Web Intelligence Rich Client User Guide



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Selecting the version of Web Intelligence

There are two versions Web Intelligence that you can use to created and edit reports. One is the HTML version and the other is the Desktop or Rich Client version. The major difference between the versions is that the HTML version only allows you to save to your folders in the Business Objects (EDDIE) repository. The Rich Client version allows you to save to the repository or to your hard-drive or network drives. Also, the Rich Client has to be installed. There are other small differences, but the HTML version does almost everything the Rich Client does.

You can select which version to use when viewing reports in EDDIE and when modifying reports. By default the HTML version will be used for both viewing and modifying reports. The following steps show how to select the Desktop or Rich Client version to modify reports.

Log into EDDIE

E.

1. Open the EDDIE login page: <u>https://eddie.ds.uillinois.edu/</u>

Welcome to EDDIE from AITS
The Enterprise Data Delivery Information Environment (EDDIE) system is a Business Objects environment for delivery of query, analysis, and reporting at the University of Illinois. Through EDDIE, you can retrieve, view, and print reports. You can also create custom reports of your own.
Log In to EDDIE
► Log In to EDDIE
Other Environments: (click name to log in) <u> DEV</u> <u>QA</u>
Customer Alerts
No Current Alerts
There are no customer alerts at this time. All systems are functioning normally. Please refer to the <u>Data Availability</u> table to verify processing
Additional Resources
AITS - Reports & Data Business Objects 4.1 Resources Contact AITS
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2. Click the Log In to EDDIE button.

3. Enter your University NetID and Password.

NetID	
YourNetid	G
Password	
•••••	
LO	G IN
Forgotten or expired p	assword?
Account ontions	Heln logging in

4. Click LOG IN.

Setting your Web Intelligence Preferences

1. Select Preferences (upper right corner)

▼ 0 unread messages in My Inbox	My Applications
No unread messages	
	P
See more	
▼ 0 Unread Alerts	
♥ 0 Unread Alerts	

2. Under Preferences – select Web Intelligence.



3. Under Modify (creating, editing and analyzing documents), select **Desktop** (Rich Client, Windows only, installation required).



- 4. Click the **Save & Close** button in the bottom right corner of window.
- 5. From EDDIE home page **My Applications** menu, click the Web Intelligence icon.

Welcome: Curry, Patricia Ann Applications - Preferences	Help menu 🔻 🕴 Log off
 ▼ 0 unread messages in My Inbox	My Applications
No unread messages	P
	\square
 See more	
 ▼ 0 Unread Alerts	
No unread alerts	

6. When prompted to Open or Save the file, Click **Open**

Do you want to open or save ZHVtbXIOYW11.zabo_wi (2.95 KB) from qa-eddie41.ds.uillinois.edu?	Open	Save	▼ Cancel	×

7. Web Intelligence Rich Client opens and the home page is displayed:

New Document Open Document Create a document with a recently used data source or provess for more data Open a recent document or provess for one on your computer. Choose a data source to create a document Nore Open a recent document or browss for one on your computer. Choose a data source to create a document Nore Open Document Where Studies 16/15 320 PM Open a recent document or browss for one on your computer. EDW - STU - Course Schedule 16/15 320 PM Open Bock EDW - STU - Course Schedule 16/15 220 PM Open Bock EDW - STU - Course Schedule 16/15 220 PM Open Bock EDW - STU - Course Schedule 10/15 20 PM Open Bock EDW - STU - Course Schedule 10/15 20 PM Open Bock EDW - STU - Course Schedule 10/15 20 PM Open Bock EDW - STU - Course Schedule 10/15 20 PM More Select a BEC operty as a data source. P More P More Select a Web Service as a data source. P More P More Select a Web Service as a data source P More P More Select a Web Service as a data source P More P More Select a Web Service	ce Rich Client - [ADHOC1 - @URBBOE41QA4.AD.UILLINOIS.EDU:6400 (Connected (HTTP)]			
New Document Create a document with a recently used data source or <u>browses</u> for more data sources. Choose a data source to create a document Import 1000000000000000000000000000000000000					
Image: Choose a data source to create a document Image: Choose a data source to create a document Image: Choose a data source in the transmission of transmission	New Document Create a document with a recently used data source or braw sources.	<u>se</u> for more data	Open Document Open a recent document or brox	vse for one on your computer.	
Image: Street all the state source. P More Select a the street as a data source. P More Select a Web Service as a data source. P More Image: Blank Document Select a Web Service as a data source. Select a Web Service as a data source.	Choose a data source to create a document		Recent Documents		
Inductor Inductor 108/15 3/28 PM EDW - STU - Course Schedule 16/15 3/28 PM EDW - STU - Course Schedule 8/19/14 1/3 PM EDW - STU - Course Schedule 8/19/14 1/3 PM Image: Schedule 8/19/14 1/15 PM Image: Schedule 9/19/14 1/15 PM Image: Schedule 9/19/14 1/15 PM Image: Schedule 9/19/14 1/15 PM Image: Schedule 9/10/27/14 2/39 PM Image: Schedule 9/10/27/14 2/39 PM Image: Schedule Schedule 9/10/27/14 2/3		Q More	Name	Size Date	
Image: Select an Excel spreadsheet as a data source. P More Image: Select an Excel spreadsheet as a data source. P More Image: Select a BEx query as a data source. P More Image: Select a BEx query as a data source. P More Image: Select a text file as a data source. P More Select a text file as a data source. P More Image: Select a text file as a data source. P More Select a Web Services P More Select a Web Service as a data source P More Select a Web Service as a data source P More Select a Web Service as a data source P More	1/6/15 3.28 PM EDW - STU - Course Schedule 1/6/15 2.57 PM EDW - STU - Course Schedule 8/19/14 1:09 PM EDW - STU - Course Catalog 3/19/14 1:15 PM	r muic	Yesterday Glass Roster Older Grem Sections 41	138 KB 1/14 49 KB 10/2	/15 3:16 PM 7/14 2:39 PM
Image: Select a BEx query as a data source. P More Image: Analysis View P More Pick an Analysis View P More Image: Text P More Select a text file as a data source. P More Image: Web Services P More Select a Web Service as a data source P More Select a Web Service as a data source P More Select a Web Service as a data source P More	Excel Select an Excel spreadsheet as a data source.	P More			
Image: Analysis View Image: Analysis View as a data source. Image: Text Image: Analysis View as a data source. Image: Select a text file as a data source. Image: Analysis View as a data source. Image: Web Service as a data source Image: Analysis View as a data source. Image: Select a Web Service as a data source Image: Analysis View as a data source.	BEX Select a BEx query as a data source.	P More			
Text P More Select a text file as a data source. P More Web Services P More Select a Web Service as a data source P More	Analysis View Pick an Analysis View as a data source.	P More			
Image: Web Services Image: Web Service as a data source Select a Web Service as a data source	Text Select a text file as a data source.	P More			
Blank Document	Web Services Select a Web Service as a data source	P More			
	Blank Document				

