



Enterprise Reporting Introduction to Web Intelligence

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

Overview

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

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

SAP Business Objects Web Intelligence Product Tutorials

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

Web Intelligence vs. Standard Reports

Standard Reports

- Pre-defined reports
- Report scheduling and viewing application

Web Intelligence

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

ER Hours of Operation

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

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

Getting Support

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

Web Intelligence Access

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

This guide only includes information for access within the SGN.

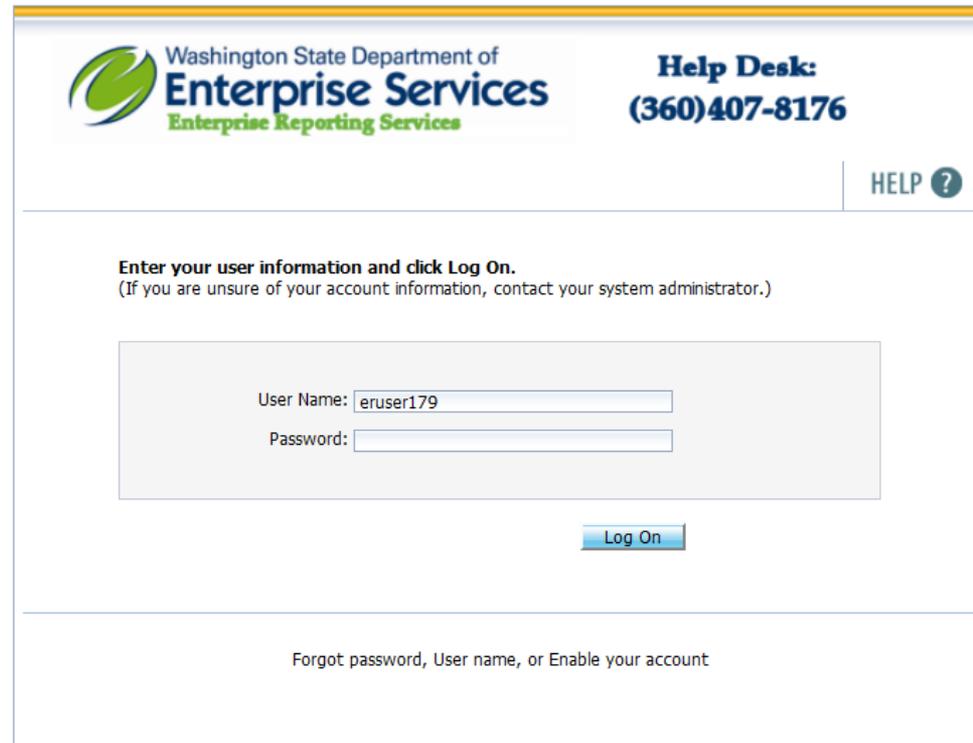
For access using SAW please consult the instructions at:

<http://des.wa.gov/SiteCollectionDocuments/ITSolutions/Enterprise%20Reporting/WEBI%20SAW%20Instructions.pdf>

Access through SGN

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

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



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

Password Requirements

The hardened password criteria is as follows:

