

WebIntelligence™ 3.1

Webi Rich Client Reporting



CREATIVE TECHNOLOGY
& TRAINING SOLUTIONS

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Chapter Objective

- ◆ Upon completion of this chapter, the student should have an understanding of:
 - ◇ Creating Documents Using Universes, External Data Sources or by Importing Documents.
 - ◇ Creating Documents with Multiple Queries from the Same Universe.
 - ◇ Creating Documents with Multiple Queries from Multiple Universes.
 - ◇ Creating Documents with Queries from Both a Universe and an External Data Source

Logging Into Rich-Client

The screenshot shows the 'Web Intelligence Rich Client' login window. It features a central login form with the following fields and options:

- System:** A dropdown menu currently showing 'ctts15:6800 (J2EE Portal)'. Callout 1 points to this field.
- User name:** A text input field containing 'Administrator'. Callout 2 points to this field.
- Password:** A text input field for the user's password. Callout 2 also points to this field.
- Authentication:** A dropdown menu currently showing 'Enterprise'. Callout 3 points to this field.
- Use in Offline Mode
- Log On** and **Exit** buttons. Callout 4 points to the 'Log On' button.

To the right of the form is a blue sidebar with the 'Web Intelligence Rich Client' logo and the text 'Enter your login information then press logon'. The Business Objects logo is at the bottom of the sidebar.

1. Select System

2. Enter User Name and Password

3. Select Authentication (if necessary)

4. Click Log On

Creating New Documents-Using a Universe

OR-- Select from Previously Used Universes

5. Click to View Additional Data Sources

New Document

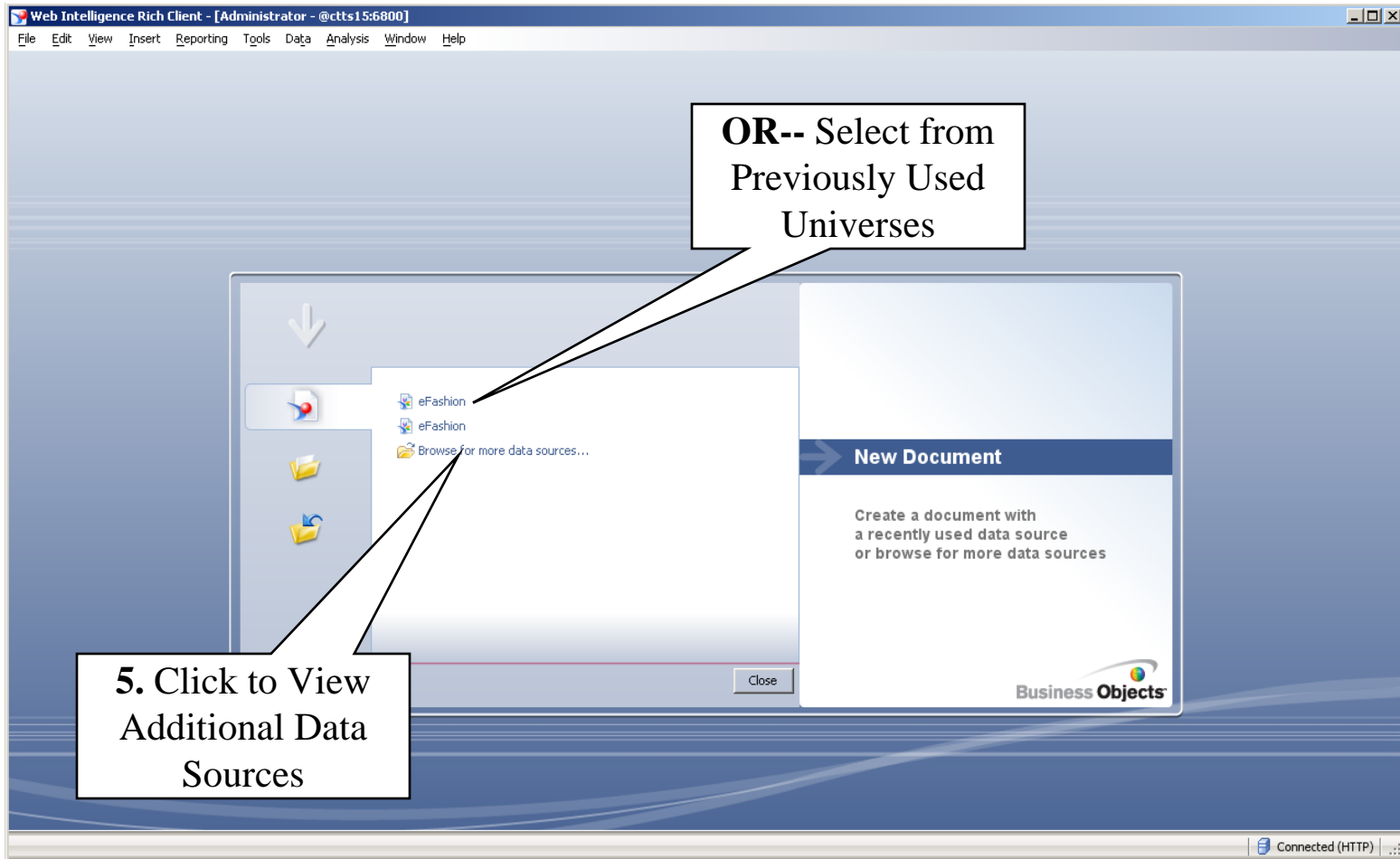
Create a document with a recently used data source or browse for more data sources