Close Web Intelligence

Web Intelligence Rich Client will stay running even after you close it. You have the option to have Web Intelligence completely close rather than stay running in the background. To have Web Intelligence completely close:

1. Click the Tools icon in the upper-right corner.



2. Select Options from the pop-up menu.

		<u>.</u>	2
	Login as	Ctrl+L	
	Change Password		
	Import Universe		
ā	Manage BI services		

8 | Page

3. Uncheck the Keep process active after closing last window option.

Web Intelligence	e Options 📀 🗴
General	Select a default universe:
Viewing	No default universe
Locale	O Select a universe Browse
Proxy	Select default folders:
-	User documents: C:\Users\jclennon\Documents\My SAP Bus Browse
	Universes: C:\Users\jclennon\Documents\Personal\Parl Browse
	Help (*): C:\Program Files\SAP BusinessObjects\SA Browse
	Select a priority for saving to MS Excel:
	Prioritize easy data processing in Excel
	Prioritize the formatting of documents
	Web Intelligence Rich Client process
	Keep process active after closing last window (**)
	(*) Path can be on file system or be a URL (**) Improves document loading time
	OK Cancel

You also might want to change the unit of measure from centimeters to inches.

4. Select the Viewing option on the left.

General	Measurement unit:	
Viewing	 Inch 	
Locale	 Centimeter 	
Drill		
Proxy	Grid	
	Show grid	
	Snap to grid	
	Grid spacing: 0 "	
	Conv / Paste	
	Reuse copied elements in other vveb intelligence documents (slower)	

- 5. Select the Inch radio button.
- 6. Click **OK**.

Opening Web Intelligence Rich Client from your Desktop

1. Click on the Windows Start icon.

- 2. Select All Programs.
- 3. Select SAP Business Intelligence.
- 4. Select SAP Business Objects Web Intelligence.

The Web Intelligence Home Page is displayed:

b Intelligence Rich Client - [Standalone]					
telligence 🗸 🗋 🗁 💌 🔚 🔹 🛛 👫 🛛	× 🖂				@ - C
New Document Create a document with a re data sources.	cently used data source or	browse for more	Open Document Open a recent document	t or <u>browse</u> for one on your comp	iter.
Choose a data source to crea	te a document		Recent Documents		
2 Universe		More	Name	Size	Date
EDW - Finance Accounts Receivab EDW - STU - Course Schedule EDW - STU - Course Schedule EDW R&A Training EDW - STU Registration Limited (PR EDW - HR Headcount FTE Universe EXCEI Applicant Scholarship Data xls BEX Select a BEx query as a data source If Analysis View Pick an Analysis View as a data so	le 4/1/15 1:29 PM 4/1/15 8:53 AM 3/25/15 2:23 PM 3/25/15 2:22 PM 3/15/15 2:13 PM) 3/15/15 2:10 PM 3/15/15 1:57 PM 3/15/15 2:16 PM e.	P More P More P More	□ Today Image: Crees-Monthly (correct Image: Crees-Monthly2 (4) Image: Image: Crees-Image: Crees-Image Image: Test Image: Crees-Image: Crees-Image: Crees-Image: Crees-Image Image: Crees-Image: Cre	cted) 30 Ki 28 Ki onthly2 29 Ki 37 Ki 138 Ki Iluation_v06g_R 390 Ki	3 4/1/15 1:50 PM 3 4/1/15 1:41 PM 3 4/1/15 1:22 PM 3 4/1/15 10:17 AM 3 3/31/15 10:47 AM 3 3/31/15 9:49 AM
			[Connection Status	

Note: When you start Web Intelligence from the desktop, you will not be connected to the server. You must login to Web Intelligence before opening and refreshing reports. Note the status in the bottom right corner shows "Disconnected"

Login to Web Intelligence (Connecting to the Server)

1. Open the **Web Intelligence** menu in the upper left corner of the screen.

2. Select Login as...



- 3. Enter your University NetID and Password.
- 4. Verify that the Authentication field is set to LDAP.

SAP Business			
Web Intelliger	sObjects nce		
Enter your user information and	click Log On.		
<u>S</u> ystem:	v4.ad.uillinois.edu:6400 (J2EE Portal) v]	
<u>U</u> ser name:	NetID		
Password:	•••••		
<u>A</u> uthentication:	LDAP T		
	Use in <u>O</u> ffline mode		

5. Click Log On

You are now logged in to Web Intelligence and connected to the server.

Creating a New Document

Most reports will be created using a universe. A universe is an interface to the database that contains objects, which are tied to columns in database tables. Related objects are organized into folders that are called classes. A universe also can contain predefined query filters.

1. Choose a data source by selecting the <u>Universe</u> link or select the universe from your recently used universes in the list.



2. Select the desired Universe from the list and click Select.

elect a	universe for the query.			
EDW				
LUW				
vailable	e Universes:		Refresh univ	erse list
State	Name	Revision	Folder	
~	EDW - The Sulary Hannel	50		*
	EDW - RA Contact Analysis Data Mart	56	@QA41\RA Universes	
	EDW - STU Academic Records	195	@QA41\RTA Universes	
	EDW STU Course Catalog	02	@QA41Codebook Universes	
ě	EDW STU Course Schedule	173	@0A41Cat Sched Universes	
ŏ	EDW - Student Financial Aid	310	@0A41\Einancial Aid Universes	
õ	EDW - STU Records Directory	174	@0A41\RTA Directory Universes	
D	EDW - STU Registration Census	230	@QA41\Reg Census Universes	
C)	EDW - STU Registration Complete	325	@QA41\PRR Universes	
	EDW - STU Registration Directory	104	@QA41\PRR Directory Universes	
	EDW - STU Registration Instruct Asg	102	@QA41\PRR Instructor Universes	
	EDW - STU Registration Limited (PR)	294	@QA41\PRR Limited Universes	
	EDW - STU Web Applications	42	@QA41\Web Applicant Universes	
	EDW - Undergrad Admissions DataMart	57	@QA41\RA Universes	v
4	111			•

The Query Panel is displayed:



Query Panel Overview

Query Panel Toolbar:



- 1. Add Query Use drop-down menu to select data source for additional queries.
- 2. Hide / Show Data Preview Panel
- 3. Combine Query Select from Union, Intersection, or Minus
- 4. Query Properties Name query, set limits, change prompt order, turn off retrieve duplicate rows.
- 5. View Script View the SQL script for query
- 6. Run Query

Universe Outline:

The Universe Outline displays all of the classes and objects in the universe.

Searching for Objects and Filters

1. Enter and word(s) that are contained in the name of the object you are looking for.



2. The Universe Outline will be filtered to only show classes, objects, and predefined filters that contain that text.

Expand All / Collapse All

You can expand the classes by clicking the triangle next to the folder icon. You can choose to use the Expand All feature to expand all classes and objects, and the Collapse All feature to collapse all classes and objects.