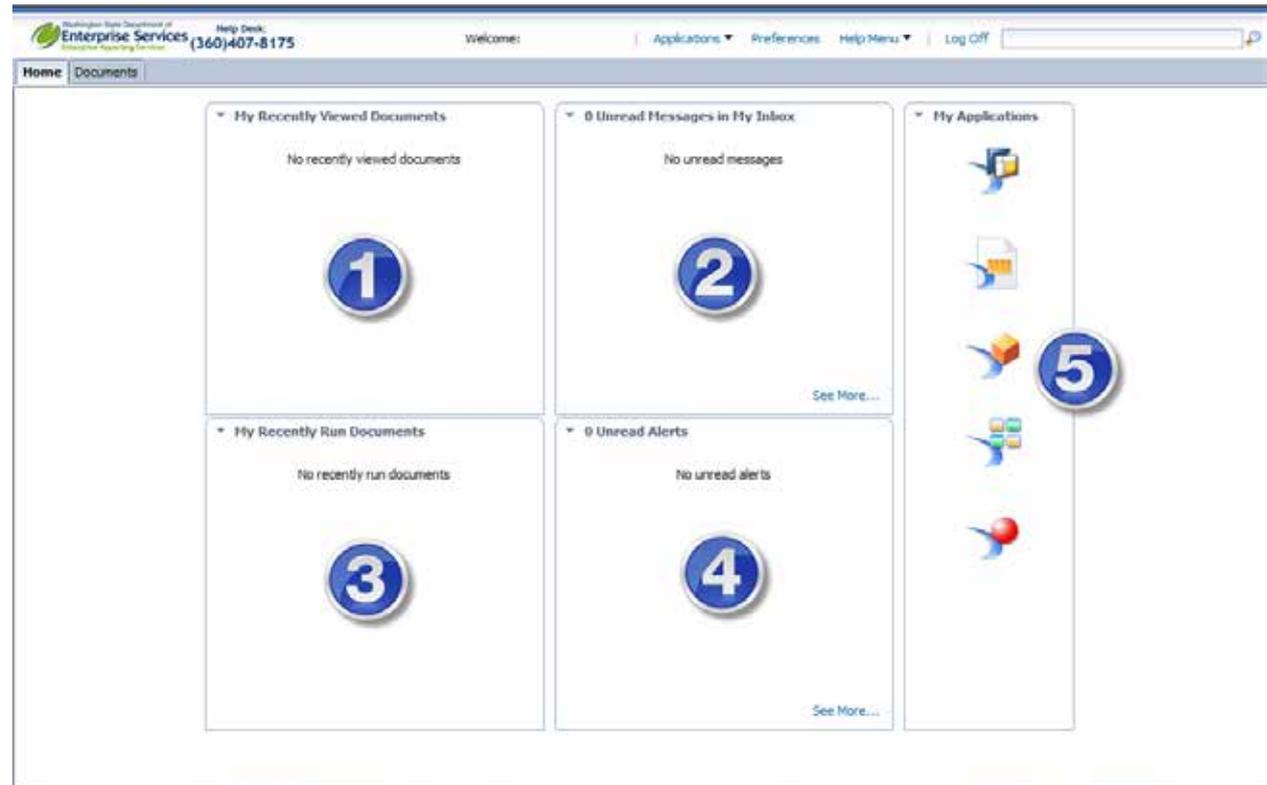
- Password must be at least eight characters long.
- Password must contain at least two of the following character classes: upper case letters, lower case letters, numerals, and special characters. It cannot contain your logon ID.
- Password must be changed every 120 days.
- After five incorrect logon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

BI Launch Pad Navigation

BI Launch Pad Navigation

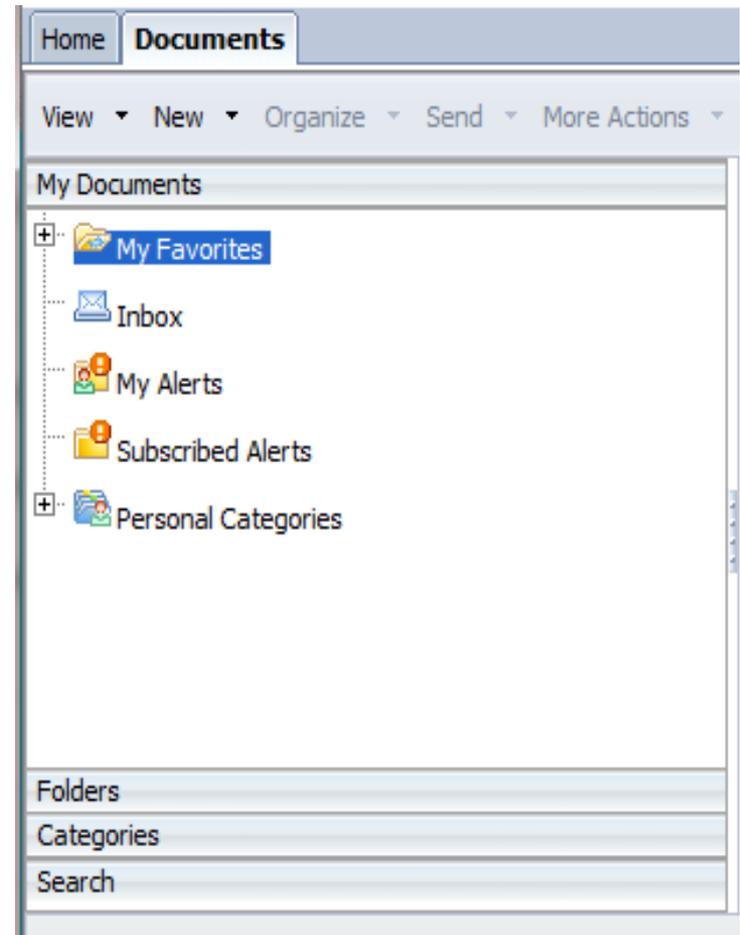
The “Home” tab allows for quick access to:

