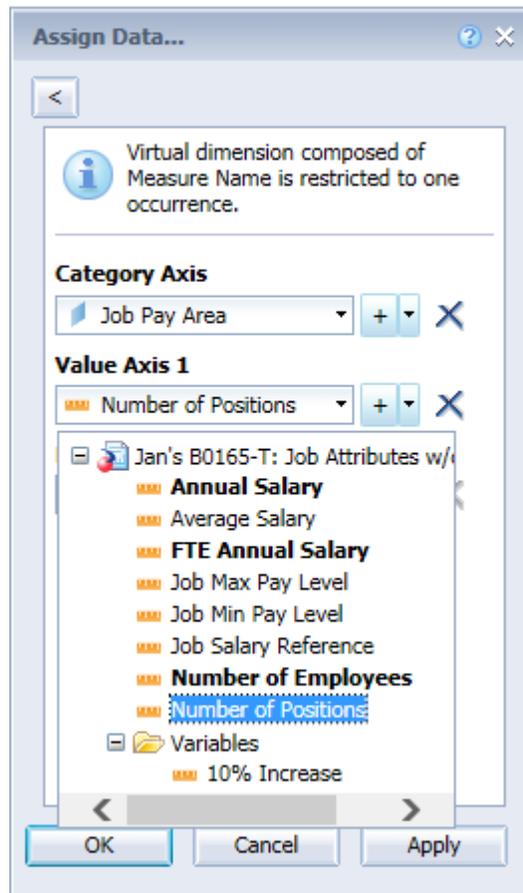
Changing Data Objects in a Chart

In Web Intelligence, you can change the data objects within a chart after the chart has been created by right clicking on the chart and selecting Assign Data.

1. Right click on the chart and select Assign Data.



- You can change the Category Axis and/or the Value Axis by using the drop down arrow beside the specific axis and selecting the object from the list that you want to change to the report. You may also add a data object by clicking on the + option beside the selection box..



- Once you have selected the data object(s) for your chart, click OK.

Filtering Data

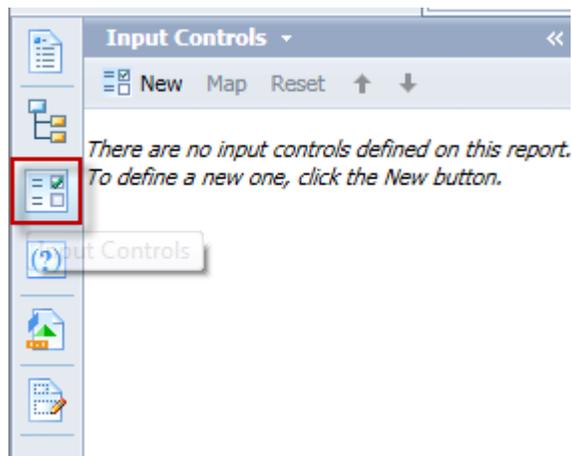
After running a query, you may decide that you want only certain data to be displayed in your report. The filters hide data that is visible in reports, charts, tables and graphs but the data is still available within the WEBI report structure. Once a report filter is removed no additional data refreshes are needed.

WEBI reports can be filtered using two methods:

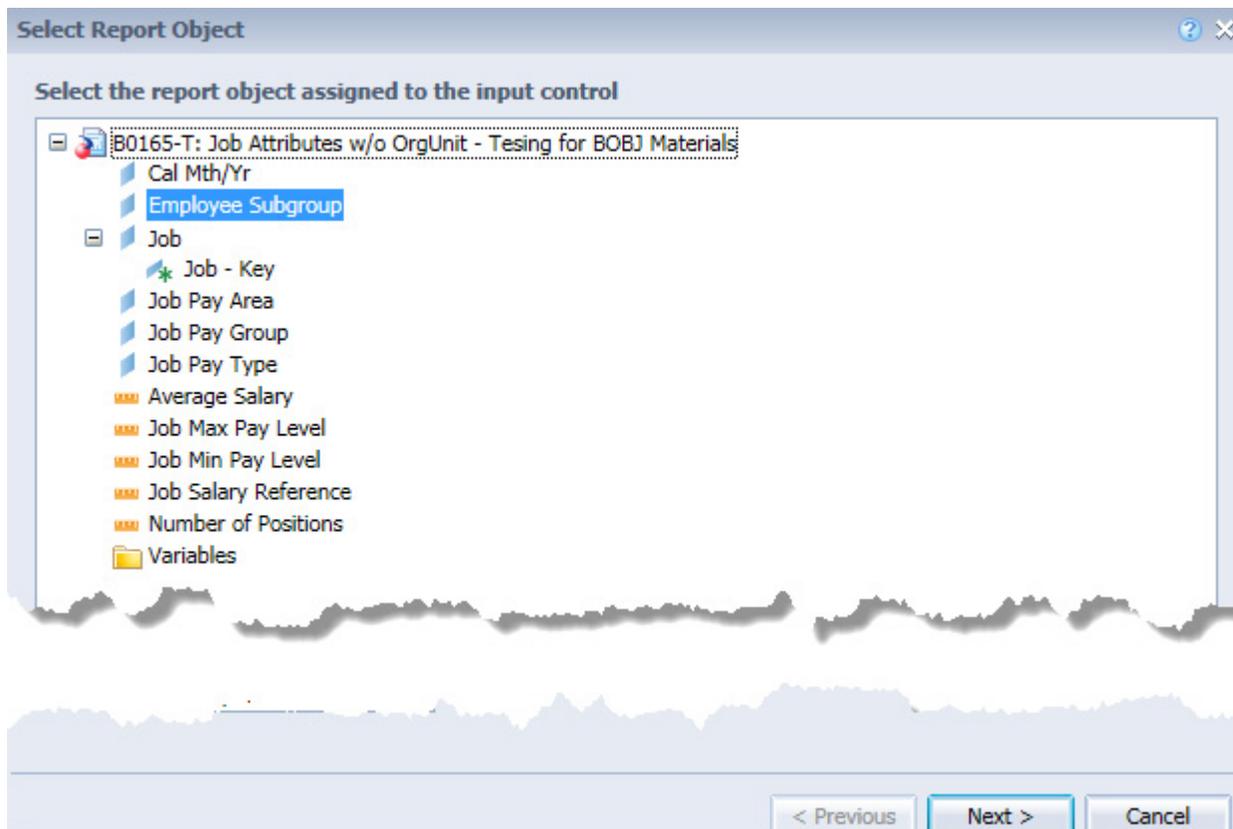
- Filter Bar** - allows for the addition of multiple single value report filters on a report. This method is also available in WEBI Reading Mode. For details in using the Filter Bar, refer to the Toolbar Menu section within Lesson 5 - WEBI Reading Mode.
- Input Controls** - provides a convenient, easily accessible method for filtering and analyzing report data. Use Input Controls to create a dynamic report depending on the selection in order to enhance the report presentation and usability. Input Controls are report-specific.