Close

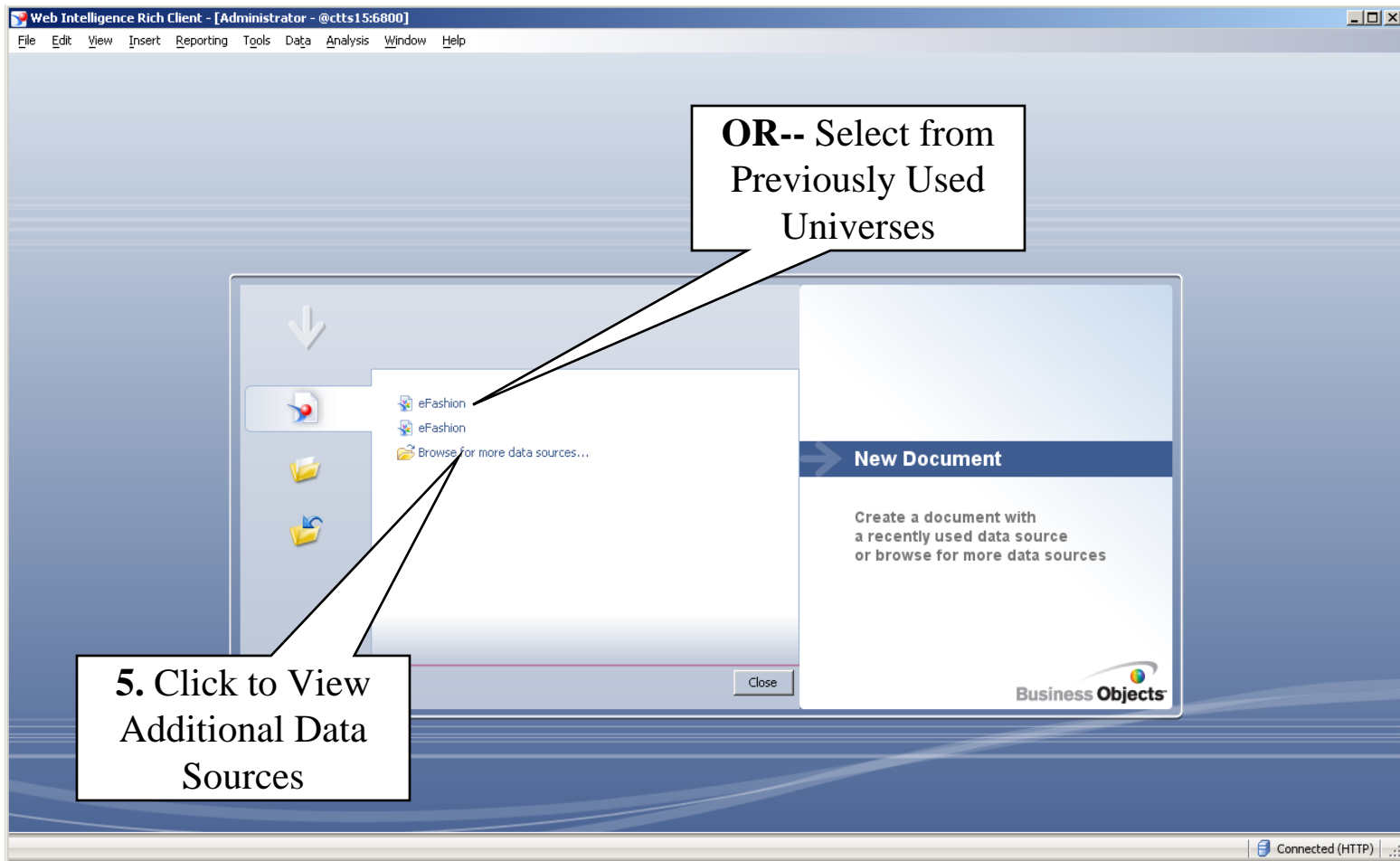
Business Objects

Connected (HTTP)

Creating New Documents-Using a Universe



Creating New Documents-Using a Universe



Creating New Documents: Using a Universe

New Document

Data source selection
Select the data access type

Universe

Local data source

Next >> Cancel

5. Select Universe

6. Click Next.

7. Select Universe

Universe

To access universe data, select a universe.