- 1. Click **Expand all** 🖽 to expand all folders in universe outline.
- 2. Click **Collapse all** ^{[=]†} to collapse or close all folders in the universe outline.

Result Object Panel

The data for objects in the Results Objects panel will be returned when the query is run. To add objects to the Results Objects double-click the object or drag and drop the object from the Universe Outline into the Result Object Panel.



Removing Objects from Result Objects

To remove one or more objects from the Result Objects panel:

- 1. Click the \times button to remove selected object.
- 2. Click the $\stackrel{\scriptstyle \scriptstyle \times}{}$ button to remove all objects.

Query Filter Panel

Filters allow you to limit the data returned by your query. There are two types of Query Filters: **predefined** and **user-defined**. Predefined query filters are filters are saved in the universe. User-defined query filters are created using any of the objects in the universe.

Using Predefined Query Filters

1. Locate the predefined query filter.



2. Double-click the filter, or drag and drop it into the Query Filter panel.



Creating User-defined Query Filters

Query filters are composed of three components:

- The Object (What do you want to compare or filter?)
- The Operator (How do you want to compare the data?)
- The Operand (What would you like to compare the data to?)

To Create a Filter:

1. Drag and drop the desired object into the Query Filters panel.



2. Click the operator drop-down menu to select an operator. The default operator is In list.

Section Enrollment	In list	Ŧ
	In list	٠
	Not in list	
	Equal to	Ξ
	Not Equal to	
	Greater than	_
	Greater than or Equal to	
	Less than	
ata Preview	Less than or Equal to	Ŧ

3. Click the **Operand Menu** button at the end of the filter to specify how to enter the operand. Options include: Enter a Constant, select values from the List of Values, or create a Prompt.



4. To enter a constant, enter the value(s) for your filter in the text box. To enter multiple values, use the semi-colon (;) to separate values. Remember that values must be entered exactly as they appear in the database and are case-sensitive.

Section Enrollment Greater than 🔹 0 📰 🗄 👻

5. To use Values from List, select the value(s) from the list, then click the > button. Click OK.



6. If using the Prompt option, click the Prompt Properties **button** to change the way your prompt functions. You may also modify the prompt text in the text box.

🔰 Course Number Level In list 🔹 Enter value(s) for C 💱 🗄 📼

Grouping Filters

To group two or more filters together to link with the 'or' logical operator:

1. Create filters to group.

70	Query Filters
	Select Term Code
	Y Current Section Enrollment
And	Instructor First Name Is not null
	Section Enrollment Greater than • 0 🗐 📰 •

2. Drag and Drop one filter on top of the other.



Note:

The system no longer shows the Blue Rectangular indicating that the filters will be grouped.

3. Click the 'And' operator to change to 'Or'.



Data Preview

Provides a preview of the data that will be generated once the query is run. Gives you an idea if your query is set up correctly without having to wait for the full query to generate. If this area is empty, Click

Refresh to generate the preview. (Optional)

	Or Inst	tructor First Nam	e Is not null	•			
🔠 Da	ta Preview						Sefresh
Course	Subject Code	Course Number	Section Number	Section Enrollment	Instructor Last Name	Section Building Name	Section Room Numb
COMM		491	AU	1	Howes	Grad Sch of Lib & Info Science	131
COMM		491	AU	1	Howes	Grad Sch of Lib & Info Science	126
сомм		491	AG	2	Howes	Grad Sch of Lib & Info Science	131 😑
сомм		491	AG	2	Howes	Grad Sch of Lib & Info Science	126
00100		004		~		o 101 (13 017 0 1	400
4				111			•
Q- T)	/pe a text to fil	ter the values					

Answering Prompts

If your query contains prompts, the prompt window will be displayed when you run your query.

	Enter value(s) for Course Number Level	
* Select 6 digit Term Code 120048	Type a value:	Selected Value(s)
* Select Course Subject Code COMM		
Enter value(s) for Course Number Level	Course Number Level 000 100 200 300 400 500 600 N/A	
	January 26, 2015 3:43:27 PM GMT-06:00	<i>6</i> 40 ~

There are two methods for entering values in the Prompt Window:

- **Type a Value box**: Manually enter a value in this box. Remember that values must be entered exactly as they appear in the database and are case-sensitive.
- Select Value(s) from the List: select values from the list of values that is populated from the database.
- When you have answered all prompts, click **OK** to run the query.

Report Manager Window

Once your query has run, the report will be displayed in the Report Manager window. This window has many toolbars and tabs that contain the various features available in Web Intelligence.

🧈 w	🤟 Web Intelligence Rich Client - [TRISHAK - @URBBOE41QA3.AD.UILLINOIS.EDU:6400 Connected (HTTP)] - for training docs *								
	File Properties	Rep	ort Element	Format Da	ata Access	Analysis Page Se	tup	Reading Des	ign - Data 💮 - 🛞 - 🗴
B	🗁 • 🔚 • 📇 🏦 🖂 •	Filter	s Data Trackin	9		Display Condition	onal	Interact Functio	ns
×	ر 🏽 🖞 - ا 🄊 🗠 🗙 ا	Y Filte	r 🝷 🕴 🚹 Rani	king 👻 🛛 🗮 Ir	nput Controls 🝷	Group 👻 📔 Brea	k ▼ At Sort ▼	😨 Drill 🔹 🍄 Filter	Bar ∉⊟ Outline
	Available Objects 👻	~	🖆 📽 🗙 🗸						×
P .	Type here to filter tree								<u>^</u>
	for training docs								=
	Course Subject Code				_				
<i>S</i>	Section Enrollment Section Number				Rep	ort 1			
	Section Room Number								
	Section Building Name Variables		Course Subject Code	Course Number	Section Number	Section Building Name	Section Room Number	Section Enrollment	
			СОММ	100	D			0	
			COMM	101	A	Wohlers Hall	236	23	
			COMM	101	В			0	
			COMM	101	С			0	
			COMM	101	D			0	
			COMM	101	E	Gregory Hall	123	26	
			COMM	101	F	Gregory Hall	123	25	
			COMM	101	L			0	< 1 ▶
			COMM	101	М			0	▼
	Arranged by: Alphabetic order 🔻		Report 1		111				
Rep	ort 1 👻		Track Ch	anges: Off 📕	Page 1 of 1	+ 🕨 🗎 📰 1	00% + 🤍 🥅	U _ @	42 minutes ago. 🗐 Connected 💥

File Tab

Create a New Document – Will prompt you for a data source for new document.

Open an Existing Document – Will allow you to browse your files to open a document.

Save Document – Allows you to save your document as a Web Intelligence Document, Excel, PDF, CSV, or Text file. Also allows you to save document to ypur personal folders in EDDIE.

Print – Print your document

Find Text in Document – Search for particular text within the dcoument.

Export Data – Export the report data as a CSV file.