Creating Input Controls using Dimensions

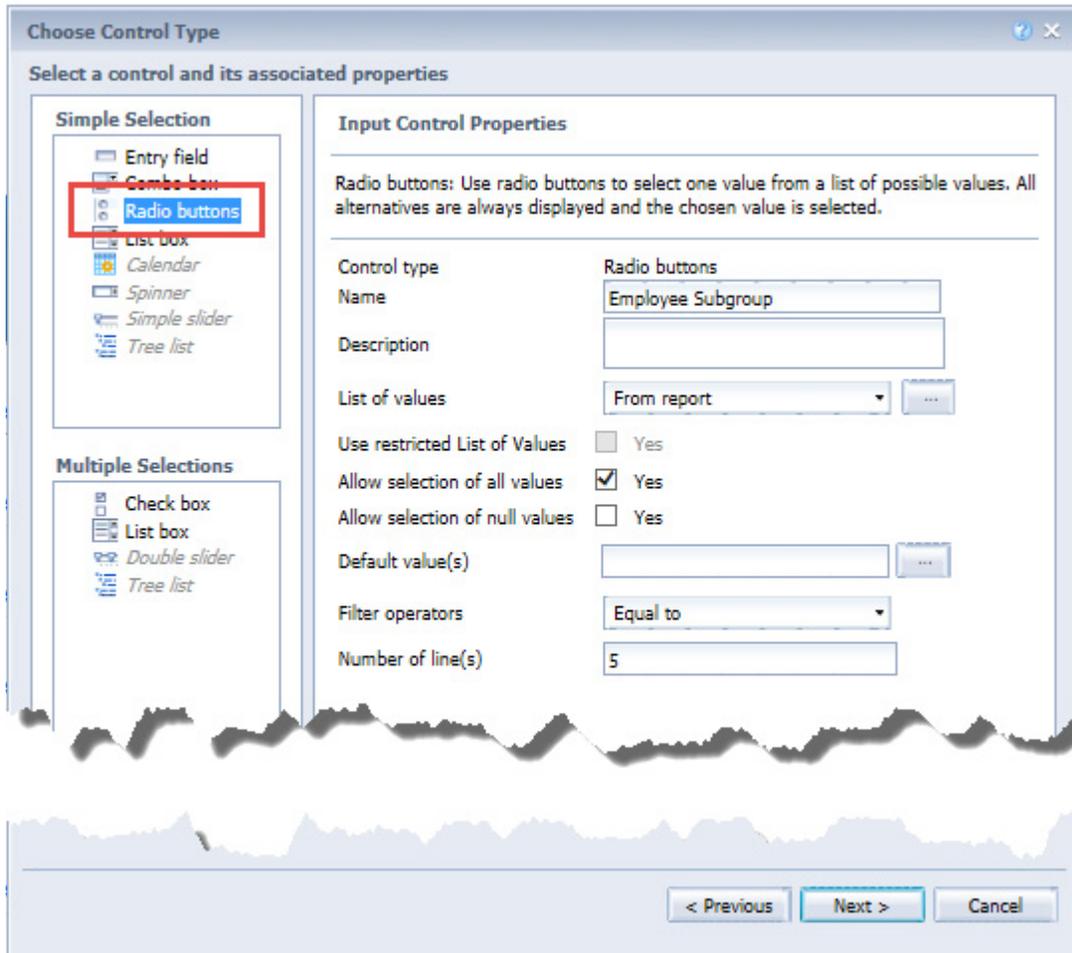
1. Click on the Input Controls button to open the Input Control left side panel.



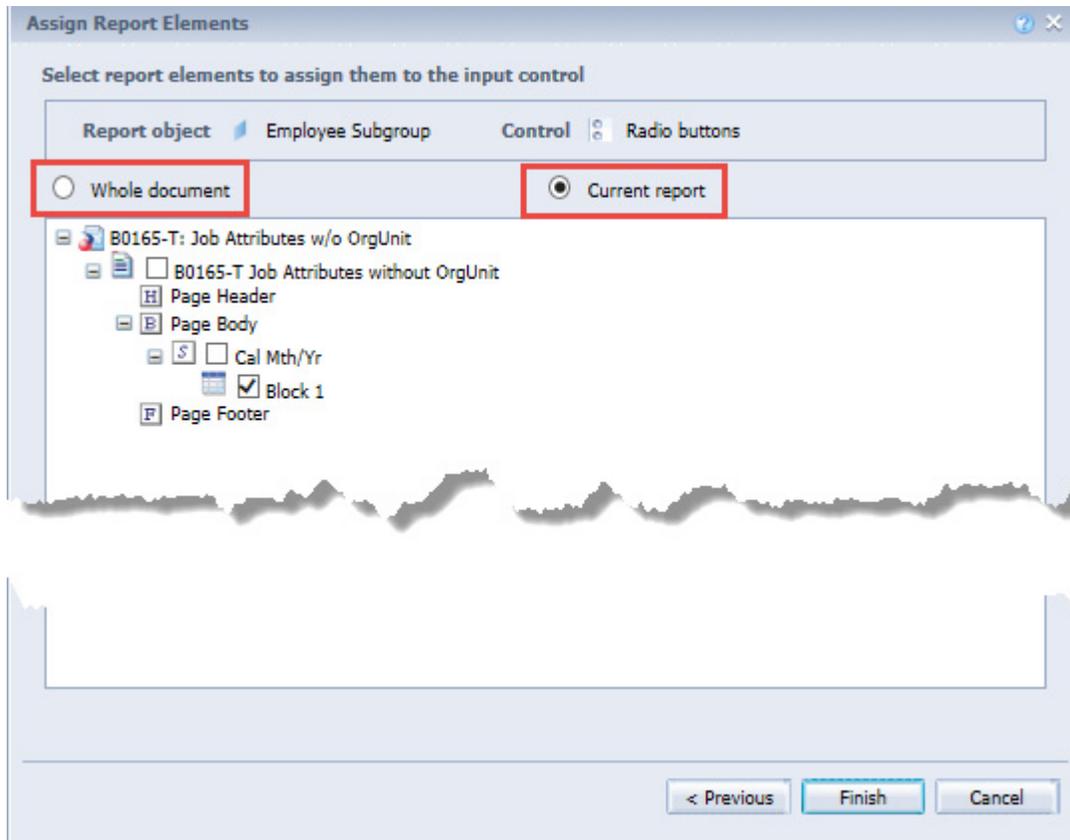
2. Click on the duplicate report tab 2 and highlight the column for the dimension on which the filtering will be done. In this exercise select Employee Subgroup.
3. Click on **New** in the Input Controls panel to display the Select Report Object prompt. Employee Subgroup should be highlighted.



4. Click **Next** to display the Choose Control Type prompt. In this exercise you will select Simple Selection, Radio Button.

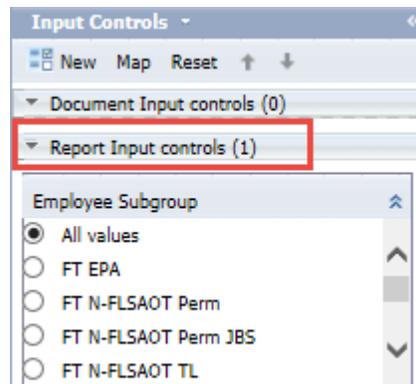


- a Simple Selection: allows you to select one value from a list of possible values.
 - b Multiple Sections: allows you to select several values from a list of possible values.
5. Click **Next** to display the Assign Report Elements prompt.
 - 📁 Input controls can be applied to the entire document, not just a single report. This is helpful where there are multiple reports that need to be filtered in a single document. Applying an input control to all reports allows global control of the data displayed in elements like tables, charts, and sections. To apply the input controls to the entire document, click on the **Whole document** option on the Assign Report Elements prompt.

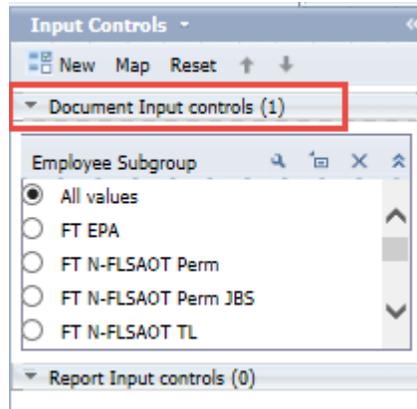


Input Controls can be associated with the report elements such as Page or Section Headers, Page Body or Page Footers. In this exercise the value you are filtering on is included in Block 1.

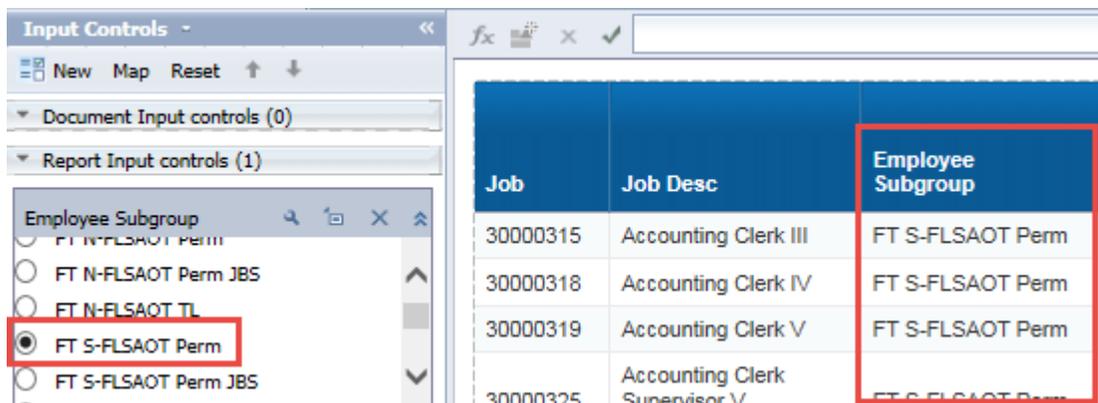
6. Click Finish
 - Report Input controls.