Available Universes:

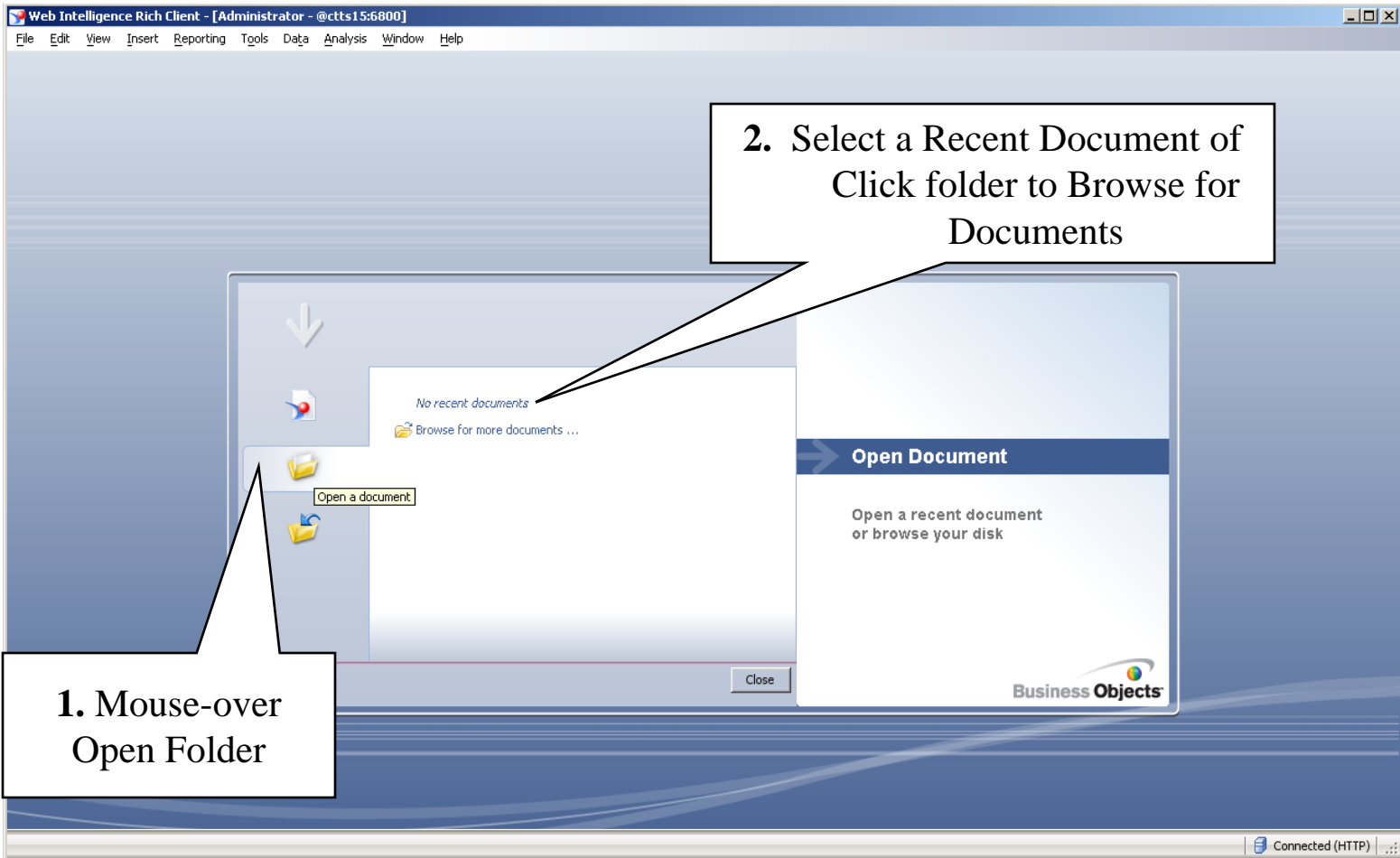
Name	Folder
Island Resorts Marketing	@ctts15_6800\webi universes
Report Conversion Tool Audit Universe	@ctts15_6800\Report Conversion Tool Universes
Island Resorts Marketing	@ctts15_6800\Training Universes
Northwind	@ctts15_6800\Training Universes
Island Resorts Marketing (2)	@ctts15_6800\Training Universes
Activity	@ctts15_6800\
eFashion	@ctts15_6800\webi universes
eFashion	@ctts15_6800\Training Universes
Northwind (2)	@ctts15_6800\Training Universes

Help on selected universe:
eFashion retail Data Warehouse. Oct 14, 1998. 89,000 row fact table.