Send Document as an Email Attachment – Opens a new Outlook message and attaches the report. Choices to send as Web Intelligence, Excel, PDF, CSV or Text.

Properties Tab



View – Allows you to view and hide the various menu bars.

Document – Document Properties including Refresh on Open.

Application – Set Web Intelligence options (Change Default folders, default measurement unit, etc)

Document Toolbar

×	D 13 -	5	∝ X 🗗	3	
	-				

- **Cut:** Cuts the selected report elements and stores the contents in your Clipboard.
- **Copy:** Copies the selected report elements and stores the contents in your Clipboard.
- Paste: Pastes the selection stored in your Clipboard.
- **Undo:** Undo your last action(s)
- Redo: Redo an action that you had used the Undo action on.
- **X** Delete: Deletes the selected report element(s).
- **Edit Query:** Opens the Query panel so you can make changes to your query.
- **Refresh Data:** Refreshes the report data. Allows you to change Prompt Values.

Left Sidebar Panel

The left sidebar is used to display information related to your Web Intelligence documents: Document Summary, Report Map, Input Controls, Available Objects, and Document structure and filters. To switch between these different views, you can use the toolbar on the left, or the drop-down menu on the top of the menu.



Document Summary – Shows information about the document such as file size, authoer, date created, and refresh and modify dates.

Report Map – Map of the document allows you to see an outline of all the reports and elements within the document.



1

Ŀ

Input Controls – Create and view input controls.

Available Objects – Shows available objects and variables for the document. Can be arranged in Alphabetic order, or by Query using the drop-down option at the bottom of the panel.

0	Query	
•	Alphabetic order	
Arran	ged by: Alphabetic orde	er 🔻

Document Structure and Filters – View the structural elements of the document as well as any report filters that are applied to the reports.

Status Bar

The Status Bar is located at the bottom of the Web Intelligence Report Manager window.

Track Changes: Off 🕴 🖣 Page	e1 of 1 🕨 📕 🗐 100% 👻 🤍 🦳 🔍 🍳 😂 15 minutes ago. 🗐 Connected
Page Navigation:	Shows the current/total page of document. Use arrows to naivgate to other pages. (First page, Previous page, Next page, and Last page)
Print Preview:	buttons allow you to toggle between print preview and quick display mode.
Refresh:	Displays the time elapsed since last refresh. Click the Refresh button to refresh document.
Connection Status:	Shows the server connection status. Options are <i>Connected</i> or <i>Disconnected</i> . If disconnected, you will not be able to refresh document. Click the status to login to server.

Saving a Document as Web Intelligence

- 1. In the **File** Tab, click the **Save** drop-down menu.
- 2. Select Save as



- 3. Select location to save to
- 4. Name the document
- 5. Check the **Save for All Users** and **Remove Document Security** checkboxes. (Enables other users to open and refresh the document).

6. Click Save

Save Document	€ ×
Save in: 📦 userDocs	v 😥 🗞 📁 💷
Image: Weight of the section s	Description:
File Name: Section Enrollment Counts	
т воз от туре. Тутер влешуетсе росстветс	Save

Saving to Other File Formats (Excel, PDF, CSV, and Text)

- 1. In the File Tab, click the Save drop-down menu.
- 2. Select Save as



- 3. In the Files of Type drop-down menu, select desired file type. Options include:
 - PDF
 - Excel 2007 (.xlsx)
 - Excel (.xls)
 - CSV
 - Text
- 4. Select a location to save to and modify the file name if needed.
- 5. Click Save

Saving Documents to EDDIE

The Save to Enterprise option allows you to save a copy of your document to the EDDIE repository.

1. From the **File** tab, select the 🔲 save drop-down menu

2. Click Save to Enterprise

Save Document				?
My Desktop My Analysis My Analysis My Documents My Computer My Computer	Folders Categories Home My Favorites Image: State of the s	X 🗋 🗞	Search title Title FIGL_Detail_General_Ledger_Statement FIGL_Operating_Ledger_Summary	▶ 207 KB 207 KB 161 KB
	Name Section Enrollment Counts		Save	Advanced Cancel

- 3. Select the folder or Category to save document to
- 4. Click Save

Refreshing a Document

To refresh your document, or to bring up the prompt window to change prompt values:

1. Click the Refresh Button. You can find this button either on the left sidebar toolbar, or on the toolbar on the bottom-right of the document.



Note: If the Refresh buttons are inactive or grayed-out, you may be working in Offline mode. See <u>Appendix B: Trouble-shoot Common Issues</u>

Editing a Query

To view or make changes to the query:

1. Click the 📴 Edit Data Provider button located on the left sidebar toolbar or in the Data Access Tab.



The Query Panel will be displayed:

📋 Query Panel		3 ×
👔 Add Query 🕶 🖬 🖬	🤣 🐨 🗈	Run Queries 🔹 🚮 Close 🕶
Vuriverse outline Master Perspective Type here to filt Type here to filt For Counts For Counts For Time For Section Information For Normation For Conditions For Conditions For Prompts	Image: Section Provided and Provided An	Section Enrollment Jom Number Image: I
📴 Query 1 📋 Query 2		4 ▷ 🗉

2. If you have multiple queries, select the tab for the query you would like to view or edit.

Adding Objects to an Existing Query

If you need to add additional objects to an existing query:

- 1. Click the ᅞ Edit Data Provider button.
- 2. Locate the object(s) to add and add them to the Result Objects panel.
- 3. Run the Query.

Note: You will notice that the new object is not displayed in your report table.

Adding objects to a Table

- 1. Open the Available Objects menu.
- 2. Drag the new object into the table.
- 3. Use the blue rectangles to determine the location of the new column:

I	236
	236
I	236

Insert column to the left of current column

Insert column to the right of current column

Replace column with new column

Sorting

By default, tables are sorted by dimension and detail columns, left to right in ascending order. There are two methods for adding sorts to a table:

Right-click Menu

- 1. Right-click in the column to apply sort.
- 2. Select Sort.
- 3. Select the desired sort order (Ascending or Descending).