— Document Input controls.



7. Selection of one value in the input control selection will result in applying the filter criteria to the result in the report. In the example below, FT S-FLSAOT Perm is selected.



You may have multiple input controls within a report.

8. To add a second Input Control, highlight the column for the dimension on which the second filtering will be done. In this exercise select Job Pay Type.
9. Click on **New** in the Input Controls panel to display the Select Report Object prompt. Job Pay Type should be highlighted.

10. Click **Next** to display the Choose Control Type prompt. In this exercise select Multiple Selection, List box.

Choose Control Type

Select a control and its associated properties

Simple Selection

- Entry field
- Combo box
- Radio buttons
- List box
- Calendar
- Spinner
- Simple slider
- Tree list

Multiple Selections

- Check box
- List box
- Double slider
- Tree list

Input Control Properties

List box: Use a multiple list box to select several values from a list of possible values. All alternatives are always displayed and the chosen values are selected.

Control type: List box

Name: Job Pay Type

Description:

List of values: From report

Use restricted List of Values: Yes

Allow selection of all values: Yes

Default value(s):

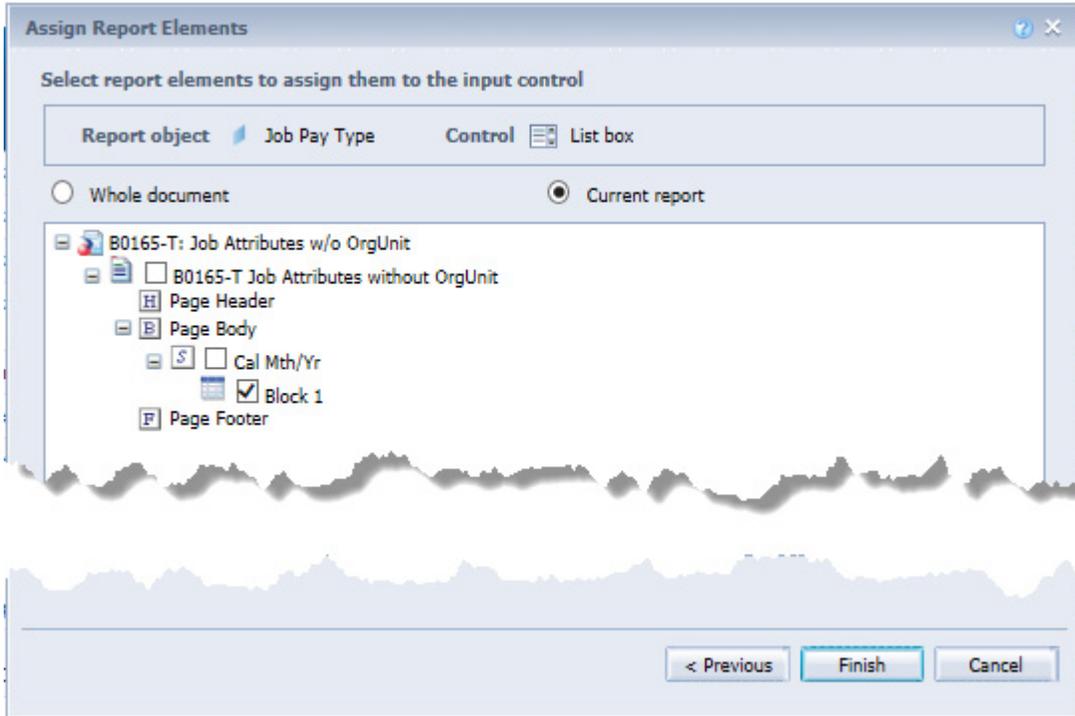
Filter operators: In List

Number of line(s): 5

< Previous Next > Cancel

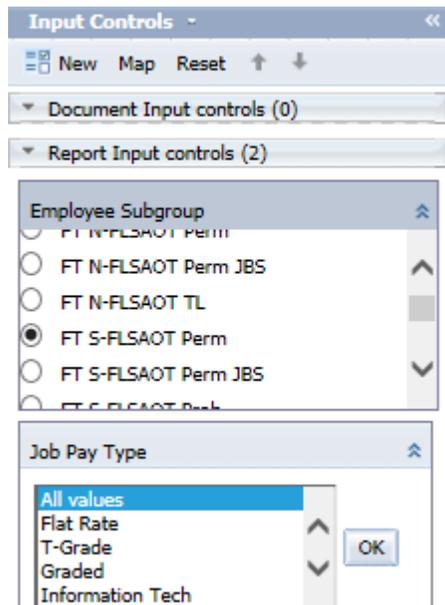
11. Click **Next** to display the Assign Report Elements prompt.

- Remember, input controls can be applied to the current report or to the whole document.



- Input Controls can be associated with the report elements such as Page or Section Headers, Page Body or Page Footers. In this exercise, the value you are filtering on is included in Block 1.

12. Click Finish.



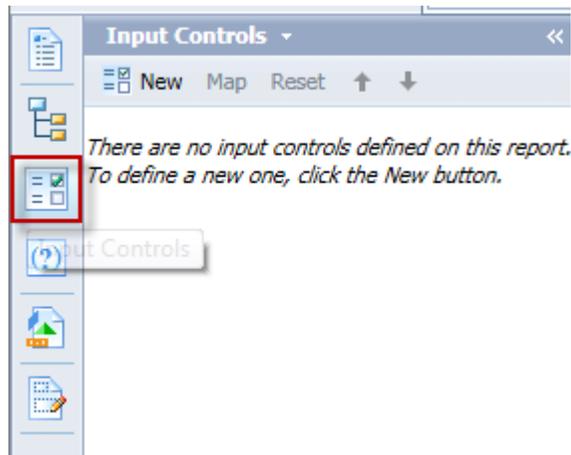
13. Selecting of one or more values in the Input Control selection and pressing OK will result in applying the filter criteria to the result in the report. In the example below, Graded and Banded are selected in the second filter. The first filter on Employee Subgroup remains as FT S-FLSAOT Perm.

Job	Job Desc	Employee Subgroup	Job Pay Type
30000325	Accounting Clerk Supervisor V	FT S-FLSAOT Perm	Graded
30003118	Security Guard	FT S-FLSAOT Perm	Graded
30003145	Security Officer II	FT S-FLSAOT Perm	Graded
30003146	Security Officer III	FT S-FLSAOT Perm	Graded
30003148	Military Security Supervisor	FT S-FLSAOT Perm	Graded
30003154	Security Coordinator	FT S-FLSAOT Perm	Graded
30003176	Security Supervisor	FT S-FLSAOT Perm	Graded
31000000	Accounting Technician	FT S-FLSAOT Perm	Banded
31000025	Accountant	FT S-FLSAOT Perm	Banded
31000190	Property Security Officer	FT S-FLSAOT Perm	Banded

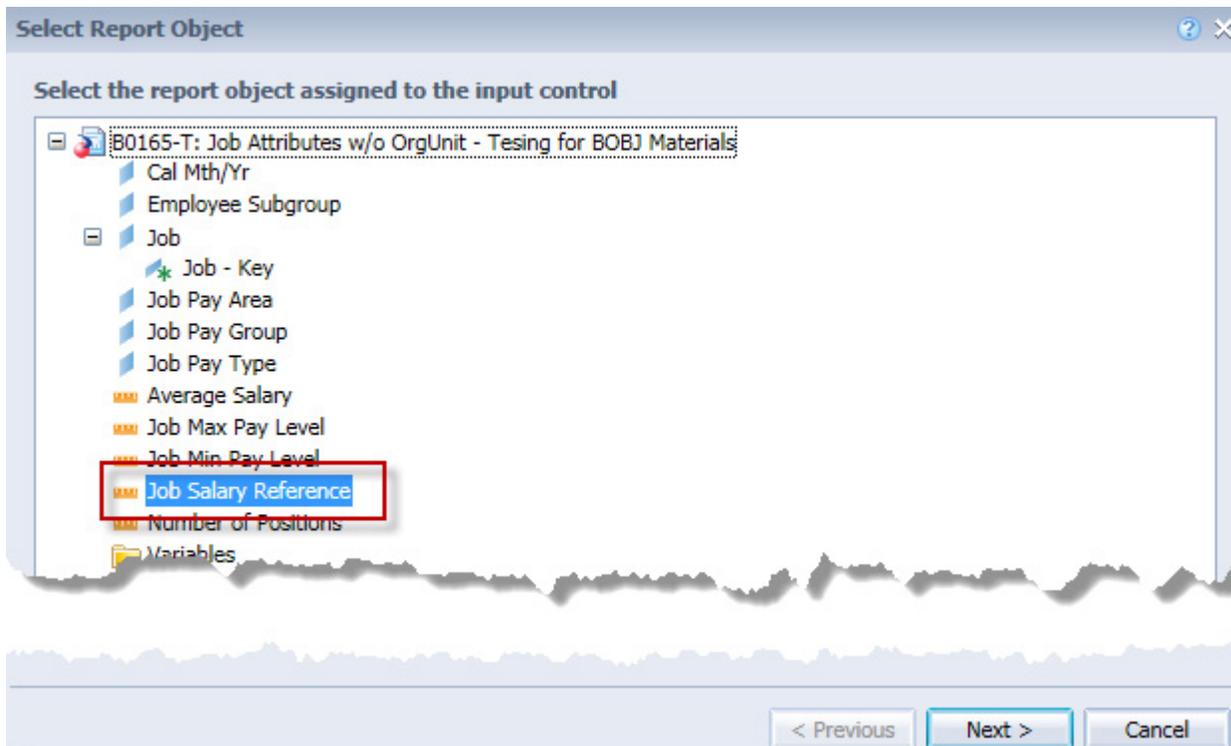
- To remove the Input Control, click on the Remove icon on the Input Control toolbar to return the results to their original, unfiltered state.