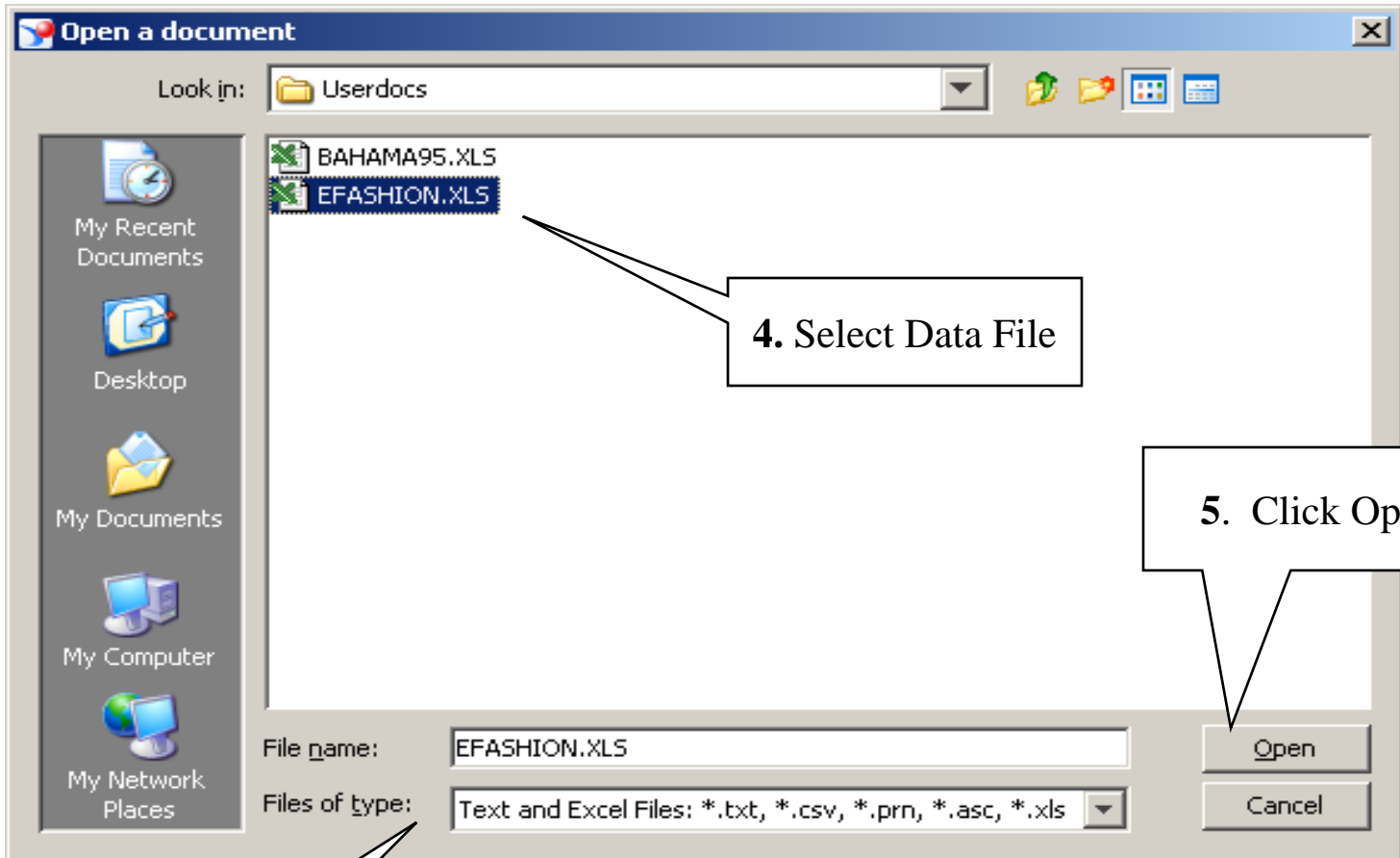
OK Cancel Help

8. Click OK

Creating New Documents: From Other Data Sources



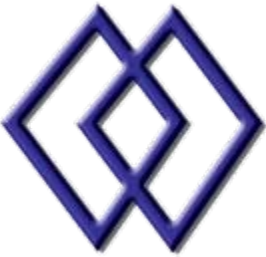
Creating New Documents: From Other Data Sources