Toolbar Option

- 1. Select the column to sort on
- 2. Select Analysis > Display
- 3. Click the **Sort** drop-down menu
- 4. Select the desired sort order (Ascending or Descending)

rs Data Tracking er ▼ 🏭 Ranking c [#] 🗳 X ✔ =	· ▼ ≣E Input [Section Enroll	Controls - G ment]	roup - = Br	eak	Al Sor	t - None	Σ Sun	n -	n Cou	nt
		Repo	<u>rt 1</u>		Z¥ Z↓	Asc Desc Rem Adv	ending cending ove All Si anced	orts		
Course Subje	Course Numt	Section Num	Instructor La	Section	Build S	Sectio	n Roon	Secti) ion Enr	ol
								_		

Changing Sort Priority

If a table has multiple sorts applied, you can use the Advanced... sort option to change the priority of the sorts:

1. From the Sort menu box, select Advanced

Vertical Table: Block 1 Section Enrollment	Priority:
Course Number	
	Order:
	A Descending T
	Sort:
	Add
	Remove
	Custom Order:
	Values
	Reset
• [

- 2. Select the object to change sort priority
- 3. Under Priority, click the \blacktriangle or \blacktriangledown button

Create a Custom Order Sort

1. From the Sort menu box, select Advanced

Vertical Table: Block 1	Priority:
Section Enrollment	
Course Number	
	Order:
	ZA↓ Descending ▼
	Sort:
	Remove
	Custom Order:
	Values
	Reset

- 2. Under Custom Order, select Values button.
- 4. Use the click the \blacktriangle or \checkmark button to rearrange the order of the sorting.
- 3. When finished, click **OK**

values to add in list:	Customized ascending list:	
Type new value here	Armory Davenport Hall Foreign Languages Building Grad Sch of Lib & Info Science Gregory Hall Krannert Center for Perf Arts Lincoln Hall Mechanical Engineering Bldg Noyes Laboratory	

Sections

Sections divides your report into parts, one for each value for the object used to create the sections. There are two methods to create a section within a report table:

Right-click Menu

1. Right-click in the desired column and select Set as Section



Toolbar Option

- 1. Click in the desired column
- 2. Select the Report Element > Tools > Set as Section



Breaks

Breaks divide a table into parts, one for each value of the object. The main reason to insert breaks is to get sub-totals at each break level. There are two methods to create a section within a report table:

Right-click Menu

1. Right-click in the desired column

2. Select Break > Add Break

bje	Course	Numt	Section Num	Section Enrol	Instructor La	a Section Build S
	101		<u>.</u>	~ *	Coane	Gregory Hall 1
	101	×	Cut	Ctrl+X	avsky	Gregory Hall 1
	101	D	Сору	Ctrl+C	imison	Gregory Hall 1
	101	ß	Paste	Ctrl+V	avsky	Gregory Hall 1
	101		Paste Special.	Ctrl+Alt+	v alagreca	Gregory Hall 1
	101		Insert	25.	alagreca	Gregory Hall 1
	199	x	Delete	Delete	erry	Gregory Hall 1
	201		Clear Contents		owney	Grad Sch of L 1
	317	.	Clear Contents		erone	Gregory Hall 1
	320	B 1	Set as Section	86	astronardi	Krannert Cen 2
	320	1	Turn Into		Idivia	Gregory Hall 1
	320	f _x	Edit Formula	Ctrl+Ente	r aldivia	Gregory Hall 1
	331		Linking		erone	Gregory Hall 2
	351		Start Drill		olina	Gregory Hall 1
	356		Group	e.,	ess	Noyes Labora 2
	356	v	Filter	- C.	ess	Noyes Labora 2
	364	*1	Dealise	100	n	Noyes Labora 1
	364	06	Ranking	100	Chesney	Noyes Labora 1
	364	2+	Sort		ckard	Neves Labor: 1
	375	-	Break			dd Break
	391		Hide	1	Re	emove Break
	391		Text		Re	emove All Breaks
7			Format Cell		Ma	anage Breaks

Toolbar Option

- 1. Select the column for desired break
- 2. Select Report Elements > Table Layout > Break > Add Break



Managing Breaks

To manage the way a break is displayed or the properties for a break:

- 1. Select the column that contains the break.
- 2. Right-click and select **Breaks** > **Manage Break**

Manage Breaks		? ×
Block 1	Course Number Display Properties Break header Break footer Apply Sort Duplicate values Display first Page Layout	Ţ
	Add Start on a new page Add Avoid page breaks in block Remove Repeat header on every page	
	OK Cancel App	ly

- 3. From this menu, you can:
 - Add additional breaks and manage the priority of breaks
 - Remove breaks
 - Turn on/off break headers and footers
 - Turn on/off sorting on breaks
 - Change the way duplicate values are displayed within a break
 - Avoid page breaks within a break
 - Have header row repeated at the top of each page

Inserting Calculations

There are two ways methods to insert a calculation into a report:

Right-click Menu

- 1. Right-click in the column for desired calculation
- 2. Select Insert
- 3. Select the desired calculation



Toolbar Option

- 1. Select the column for desired calculation
- 2. Select Analysis > Functions
- 3. Select either Sum, Count, or More (Average, Min, Max, and Percentage)



Inserting Predefined Cells into Report

Web Intelligence provides several predefined cells that can be added to enhance your reports. The following cells can be found in the Report Element toolbar tab:

Available Predefined Cells

Document Name	Displays the Document Name
Last Refresh Date	Displays the date the report was last refreshed
Drill Filters	Displays all applying drill filters (using the Filter bar)
Query Summary	Displays a summary of the query including the Universe name, object descriptions, and number of rows returned.
Prompt	Displays a summary of all prompts, or individual prompts
Report Filter Summary	Displays all report filters that are applied to a report

Page NumbersDisplays the page number on the report. Can also include total number of
pages.

Adding a Prompt Summary

- 1. Select the Report Element toolbar tab
- 2. Select the **Cell** sub-tab
- 3. Select the Pre-Defined Drop-down menu button
- 4. Select Prompt > Prompt Summary



5. Click your mouse in the location to display the prompt summary

*** Query Name:Query 1 ***

Select 6 digit Term Code Select Course Subject Code Enter value(s) for Course Number Level (Optional)

Course Subject Code	Course Number	Section Number	Instructor Last Name	Section Building Name	Section Room Number	Section Enrollment
COMM	101	A	Sloane	Gregory Hall	113	24
COMM	101	В	Elavsky	Gregory Hall	113	26
		_				

6. Click on the **Format** toolbar tab to change the font and cell formatting for the Prompt Summary



Creating Additional Report Tabs

Web Intelligence allows you to create additional reports that can be used to display the data from your query in different ways.

You can create additional reports in two ways:

- Duplicate an existing report and then modify the new report.
- Add a new blank report, and then build the report by adding a template or dragging objects into the blank report.

Duplicating a Report

- 1. Right-click on the Report tab
- 2. Select Duplicate Report from the menu



Rename a Report

- 1. Right-click on the Report Tab
- 2. Select Rename Report.
- 3. Enter the new Report Name in the New Value box.

4. Click **OK**.

Note: When you rename the report tab, the report title is automatically updated.

Filtering a Report

Web Intelligence offers several ways to apply filters to a report. In this section we will cover how to use Report Filters, the Filter Toolbar, and Input Controls to filter the data displayed in reports.