Creating Input Controls using Measures

1. Click on the Input Controls button to open the Input Control left side panel.

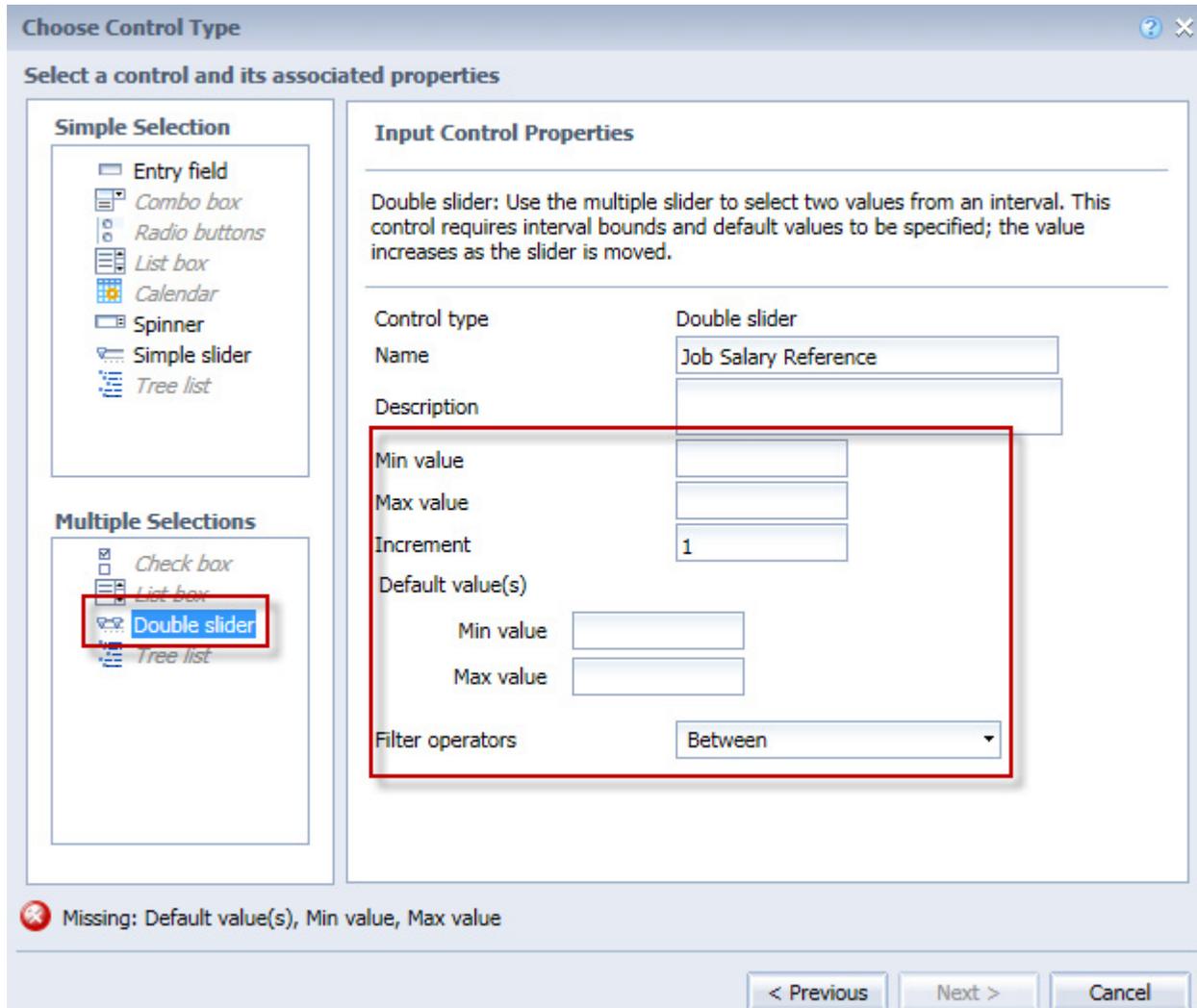


2. Highlight the column for the measure on which the filtering will be done. In this exercise select Job Salary Reference.
3. Click on **New** in the Input Controls panel to display the Select Report Object prompt. Job Salary Reference should be highlighted.



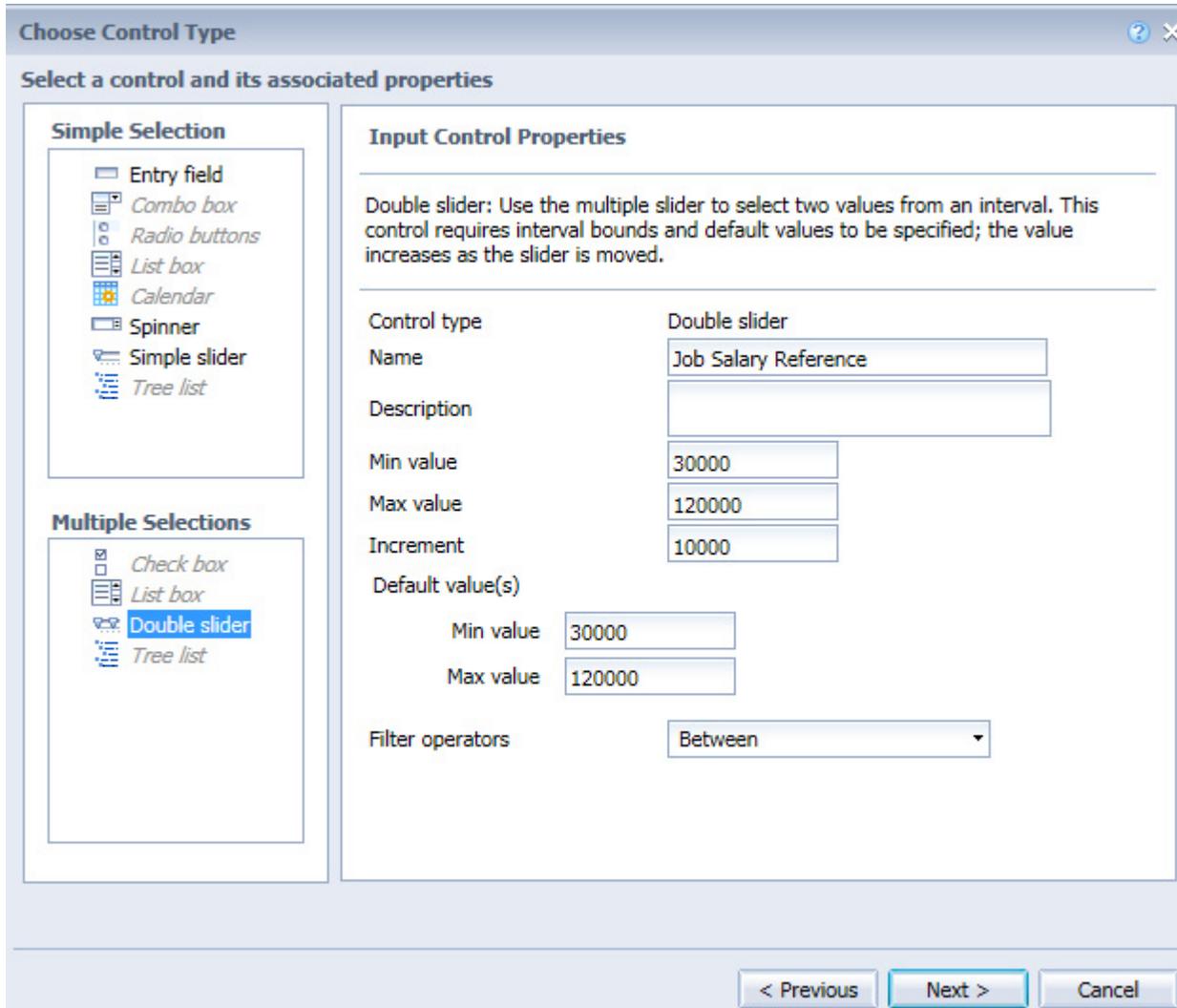
4. Click **Next** to display the Choose Control Type. In this exercise, select Multiple Selections, Double slider.