3. Change File Type

4. Select Data File

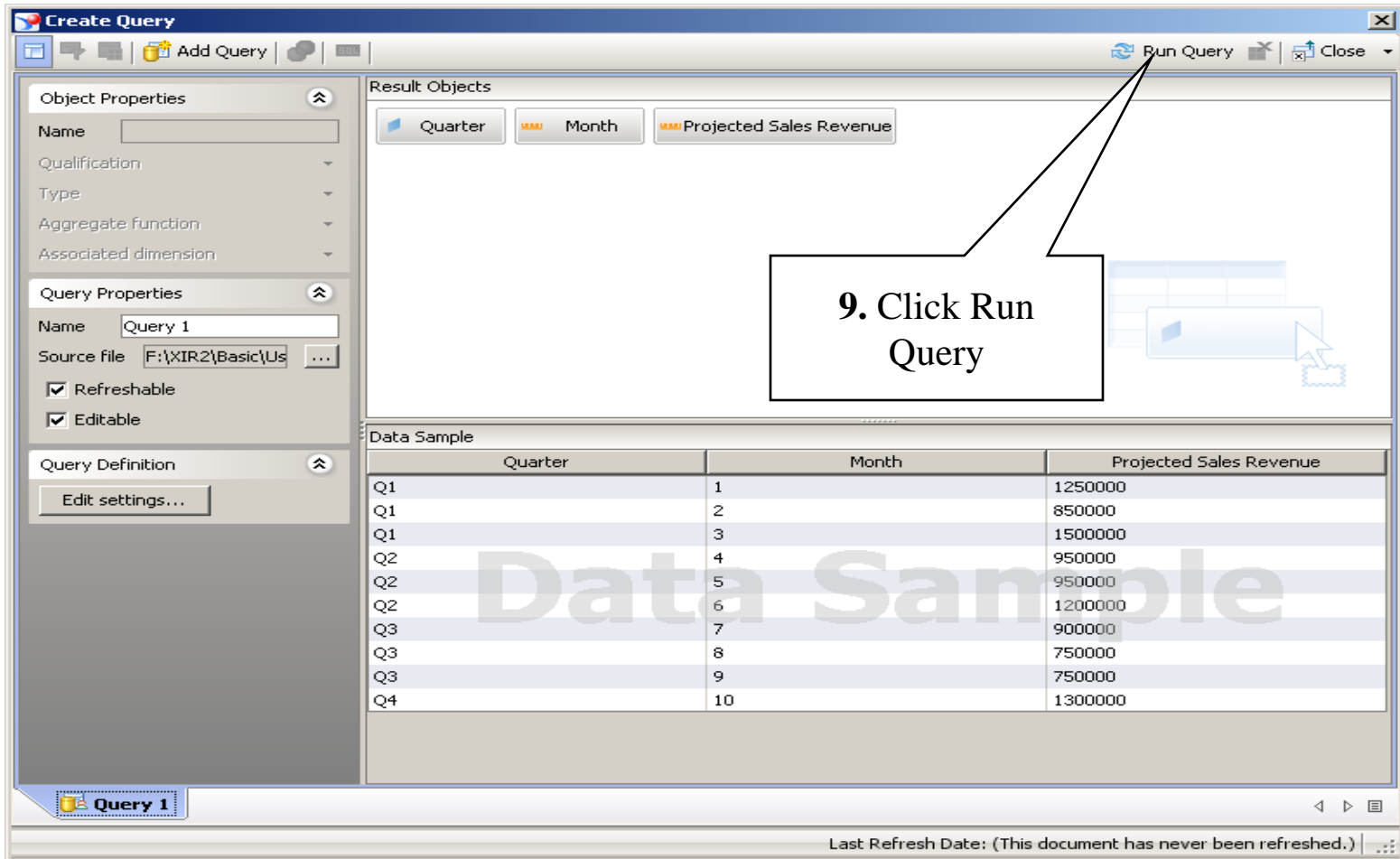
5. Click Open



Creating New Documents: From Other Data Sources

The screenshot shows the 'PDP' dialog box titled 'Select a data source'. The 'Excel' tab is selected. The 'File' section has a 'Name' field with the path 'F:\XIR2\Basic\Userdocs\EFASHION...' and a 'Browse' button. The 'Worksheet/Workbook File' section has a 'Sheet Name' dropdown menu set to 'Efashion'. The 'Field Selection' section has three radio buttons: 'All Fields' (selected), 'Range Definition: For example "A1:B5"', and 'Range Name: Efashion'. A checkbox 'First row contains column names' is checked. At the bottom are 'Next >>', 'Cancel', and 'Help' buttons. Three callout boxes provide instructions: '6. Select All Fields' points to the 'All Fields' radio button; '7. Check for 1st Row Contains Column Names' points to the checked checkbox; and '8. Click Next' points to the 'Next >>' button.