Using Report Filters

There are two methods for accessing the Report Filter feature:

1. Right-click in the column that you wish to filter, then select Filter > Add Filter

Grad		Group	. *		
Greg	7	Filter	٠	7	Add Filter
Greg	đЪ	Ranking	•	7	Edit Filter
Greg	₽↓	Sort		*	Remove Filter
Greg	-	Break			Filter by a New Input Control
ore					

 Select the column that you wish to filter, then on the toolbars, select Analysis > Filter > Add Filter

Rep	port Element Format Dat	ta Access	Analysis Page Setup
Filter	Data Tracking		Display Conditional
Y Filte	er 🔻 📇 Ranking 👻 📲 In	put Controls 🔻	Formatting Rules - New Rule
7	Add Filter	lding Name]	
>	Edit Filter		
۴	Remove Filter		
	Filter by a New Input Control	Der	

3. Select the operator to use for filter.

Repo	ort Filter			
» в	Block 1			
Γ		·		
	🍫 Section Building Name	In list	Ŧ	
		In list		
		Not in list		
		Equal to	=	
		Not Equal to	-	
		Greater than		
		Greater than or Equal to		
		Less than		
		Less than or Equal to	$\overline{\mathbf{v}}$	

4. Select the value(s) from the list of values. You must either double-click each value, or select the value and click the > button to move it to the list of Selected values.

Type a value:				Sele	cted Value(s)
	2	1		>	Noyes Laboratory
Section Building Name				<	
Armory					
Davenport Hall					
Grad Sch of Lib & Info Science					
Gregory Hall					
Krannert Center for Perf Arts					
Lincoln Hall Mechanical Engineering Bldg					
Noves Laboratory					
Enter search pattern		đ	a -		
					OK Cancel Apply

5. Click Ok

Using Simple Filters on the Filter Bar

Another way to filter a report is to add objects to the Filter Bar. This creates a more interactive filtering experience and can be used to drill-down within a report table.

Displaying the Filter Bar

There are two methods to displaying the Filter bar:

- 1. Right-click anywhere in the toolbar area
- 2. Click Filter Bar



OR

- 1. Select the Properties tab
- 2. Select View > Filter Bar



Add Filters to the Filter Bar

1. Drag and Drop objects from the Available Objects list to the filter bar.



2. Use the drop-down menu on the filter bar to add objects.



3. Repeat to add a filter for other objects.

đ	ê 📫 >	< ✓							
<mark>7</mark> ∓	- 🖊	Berry		•	All Se	ction Building Nar	ne 🔻		
		Berry							
		Brewe	r	Ξ					
		Caban							
		Caughl	in						
		Chamb	ers		-				
		Christia	ins		Repo	<u>rt 1</u>			
		Cook							
۱.		Davis		Ŧ					
	Cours	e Subje	Course Numb	Se	ction Num	Instructor La	Section Build	Section Roon	Section Enrol
	COMM	I	199	J		Berry	Gregory Hall	123	18
	COMM		391	VVE	ΞB	Berry			1
	COMM		590	VVE	ΞB	Berry			1
	COMM		599	VVE	ΞB	Berry			0
								Sum:	20

4. To filter the report, select values from drop-down filter boxes.

Input Controls

Input Controls allow you to filter your data interactively using many types of controls, such as Radio Buttons, Drop-down lists, checkboxes, and slider bars.

- 1. There are two methods for creating a new Input Control:
 - a. Right-click in the desired column to filter
 - b. Select Filter > Filter by a New Input Control

eg	Linking	۲		
ad 🔽	Start Drill	21		
eg	Group			
eg 🔽	Filter	*	7	Add Filter
9 đh	Ranking	٠	->	Edit Filter
eg Al	Sort		Ť	Remove Filter
e =	Break			Filter by a New Input Control

OR

a. On the toolbars, select Analysis > Filters > Input Controls.



2. Verify that the correct object is selecting and click Next.

Define Input Control	?	×
Select Report Object Select the report objects used to filter data		
Section Enrollment Counts Course Number Course Subject Code Instructor Last Name Section Enrollment Section Number Section Room Number Section Building Name Variables		
Arranged by: Alphabetic ord	er 🔻	
<< Previous <u>N</u> ext >> Can	cel	

- 3. Select the desired control type from the menu to the left.
- 4. Modify any properties needed, based on the control type selected.
- 5. Click Next.

Single value	Use radio buttons to allow a l list of possible value. All alter the chosen value is ticked.	user to select one value from a natives are always displayed:
E Combo box		······································
Check boxes Check boxes List box	 Input control propertie Label Description List of Values Use restricted list of value Default value(s) Allow selection of all valu Operator Number of lines 	S Section Building Name All values from report Yes Yes Equal to

6. Select the report elements that should be controlled by the new input control.

Define Input Control	? ×
Assign Report Elements	
Select report elements to assign them to the input control	
Report object 🍂 Section Building Name 🛛 Control 🚦 Radio buttons	
Report 1 Page Header Page Body Provential Table: Block 1 Page Footer	
<< Previous <u>F</u> inish Can	cel

7. Click Finish.

The new Input Control will be displayed in the Input Control menu on the left sidebar.

	Input Controls - «	_ ^f * <mark>=</mark>	°× ✓	=[Section Buildi	ng Name]			
E	≡⊠ New Map Reset							
	Section Building Name 🌣							
•••	All values Amage				Repo	<u>rt 1</u>		
	Armory Devenent list	60	uree Cubi	Course Num	Continu Num	Instructor Lo	Contine Duild	Continu
			urse subj		Section Num	Instructor La	Section Build	Section
	Foreign Languages Building	CC	MM	425	A3	Ueno	Armory	430
	Grad Sch of Lib & Info Science	CC	MM	425	A4	Ueno	Armory	430
	Gregory Hall	CC	MM	435	JCU	Caughlin	Armory	328
	C Krannert Center for Perf Arts	CC	MM	435	JCG	Caughlin	Armory	328
	C Lincoln Hall							Sum:
	 Mechanical Engineering Bldg Noyes Laboratory 							

8. Select value(s) to filter the report.

Editing or Removing an Input Control

1. In the Input Control sidebar, hover mouse over the title of the control



- 2. Click 🕙 to edit the control
- 3. Click 💌 to remove the control

Creating Variables

A variable is a formula with a name associated with it. Variables allow you to combine data for different objects or use part of the data for an object. There are two methods for bringing up the Create Variable window:

1. From the Available Objects menu, right-click on the Variables folder and select Create New Variable.



2. From the toolbars, select Data Access > Data Objects > New Variable.

Report Element Format Data Access	Analysis Page Setup
Data Providers Tools	Data Objects
🔂 Change Source 🔹 🖾 Export Data 🔹	📑 New Variable 🔹 💋 Merge

The Create Variable window is displayed.

Create Variable	e			3
Variable Defin	ition			
Name:				
Qualification:	Dimension			Ŧ
Туре:	string			
Formula —				
				1
				×
E Section	n Enrollment Counts 🔺	- fx GetLocalized	= < <= >>= > + - / * ; ()
E 😼 Section	I Enrollment Counts Irse Number Irse Subject Code	fx GetLocalized	= < <= >> >> + - 1 * ; ()
Inst	ructor Last Name	fx If fx InitCap	Prompts	•
Sec	tion Room Number	- fx IsDate	After	
4			Δnd	•
Description				
Section Enrol	Iment al of actual enrollment i	n a section.		
			OK Canc	el

- 3. Enter the name of the variable.
- 4. Select the Qualification for the variable. (Dimension, Detail, or Measure)
- 5. If you are creating a Detail, select the Associated Dimension by clicking the 🔜 button.