- Double slider: Use the double slider to select two values from an interval. You must set interval bounds and default values. The values change as the slider is moved.



- Set the minimum and maximum numerical values in the Input Control Properties. Once entered in the Min Value and Max Value fields, the values default to the Default value(s) field. In this exercise set the Min at 30000 and the Max at 120000
- Set the Increment - The amount by which the input control increases/decreases a numerical value when you are choosing a value. In this exercise set the Increment at 10000.

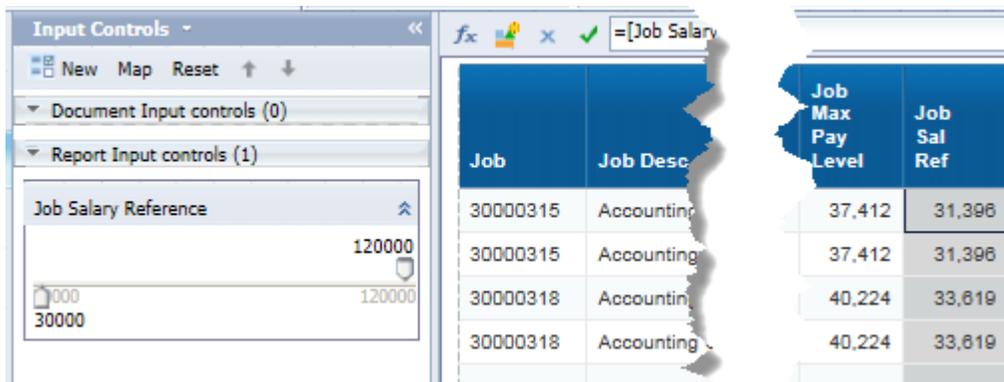
- Set the Filter operators - The operator that the input control uses to filter the associated report elements. In this exercise set the Filter operator at Between.



- Click **Next** to display the Assign Report Elements prompts.

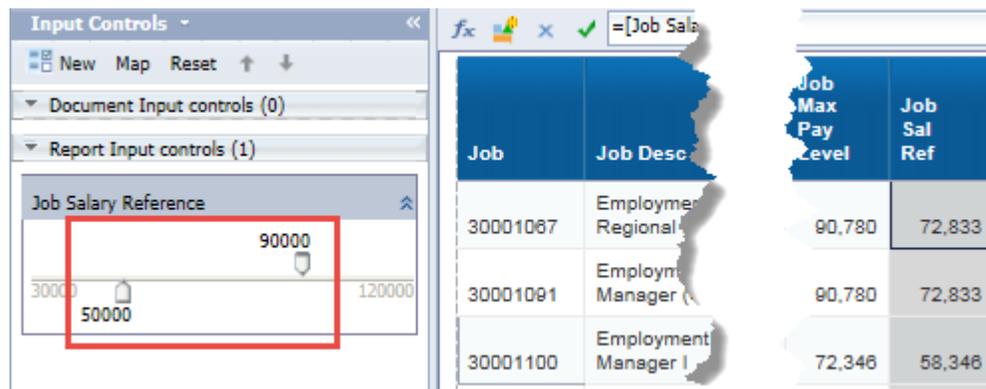
 Input Controls can be associated with the report elements such as Page or Section Headers, Page Body or Page Footers. In this exercise, the value you are filtering on is included in Block 1.

- Click Finish. The input control appears on the Input Controls panel.



The values associated with the input control are displayed in the report.

- You can change the value of the variable using the slider control. In this exercise, using the double slider, change the min value to 50000 and the max value to 90000. The values associated with the double slider input control are now displayed in the report.



Creating Sections and Breaks

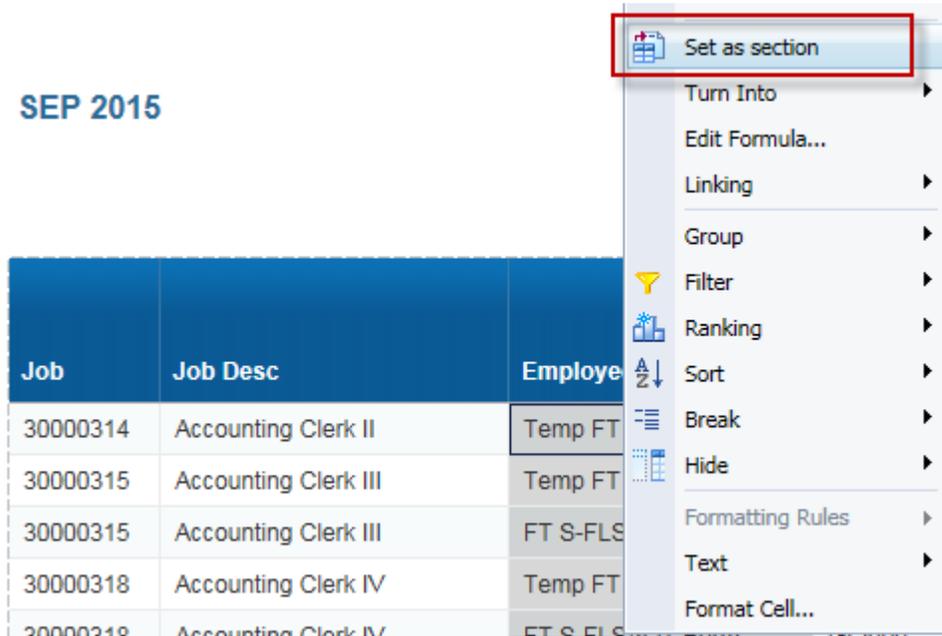
You can create sections and/or breaks in your reports to make the data easier to read and navigate between.

Creating a Section

A section distributes the data into multiple free-standing cells called section headers. Each section header contains one value for a dimension, with a block of data that corresponds to the dimension value. It allows you to split report information into a smaller, more comprehensible part.

Remember it is good practice to first make a duplicate of the original report tab before making major modifications. This way, if the changes go badly, you still have the original version of the report in a separate tab.

1. First let's duplicate the Report 2 tab by right clicking on the Report 2 tab and selecting Duplicate Report in the pop-up menu. An exact copy of the Report 2 tab is added to the document and is now the active report. You can rename the tab by right clicking on tab and select Rename Report from the menu or you can double click on the new report tab and type the new name. You should now have 6 report tabs.
2. Select the column you want to define as a Section.
3. Once you have selected the column which you want to apply the section, right click and select Set as section from the menu. **Note:** Set as section is also located in the Report Elements tab under the Tools sub-tab. In this exercise select Employee Subgroup.



4. The dimension, Employee Subgroup is now a Section Header.



- To remove the Section, drag and drop the dimension back to the report block.



Creating a Break

A break is a division within a block in which data is grouped according to a selected dimension or measure into self-contained sections. Breaks are represented as smaller tables within the same block of data. You use breaks to display all the data for each unique value of an object in separate parts.