Creating New Documents: From Other Data Sources



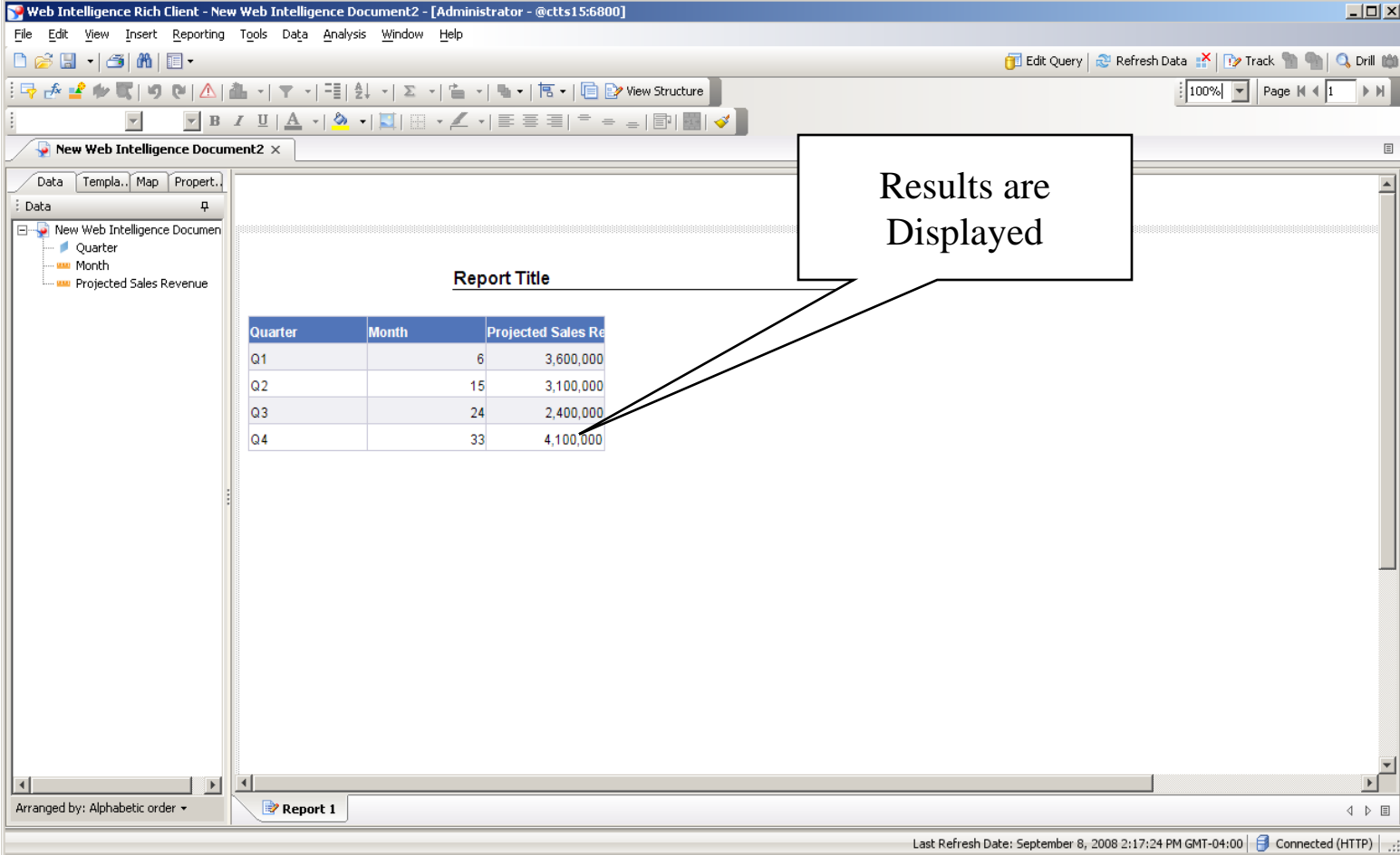
9. Click Run Query

Quarter	Month	Projected Sales Revenue
Q1	1	1250000
Q1	2	850000
Q1	3	1500000
Q2	4	950000
Q2	5	950000
Q2	6	1200000
Q3	7	900000
Q3	8	750000
Q3	9	750000
Q4	10	1300000

Data Sample

Last Refresh Date: (This document has never been refreshed.)

Creating New Documents: From Other Data Sources



The screenshot displays the Web Intelligence Rich Client interface. The main window shows a report titled "Report Title" with a table of data. A callout box with the text "Results are Displayed" points to the table. The table has the following data:

Quarter	Month	Projected Sales Re
Q1	6	3,600,000
Q2	15	3,100,000
Q3	24	2,400,000
Q4	33	4,100,000

The interface also shows a left-hand pane with a tree view containing "New Web Intelligence Document2", "Quarter", "Month", and "Projected Sales Revenue". The status bar at the bottom indicates "Last Refresh Date: September 8, 2008 2:17:24 PM GMT-04:00" and "Connected (HTTP)".