- 6. Enter the forumla for the variable in the **Formula box.** Use the **Available Objects**, **Functions**, and **Operators** lists to assist in writing the variable formula.
- 7. Click the 🗹 button to validate your formula.
- 8. Click **OK** to exit and save your variable.

Displaying a List of Values in the Variable Editor

If you are inserting values for a particular object into the variable formula, you can choose the values from the list of values:

1. Select the Object from the Available Objects list.



- 2. Double-click the Values option under Operators.
- 3. Select the value(s) to add to the formula and click OK

List of Values			⊘ ×
UIN			
650096105			*
654100733			
655497269			
661983930	-		
671849870			
671948354			
672582543			=
673080953			
673948695			
674429730			
675011135			
677131749			
678868495			
670301/83			•
Enter search p	attern		M -
		ОК	Cancel

Grouping

Web Intelligence allows you to create Grouping variables to group your data. For example, you can create groups based on the number of students enrolled in a course, or categorize transactions.

1. From the Toolbars, select Analysis > Display > Group

Report Element Format Data Access	Analysis Page Setup
Filters Data Tracking	Display Conditional
🍸 Filter 🔻 🏭 Ranking 💌 📲 Input Controls 🔻	Group • = Break • A Sort •

(or right-click in the column to group, and select **Group** > **Manage Groups**)

- 2. Enter a name for the grouping variable (For example: "Enrollment Levels")
- 3. Select values to include in the first grouping.

Group	Nove to + Un	group			Ungrouped Value
	Section Enr	ollment		Groups	s:
0					
1					
2					
3					
4					
5					
7					
9					
10					
11					
12					
13					
14					
Type here to	filter values	æ	All Groups		• 1 7

- 4. Click the Group button.
- 5. Enter a name for the new group and click **OK**.



6. Repeat steps 3-5 until all groups have been created.

lame Enrollment Levels	
Group Move to * Ungroup	Ungrouped Values
Section Enrollment	Groups:
0	Low Enrollment
1	Low Enrollment
2	Low Enrollment
3	Low Enrollment
4	Low Enrollment
5	Low Enrollment
7	Average Enrollment
9	Average Enrollment
10	Average Enrollment
11	Average Enrollment
12	Average Enrollment
13	Average Enrollment
14	Average Enrollment
17	High Enrollment
18	High Enrollment
21	High Enrollment
Type here to filter values	All Groups 🔻 🅒 🗙

- 7. To manage ungroup values, click the **Ungrouped Values** button. There are two options for ungrouped values:
 - a. Check **Visible** to see the actual value.
 - b. Check **Automatically Group** to assign a group name for all ungrouped values. The default group name is "Other".

	Ungrou	uped Values 💌
	- 7	Visible
Groups:		A . I
Low Enrollment		Automatically grouped
Low Enrollment		

- 8. Click **Ok** to exit Manage Groups window.
- 9. The Grouping will be displayed in the Variable folder in the Available Objects list.

	Available Objects 🕶	<i>∄</i> * 📽 × ✔ =	Enrollment Le	vels]			
	Type here to filter tree Section Enrolment Counts Course Number I Course Subject Code Instructor Last Name Section Enrolment			Repo	rt 1		
	Section Number Section Room Number	Course Subje	Section Num	Instructor La	Section Build	Section Roor	Enrollment Levels
2	Errollment Levels	COMM	AA	Aidman			Low Enrollment
		COMM	ALP	Press			Low Enrollment
		COMM	ANV	Valdivia			Low Enrollment
		COMM	BAW	Williams			Low Enrollment
		COMM	CC	Christians			Low Enrollment
		COMM	CRM	McCarthy			Low Enrollment

To manage an existing group:

- 1. Right-click in the grouped variable column.
- 2. Select Group > Manage Group

To manage a particular value:

- 1. Right-click on the value
- 2. Select Group
- 3. Select from options:
 - a. Move to Group
 - b. Ungroup
 - c. Rename Group

Merge Dimension

Merge Dimension allows you to synchronize data from multiple data providers into one table. Objects with common data values are merged so the data from each data provider can be combined into a table.

Step 1: Sort Available Objects by Query

1. Select the Available Objects list in the left sidebar.



2. At the bottom of the Available Objects panel, select Arranged by: drop-down menu.

3. Select Query



The Available Objects list will now be sorted by Query:

Available Obj	ects •	~
Type here to	o filter tree	
🖃 🚽 Class	Roster	
🚊 - 🛅 Qu	iery 1	
M	Attended Indicator	
🔰	Course Name	
🔰	Course Session Key	
🔰	Employee	
🔰	Instructor	
📁	SessionDate and Time	
🔰	Session Location	
M	UIN	
🚊 - 🛅 Qu	iery 2	
🔰	Employee UIN	
🖊	Employee Detail Campus Name	
🐴	Employee Detail Department Name	
💼 Va	riables	

Step 2: Merge Dimension Objects

Dimension Objects from difference data sources can be merged in two ways:

Using the Right-click Menu

- 1. In the Available Objects menu, select the first object to merge.
- 2. Hold down the CTRL key, and select the second object to merge. The object will most likely be grayed out, but you will still be able to select it.
- 3. Right-click on that object, and select Merge



The new Merged Dimension will be displayed in the Merged Dimension folder:



Using the Data Access Toolbar

- 1. Select the Data Access toolbar tab.
- 2. In the Data Objects tab, select Merge.



- 3. Select the first object to merge.
- 4. Hold down the **CRTL** key, and then select the second object to merge.



5. Click OK

The new Merged Dimension will be displayed in the Merged Dimension folder:



Step 3: Create Variables for Objects to be Displayed with Other Data Source

Business Objects has a rule that only objects from a single data source may be displayed together in a table (or block) of data. In order to join objects from multiple data sources into the same block of data, you must build Varaiables for each object, and those variables must be created as Details of the Merged Dimension.

1. In the Available Objects listing, right-click on the Variables folder

2. Select Create New Variable



Note: You may also select the **Data Access** toolbar tab, then select **New Variable** from the Data Objects menu.

3. Enter a name for the variable. You must use a distinct name. It cannot be the same as any of the objects in your query.

Create Variable	e	3 3
Variable Defin	nition	
Name:	Campus	

- 4. From the Qualifications drop-down menu, select Detail
- 5. Select the 🛄 button to the right of the Associated Dimension field.

Variable Definition		
Name:	Campus	
Qualification:	🍂 Detail	\frown
Associated dimension:	UIN	
Туре:	unknown	9

6. Change the **Arranged by:** option to **Query**

7. Select the Merged Dimension object from the list of available objects.



- 8. Click OK
- 9. Double-click the desired object from the Available Objects list in the variable window. The formula **=[object name]** will be populated in the Formula box.