Breaks offer the following advantages:

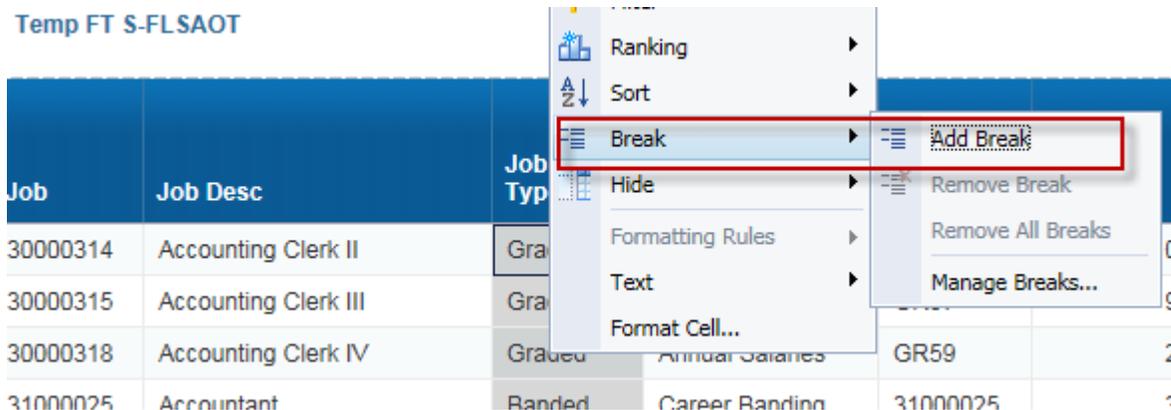
- You can more efficiently organize how your data is represented.
- You can display subtotals.
- You can display sub-aggregations.

When you apply a break to a hierarchy the break occurs on all hierarchy members at all levels.

When you apply a break in a report a default sort order is applied.

When you insert a break on an object the values for the object are automatically sorted in ascending ordering.

- Select the column in the report which you want to apply the break, right click and select Break, Add Break from the menu. **Note:** Break can also be found on the Report Elements tab, under the Table Layout sub-tab. In this exercise select Job Pay Type.



- The dimension, Job Pay Type is now separated within the one block as a break.

Temp FT S-FLSAOT

Job	Job Desc	Job Pay Type	Job
30000314	Accounting Clerk II	Graded	Ann
30000315	Accounting Clerk III		Ann
30000318	Accounting Clerk IV		Ann
		Graded	

Job	Job Desc	Job Pay Type	Job
31000025	Accountant	Banded	Care
		Banded	

FT S-FLSAOT Perm

- To remove a break, right click and select Remove Break or Remove All Breaks from the menu. You may also remove the break(s) using the Break tab.

Calculating Totals and Subtotals

Web Intelligence calculations enable you to quickly add information to your report. You can sum the values in a column, count the number of values in a column, and display averages and percentages. Many of the calculations only work with numeric data. The type of data determines which calculation functions are available.

The following table shows the available calculations and data types:

Calculation	Object Type	Description
Sum	Dimension and Measure	Calculates the sum of the selected data.
Count	Dimension	Counts distinct rows.
Count	Measure	Counts all rows.
Average	Dimension and Measure	Calculates the average of the data.
Percentage	Dimension and Measure	Displays each row's percentage of the total.

Once you have divided your report into sections, you can add section totals and subtotals.

- Select the report tab with the Sections and Breaks.
- Highlight the column you want to calculate the sum. In this exercise select the Job Salary Reference column.

- Click on the Analysis tab and select Sum from the drop down beside Sum in the Functions sub-tab.



- The sum of the Job Sal Ref values is added for each Break and a total sum is added for each Section.

Temp FT S-FLSAOT																							
Job	Job Desc	Job Pay Type	Job																				
30000314	Accounting Clerk II	Graded	Annua																				
30000315	Accounting Clerk III		Annua																				
30000318	Accounting Clerk IV		Annua																				
		Graded																					
			<table border="1"> <thead> <tr> <th>Job Min Pay Level</th> <th>Job Max Pay Level</th> <th>Job Sal Ref</th> <th>Average Salary</th> </tr> </thead> <tbody> <tr> <td>24,190</td> <td>33,687</td> <td>28,938</td> <td>0.00</td> </tr> <tr> <td>25,381</td> <td>37,412</td> <td>31,396</td> <td>0.00</td> </tr> <tr> <td>27,013</td> <td>40,224</td> <td>33,619</td> <td>34,070.40</td> </tr> <tr> <td colspan="2"></td> <td>Sum:</td> <td>93,953</td> </tr> </tbody> </table>	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	24,190	33,687	28,938	0.00	25,381	37,412	31,396	0.00	27,013	40,224	33,619	34,070.40			Sum:	93,953
Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary																				
24,190	33,687	28,938	0.00																				
25,381	37,412	31,396	0.00																				
27,013	40,224	33,619	34,070.40																				
		Sum:	93,953																				
Job	Job Desc	Job Pay Type	Job																				
31000025	Accountant	Banded	Caree																				
		Banded																					
			<table border="1"> <thead> <tr> <th>Job Min Pay Level</th> <th>Job Max Pay Level</th> <th>Job Sal Ref</th> <th>Average Salary</th> </tr> </thead> <tbody> <tr> <td>37,012</td> <td>96,811</td> <td>59,342</td> <td>0.00</td> </tr> <tr> <td colspan="2"></td> <td>Sum:</td> <td>59,342</td> </tr> </tbody> </table>	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	37,012	96,811	59,342	0.00			Sum:	59,342								
Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary																				
37,012	96,811	59,342	0.00																				
		Sum:	59,342																				
			<table border="1"> <tbody> <tr> <td colspan="2"></td> <td>Sum:</td> <td>153,295</td> </tr> </tbody> </table>			Sum:	153,295																
		Sum:	153,295																				

- To remove the Sum, click on Sum from the drop down menu in the Functions sub-tab.

Exporting the report

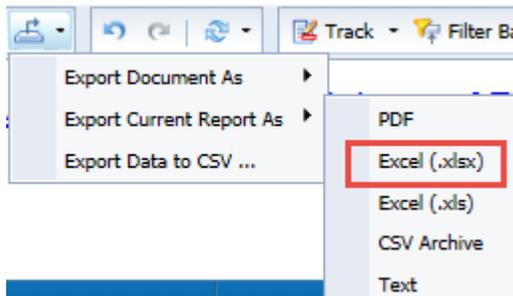
A report can be exported to another application for sharing or manipulating.

- Click on the Export icon from the tool bar menu:

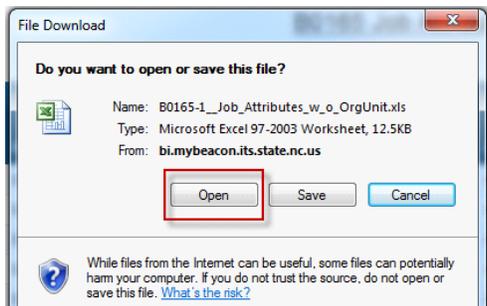
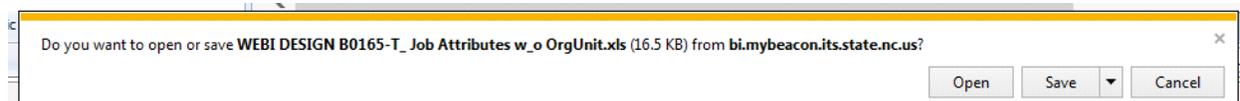
There are 3 options to export.

- Export Document As - this allows you to export the entire report - if you have added additional reports to the original. You can export them all into separate tabs in an Excel workbook.
- Export Current Report As - this allows you to only export the active report you have on your screen. If you have added additional reports, they will not be exported.