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



The “Documents” tab allows access to

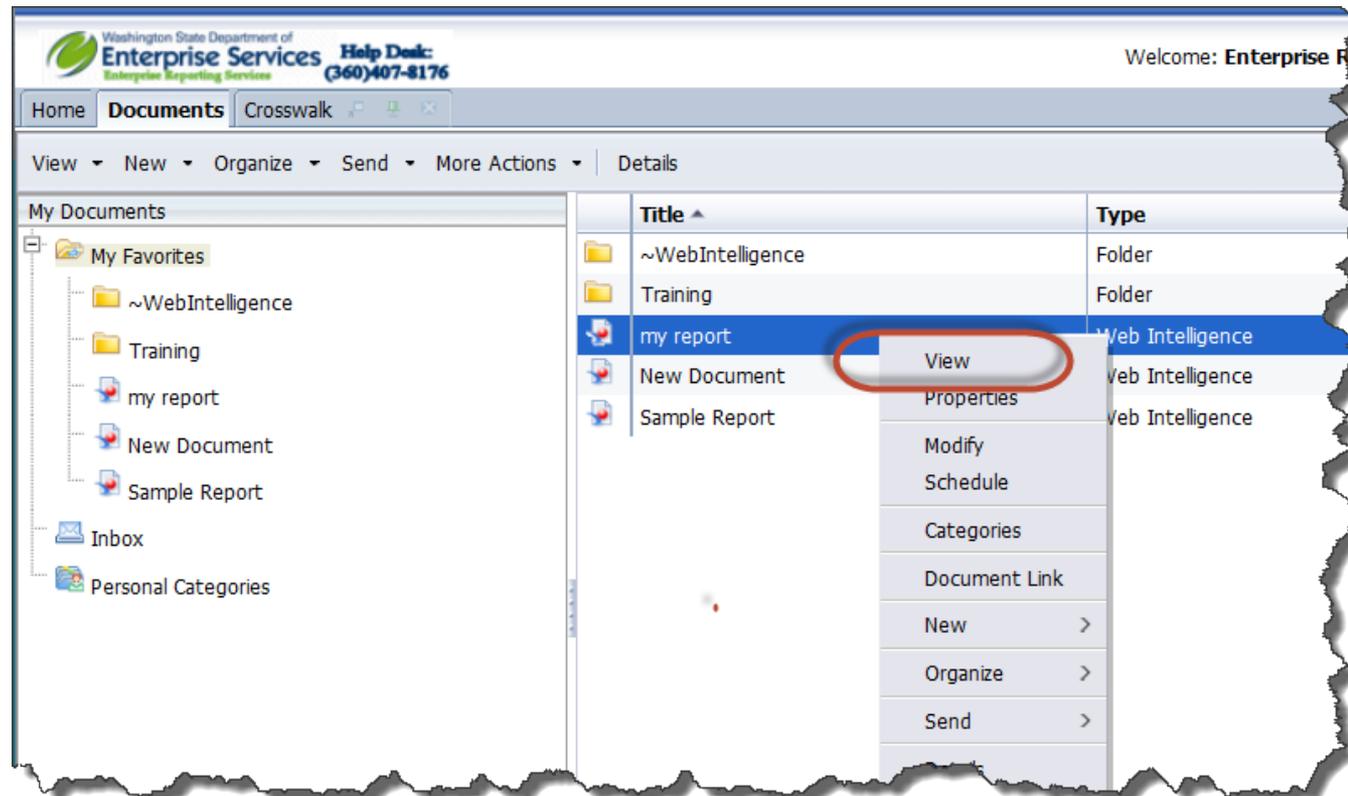
- My Documents – Access to personal documents. Other users will not have access to these documents.
- Folders – Access to Agency and other public folders.
- Personal Categories – Allows users to group reports that are used frequently together regardless of their folder.
- Search – Allow users to search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