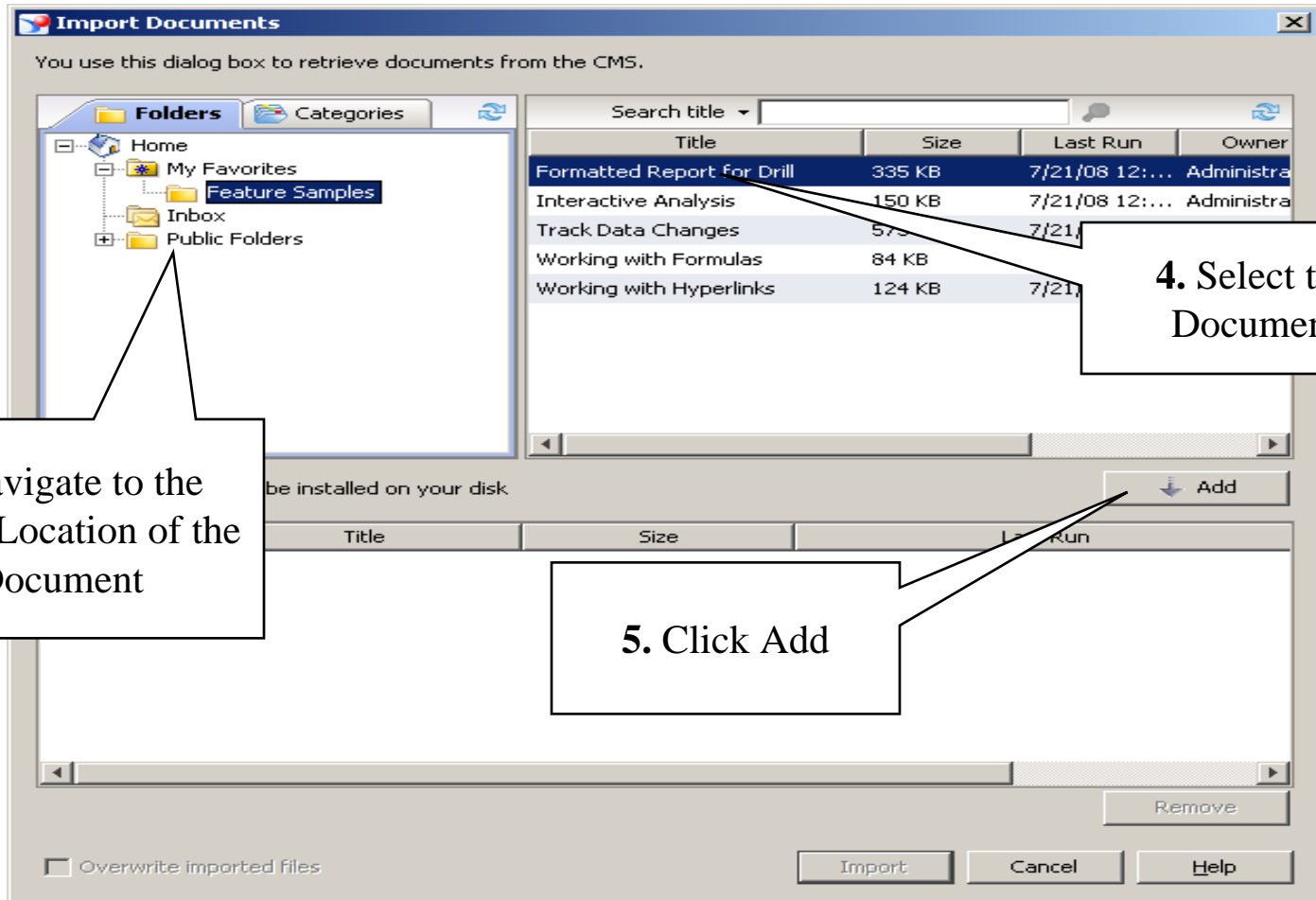
Importing Documents: To the Repository

A screenshot of the Web Intelligence Rich Client interface. The window title is "Web Intelligence Rich Client - [Administrator - @ctts15:6800]". The menu bar includes "File", "Edit", "View", "Insert", "Reporting", "Tools", "Data", "Analysis", "Window", and "Help". The main area shows a "Browse for documents to import ..." dialog box. A callout box labeled "1. Mouse-over Import Folder to Import a Document to the Repository" points to the "Import a document from the repository" folder icon in the left sidebar. Another callout box labeled "2. Click Folder to Browse for Documents" points to the "Browse for documents to import ..." text in the dialog. The dialog also features an "Import Document" button and a "Close" button. The Business Objects logo is visible in the bottom right of the dialog. The status bar at the bottom right shows "Connected (HTTP)".

1. Mouse-over Import Folder to Import a Document to the Repository

2. Click Folder to Browse for Documents

Importing Documents: To the Repository



Importing Documents: To the Repository

You use this dialog box to retrieve documents from the CMS.

Folders | **Categories**

- Home
 - My Favorites
 - Feature Samples
 - Inbox
 - Public Folders

Search title

Title	Size	Last Run	Owner
Formatted Report for Drill	335 KB	7/21/08 12:...	Administra
Interactive Analysis	150 KB	7/21/08 12:...	Administra
Track Data Changes	575 KB	7/21/08 12:...	Administra
Working with Formulas	84 KB	7/21/08 12:...	Administra
Working with Hyperlinks	124 KB	7/21/08 12:...	Administra

Files listed below will be installed on your disk.