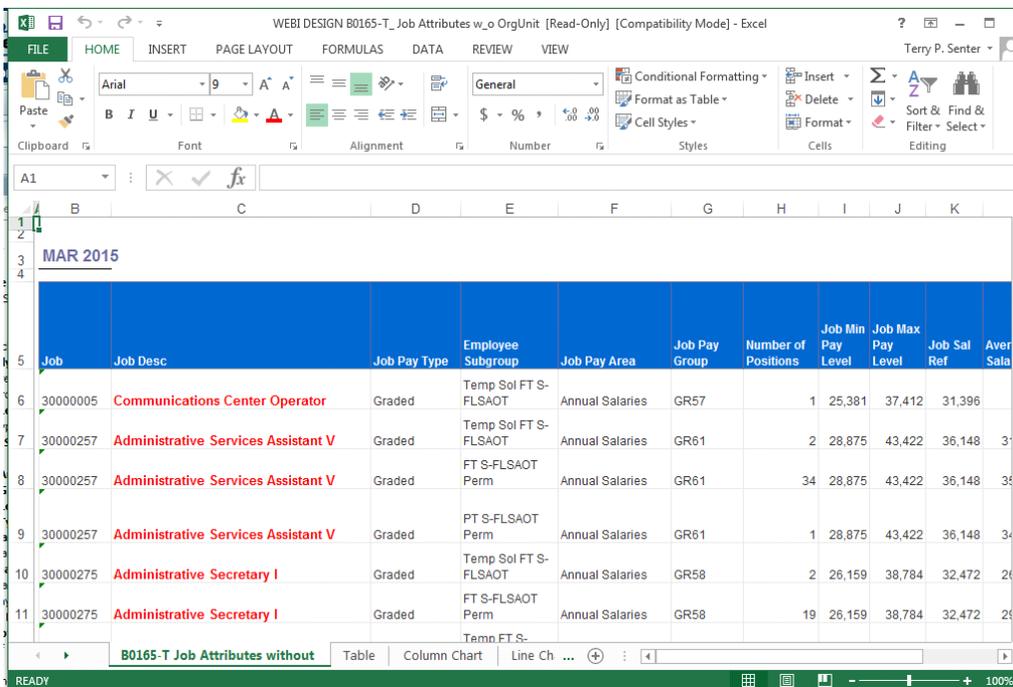
- c Export Data to CSV - this allows you to export the data in the report as a Comma Separated value to then import into another format.
- 2. Select Export Document As - For this exercise you will choice Excel (.xlsx) from the additional menu.



- When exporting to Excel from Web Intelligence, choose the 'Excel 2007' format in order to accommodate more than 65K rows. If you have more than 65K rows of data and you choose the 'Excel' format for exporting, your data will be split into two worksheets in Excel with the first sheet containing the 65K and the remainder will be placed in a second sheet.
- 3. You will be asked to either Open or Save the File Download. Select Open. The option you see will be dependent on your MS Office version being used.



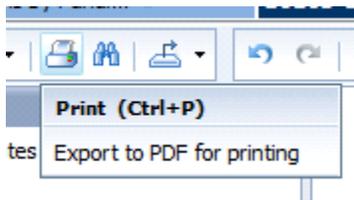
- Your report will be exported to Excel where you can save the file for later manipulation and use.



Printing the Report

WEBI allows you to print the report. The system will convert it to a PDF document first and then ask you to either Open or Save before printing.

- Click on the Print icon on the toolbar menu:



- Click on Open from the File Download box.



3. The report will open in PDF with normal options available - including Print.

Job	Job Desc	Job Pay Type	Employee Subgroup	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level
30000005	Communications Center Operator	Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR57	1	25,381	37,4
30000257	Administrative Services Assistant V	Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR61	2	28,875	43,4
30000257	Administrative Services Assistant V	Graded	FT S-FLSAOT Perm	Annual Salaries	GR61	34	28,875	43,4
30000257	Administrative Services Assistant V	Graded	PT S-FLSAOT Perm	Annual Salaries	GR61	1	28,875	43,4
30000275	Administrative Secretary I	Graded	Temp Sol FT S-FLSAOT	Annual Salaries	GR58	2	26,159	38,7

Save As

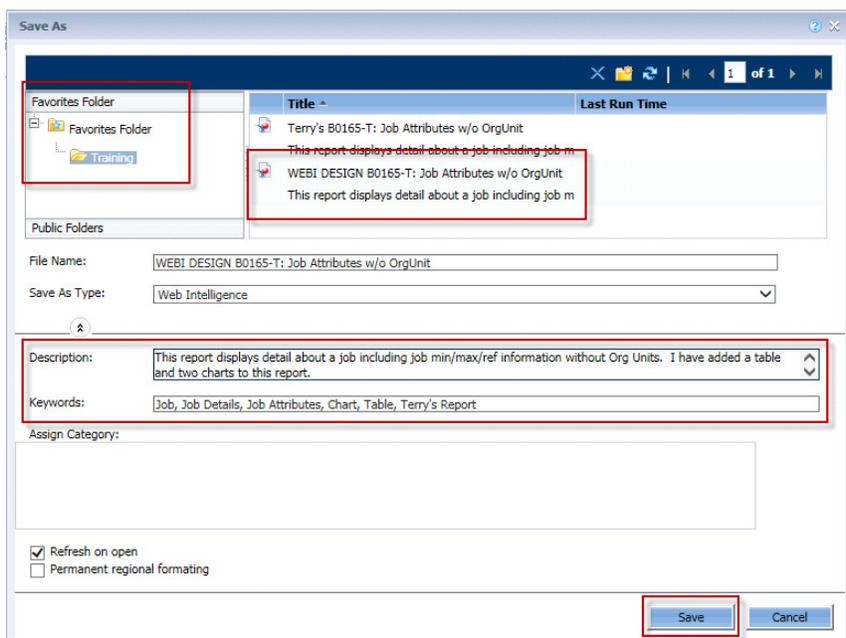
WEBI allows you to save reports to your Favorites folder. You can not save to the Public Folders. It is important to remember that if updates are made to the report located in the Public Folders your saved report will not be updated.

By Default, data refreshes each time the report is opened.

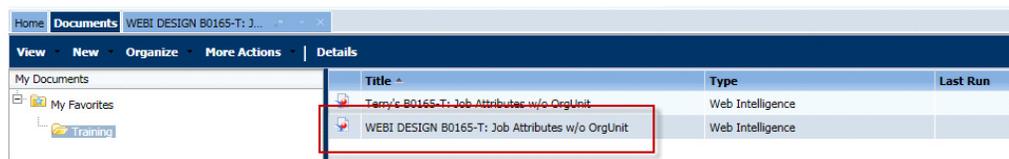
1. Click on the Save As option on the File toolbar.



2. In the Save As dialog box click on the Favorites Folder Drawer, then the Favorites Folder file. You may update the File Name, Description and Keywords fields. Click the Save button at the bottom of the screen.



3. You will now see the report listed in the My Documents drawer - My Favorites folder:

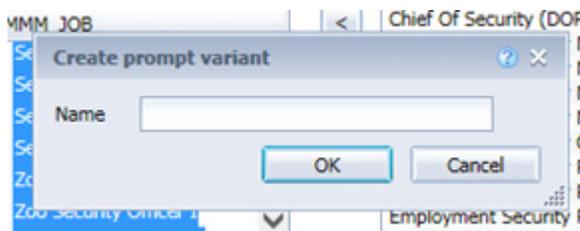


 Each time you run this report, the data will refresh.

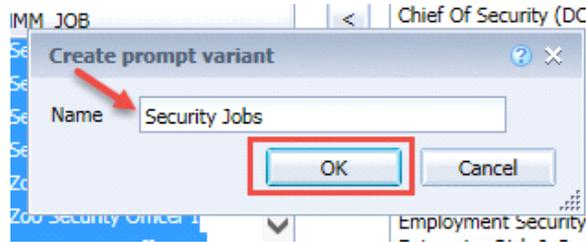
Creating a Variant

If you run a specific Web Intelligence report with the same set of values often, you can create a prompt variant which saves the values in the prompts for reports saved in your My Favorites folder. You must first create, run and save the WEBI report in your My Favorites folder. Now that you have a saved report, run the report. Once the prompt screen is displayed and the value(s) is selected for the appropriate prompt(s) complete the following steps to create the prompt variant.

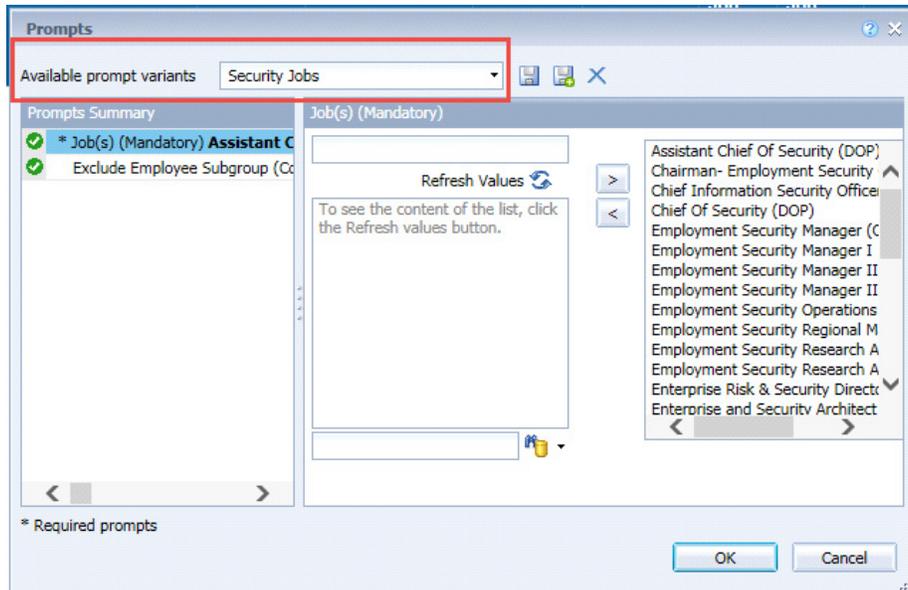
1. Click the Create Prompt Variant icon . This will open a Create prompt variant box.