Type: Formula =[Employee Detail Ca	unknown mpus Name]	
Available objects Session Locatio UIN Curry 2 Employee UIN Employee Detail Merged Dimensions UIN III	Campus Name	Functions Aggregate Aggregate All Character Character Data Provider Character Characte
Employee Detail Camp Name of campus of the e	ous Name employee's primary j	job.

10. Click **OK**

The new detail variable has been created and added to the Variables folder.

11. Drag and Drop the variable into the desired location in the Data Block.

🖻 📨 Merged Dimensions	0				
UIN	#	Attended	Employee	UIN	Campus
Employee UIN (Query 2) Variables Campus	1	No	Adams, Stephanie J	677214780	University Administration
• • • • • • • • • • • • • • • • • • •	2	No	Bodine, Amanda	052744034	niversity Administration
	3	No	Curry, Patricia Ann	673050632	🐟 =[Campus] University Administration
	4	No	Miller, Colleen Rose	6/50/53/10/367	University Administration
	5	No	Myers, Jerry D	000045300	University Administration

Report Formatting

Viewing the Print Preview (Page View)

To see what your document will look like when printed, change the view mode to Page Mode:

- 1. Select the Page Setup tab
- 2. Select the **Display** sub-tab.
- 3. Click the 🖻 Page button.

Data Acces	s Analysis Page Setup	Reading	Design - Data
Report	Page Header Footer	Scale To Page Margins Display	
B≱ (A Portrait - A4	Quick Display Max: 100 😫 Rows 20	Columns

Scaling (Fit to Page)

If your report has many columns, you can use the Scale to Page feature to easily fit your report to one page width.

- 1. Select the **Page Setup** tab.
- 2. Select the Scale to Page sub-tab.
- 3. Use the Width or Height drop-down menus to select the desired scale.

Report Element Format Data Access	Analysis Page Setup		Reading
Report Rename Report Move Report	Page Header Footer	Scale To Page Margins Display	
🗎 Add Report 🗎 Duplicate Report 🙀	A Portrait - A4	Width: 1 pages 🔻 Height: Automatic 🔻	ale: 100% 🔻

Changing Page Margins

- 1. Select the Page Setup tab.
- 2. Select the Margins tab.

3. Use the 🖆 to adjust each of the four margin settings.



Note:

You can also find report formatting options if you right click on any white-space on your report, then select **Format Report**.

Wrapping Text

- 1. Select the desired cell for Wrap Text. To wrap text in multiple cells, hold down the CRTL key while selecting cells.
- 2. Select the Format tab, then the Alignment sub-tab.
- 3. Click the **Wrap text** button.



Changing Row Height and Column Width

1. To adjust the column width, double-click on the right border of the column, or drag the border to the desired width.



2. To adjust row height, double-click on the bottom border, or drag the border to the desired row height.



Rearranging Columns

- 1. Click your mouse anywhere in the column that you would like to move.
- 2. Drag and drop the column to the desired location.
- 3. Use the blue rectangle to determine the new column location.

23	Dropping over the center of the cell will swap the location of the two columns
123	Dropping along the left border will insert column to the left of currently selected column.
123	Dropping along the right border will insert column to the right of currently selected column.

Deleting a Column

If you no longer want a column displayed in a table, you can delete it:

1. Select the column to be removed.



2. Click the Delete button (or right-click and select Delete)

Format Numbers

You can change how numeric values in certain cells or columns are displayed. By default, number formats are defined for the objects in the universe. Use Format Number to select another predefined format, or to create a custom format for numbers in your report.

1. Right-click in the column or cell that contains the number values to reformat.

2. Select Format Number



- 3. Select the type of number to be formatted (Number, Currency, Date/Time, etc.)
- 4. Select a predefined format, or click **Custom** to create a custom format.

Format Number		? ×
Default Number Currency Date/Time Boolean Percentage Custom	Sample 1,234.57; -1,234.57 1.234567E3; -1.234567E3 1235; -1235 1235; (1235) 1234.57; -1234.57 1,235; -1,235	
Custom		
	OK Cancel Appl	y

5. Click OK

Editing the Report Title

1. Double-click in the Report 1 cell.



2. Enter a new name in the formula editor box

G			
6	Section Enrollments	1	×₫×
¢	L.		

3. Click the Validate ✓ checkmark

Sec	ction Enrollment
Γ	Note: If you rename the report tab, the report title will be updated to match.

Conditional Formatting

You can set up conditions that will automatically format the data in your Web Intelligence documents to alert you to when values value fall below or above specific thresholds, or when certain strings appear.

- 1. Select the Analysis tab
- 2. Select the Conditional subtab
- 3. Click New Rule to create a new conditional formatting rule



- 4. Enter a name for the rule in the Name box
- 5. In the Filtered Object or Cell field, click the 📃 button
- 6. Select the desired object for the conditional formatting rule
- 7. Click Select an Object or a Variable

Filtered object or cell	Operator		Op	erands
Cell contents	Equal		• T)	/pe a value
the above is true, then	display:			Available objects
Cell contents		Fo	ormat	Section Enrollment Course Number Course Subject Code Instructor Last Name Section Number Section Number Section Number Section Number Section Sudding Name
	COMM	320	A	Variables
	COMM	320	AI	
	COMM	320	AI	
	COMM	322	S/	
	COMM	331	N	
	COMM	351	Е	Arranged by: Alphabetic order -
	COMM	356	А	OK Cancel
	COMM	356	в	

8. Select the object or variable from the list of Available objects and click OK

- 9. Select an operator from the Operator drop-down list.
- 10. Type a value in the Operand field, or click the 📃 button to select a value from the list of values.

Filtered object or cell		Operator	Operands	
Section Enrollment	1000	Less	10	X

11. Click the Format button to change the way you want the values to be formatted if the condition is true. (Default will be to display value in red text)

Display E	Backgrour	nd Image			
Background Border	Color : Pattern:	 No color Default None 	<u>ه</u> ب		
		Skin			Ŧ
		O Image from address:] ✓ × ⊵⁵×
		O Image from file:	Browse		
		Display: Position:	Left	• Тор	Ť
F	review				
		с	ell contents		

- To change the font and font style for text, click the Text menu
- To add a highlight or background color to the cell, click the **Background** menu
- To add a border to the cell, click the **Border** menu.

12. Click **OK**

- 13. To add another conditional rule, click the 🖶 Add... button.
- 14. When all rules have been created, click OK

Applying the Formatting Rule to a Table:

- 1. Select the column that the rule will apply to
- 2. On the Analysis > Conditional menu, select Formatting Rules drop-down menu
- 3. Check the rule you would like to apply to the column.



Name	Section Room Number	Section Enrollment
		3
		0
Hall	336	11
		0
		2
		0
		1
		1
Hall	123	21
Hall	123	17
		0

Example: Format all sections with an enrollment less than 10