Status	Title	Size	Last Run
	Formatted Report for Drill	335 KB	4/22/24 8:40:00 AM

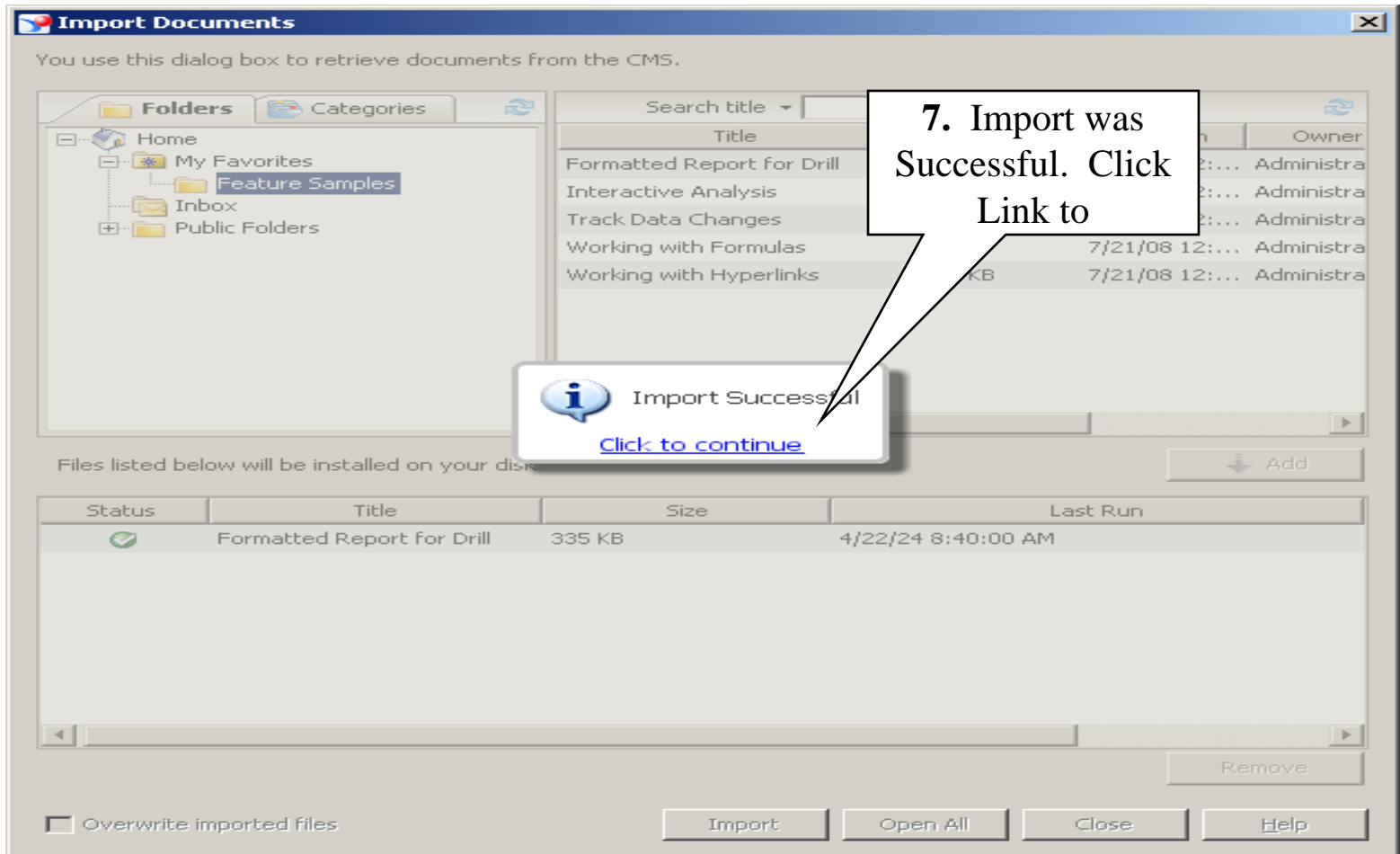
6. Click Import

Click Remove if you Need to Remove Documents from the Import.

Selected Report is Displayed Below. Multiple Documents Can be Imported Together.

Buttons: Import, Cancel, Help, Remove

Importing Documents: To the Repository



Importing Documents: To the Repository

You use this dialog box to retrieve documents from the CMS.

Check Mark Indicates the Document has Been Imported.

	Size	Last Run	Owner
Drill	335 KB	7/21/08 12:...	Administra
	150 KB	7/21/08 12:...	Administra
	575 KB	7/21/08 12:...	Administra
	84 KB	7/21/08 12:...	Administra
	124 KB	7/21/08 12:...	Administra

Files listed below will be installed on your disk.

Status	Title	Size	La
✓	Formatted Report for Drill	335 KB	4/22/24 8:40:00 AM

8. Click Close

Overwrite imported files

Import Open All Close Help

Using an Imported Document

The screenshot shows the Web Intelligence Rich Client interface. A dialog box is open, displaying a document browser. The dialog box has a title bar that reads "Web Intelligence Rich Client - [Administrator - @ctts15:6800]". The menu bar includes "File", "Edit", "View", "Insert", "Reporting", "Tools", "Data", "Analysis", "Window", and "Help". The main area of the dialog box shows a list of folders on the left and a central pane with the text "No recent documents" and a link "Browse for more documents ...". A callout box with a white background and black border points to this link, containing the text "1. Mouse-Over Open Folder and Click Folder to Browse for Documents". To the right of the central pane is a panel with a blue header "Open Document" and the text "Open a recent document or browse your disk". At the bottom of the dialog box is a "Close" button and the Business Objects logo. The status bar at the bottom right of the window shows "Connected (HTTP)".

Using an Imported Document

1. Select WID as Document Type

2. Select Document

3. Click Open

The screenshot shows the 'Open a document' dialog box with the following details:

- Look in: userDocs
- File list: Formatted Report for Drill.wid
- File name: Formatted Report for Drill.wid
- Files of type: Web Intelligence document
- Buttons: Open, Cancel

Using an Imported Document

The screenshot displays the WebIntelligence Rich Client interface. The main report area is titled "Overall State & City Sales" and contains a table and a 3D pie chart. The table lists sales revenue for various states and cities, with a total of 15,059,142. The pie chart shows the distribution of sales revenue by city, with a legend on the right. A callout box points to the table with the text "WID Document Displayed".

State	City	Sales revenue
New York	New York	3,151,021.70
Texas	Houston	2,246,198.40
California	Los Angeles	1,656,675.70
California	San Francisco	1,336,003.30
Texas	Austin	1,135,479.10
Illinois	Chicago	1,134,085.40
DC	Washington	1,053,581.40
Massachusetts	Boston	887,169.20
Colorado	Colorado Springs	843,584.20
Florida	Miami	811,923.60
Texas	Dallas	803,420.80
		15,059,142

**WID Document
Displayed**



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WebIntelligence™ 3.1 Intro To InfoView (1 Day)

WebIntelligence™ 3.1 Basic Reporting (1 Day)

WebIntelligence™ 3.1 Intermediate Reporting (1 Day)

WebIntelligence™ 3.1 Advanced Reporting (1 Day)

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