2. Enter the desired name of the variant.

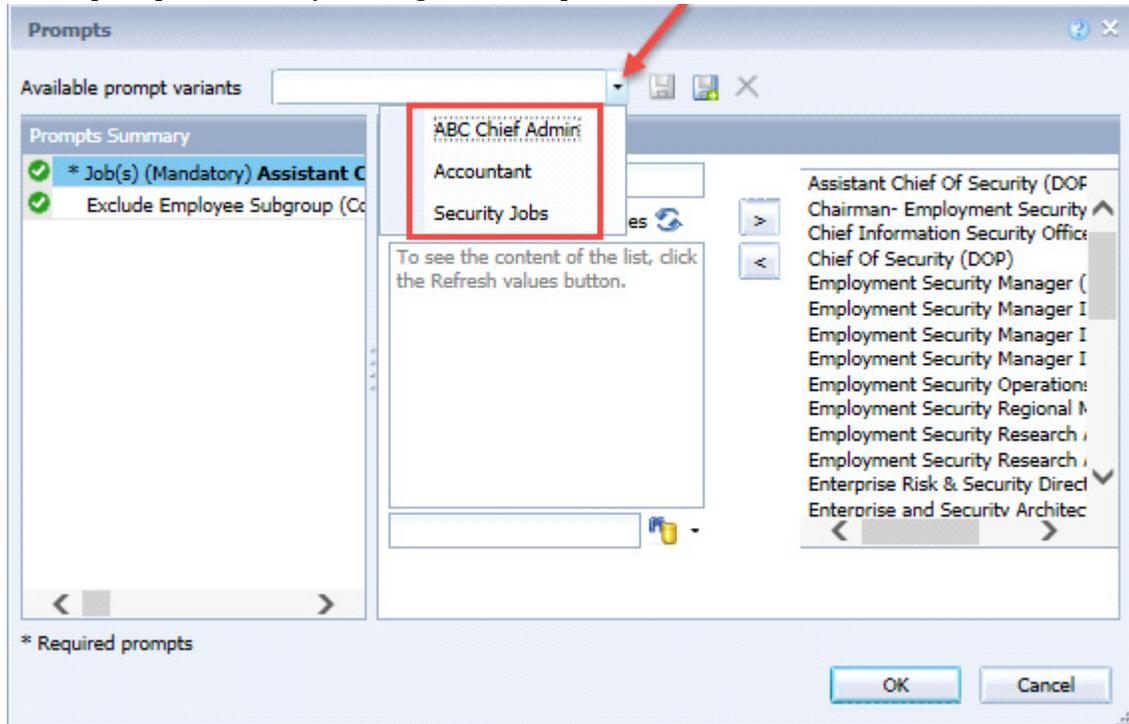


3. Click OK
4. The prompt variant has been saved and is available to use in this specific report.

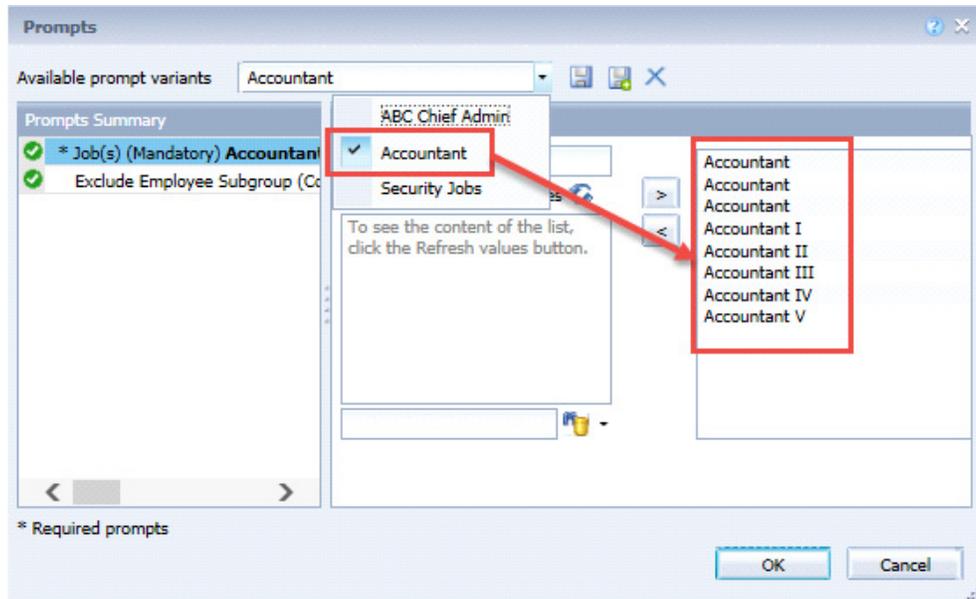


5. Click OK to generate the report.
-  It is very important to save your report often while working in Design mode.

- The next time you run the report from your My Favorites folder, you can see any saved prompt variants by clicking on the drop-down menu.



- Select the variant from the Available prompt variants drop-down menu according to the data you would like displayed in the report. In the example below, Accountant is selected therefore the report will only display the data for Accountant jobs.



8. Click OK to run the report.

B0165-T: Job Attributes w/o OrgUnit as of

FEB 2016

Job	Job Desc	Job Pay Type
30012947	Accountant	Graded
31000025	Accountant	Banded

-  There are some limitations with using prompt variants. First, it does not support manual entry in the prompts and second, the prompt variant does not get saved with a new copy of the report. If you save a copy of the report in your My Favorites folder you will need to create a new variant for the new report. It should prove helpful to users when a report is used often with the same or very similar prompt selections, especially if the selections are complex.

SUMMARY

In this lesson, you learned to:

- Open a WEBI report and change to design mode to analyze and explore data
- Add Columns and Variables to WEBI Reports
- Add Tables and Charts to WEBI Reports
- Save a WEBI report to My Favorites Folder for future access
- Create a Variant

Course Review

Introduction
Lesson 1: Business Objects Definitions and Launch Pad
Lesson 2: Dashboard Reports
Lesson 3: Crystal Reports
Lesson 4: Web Intelligence - Reading Mode
Lesson 5: Web Intelligence - Design Mode
Lesson 6 Course Review

Course Objectives

In this course you learned to:

- Understand the definition of Business Objects
- Understand the definition of Launch Pad and the components
- Understand the definition and view Dashboard Reports
- Understand the definition and view Crystal Reports
- Understand the definition Web Intelligence Reports
- Open a WEBI report and change to design mode to analyze and explore data
- Add columns and Variables to WEBI Reports
- Add Tables and Charts to WEBI Reports
- Save a WEBI report to My Favorites Folder for future access
- Create a Variant

Next Steps

- Monitor BOBJ Information:
 - BEST Shared Services website (BOBJ Information site)
 - URL: http://www.osc.nc.gov/BEST/support/support_BOBJ.html
 - BOBJ What's New link
 - URL: http://www.osc.nc.gov/BEST/bobj_what's_new.html
- Access the Training HELP site
 - URL: <http://www.osc.nc.gov/training/osctd/help>
- Other Resources
 - _Help Folder within Business Objects Reporting Tools

Keep your training materials close by as a ready reference.

Need Assistance?

You may either call BEST at 919-707-0707 or email BEST at BEST@osc.nc.gov to log the incident. If you email BEST, be sure to include BOBJ in the subject line of the email so the incident will be escalated to the correct group for assistance. If possible, include screen shots and detailed information on the question or issue to assist with troubleshooting.

If you are experiencing technical difficulties, refer to the State Desktop PC and Browser Setting Requirement documentation.

- URL: http://www.osc.nc.gov/BEST/support/PC_Minimum_Requirements_State_owned_PCs.pdf

Course Evaluation

Follow the instructions given by your instructor to complete your evaluation of today's class in the Learning Management System (LMS).

 Don't forget to click the SUBMIT button---**TWO DIFFERENT TIMES**

CONGRATULATIONS!

You've completed the course!