Viewing Existing Documents

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

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



Viewing Existing Documents

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

The screenshot displays the Enterprise Reporting interface. At the top, there is a header with the Washington State Department of Enterprise Services logo, a help desk number (360)407-8176, and a welcome message for Enterprise Reporting. Below the header is a navigation bar with tabs for Home, Documents, Crosswalk, and New Document. A toolbar contains various icons for file operations and navigation. The main content area shows a report titled 'Report 1' with a table of data. The table has four columns: Fiscal Year, Fiscal Month, Program, and Amount. The data is as follows:

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

At the bottom of the interface, there is a status bar showing 'Report 1', 'Track Changes: Off', 'Page 1 of 1', '100%', and '2 minutes ago'.

Creating New Web Intelligence Documents

Creating New Web Intelligence Documents

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

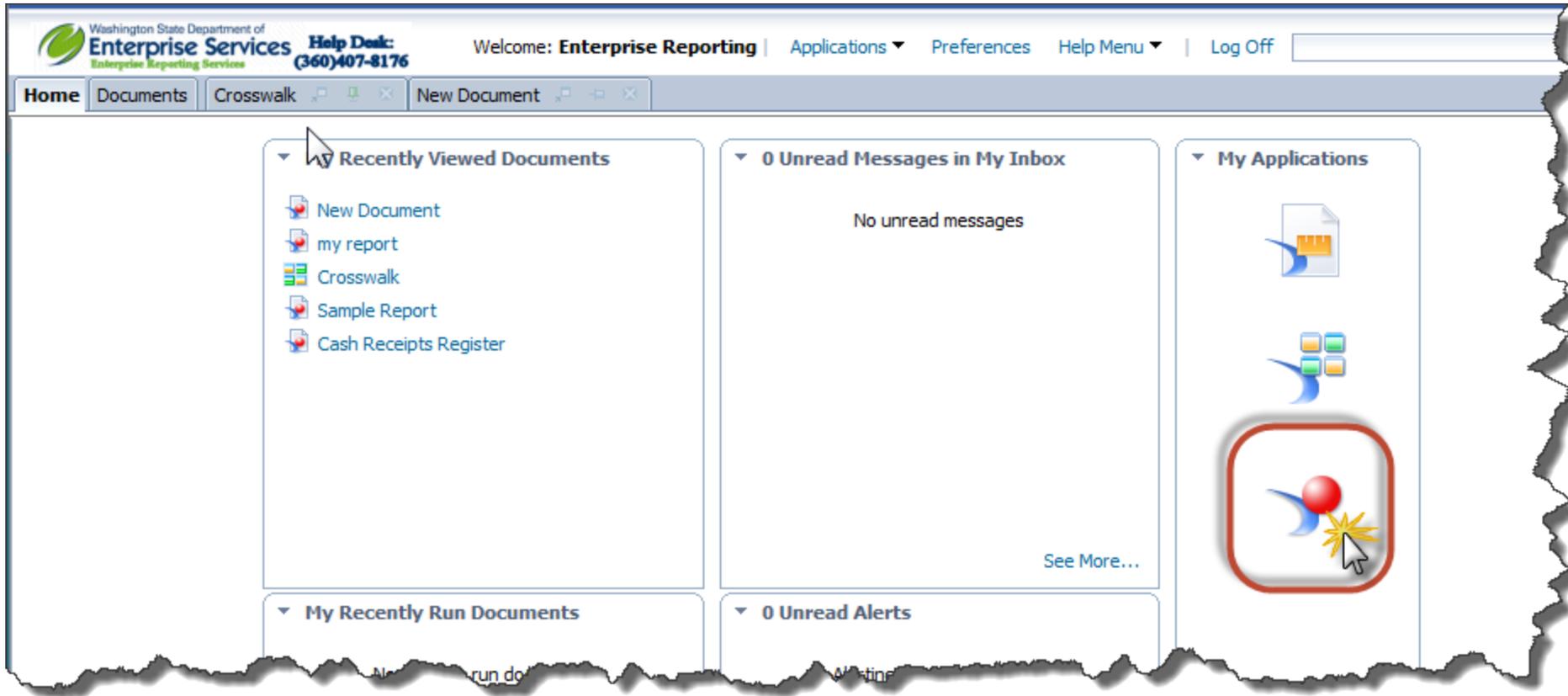
The document can be very simple or very complex, depending on the user's business need at the time.

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

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

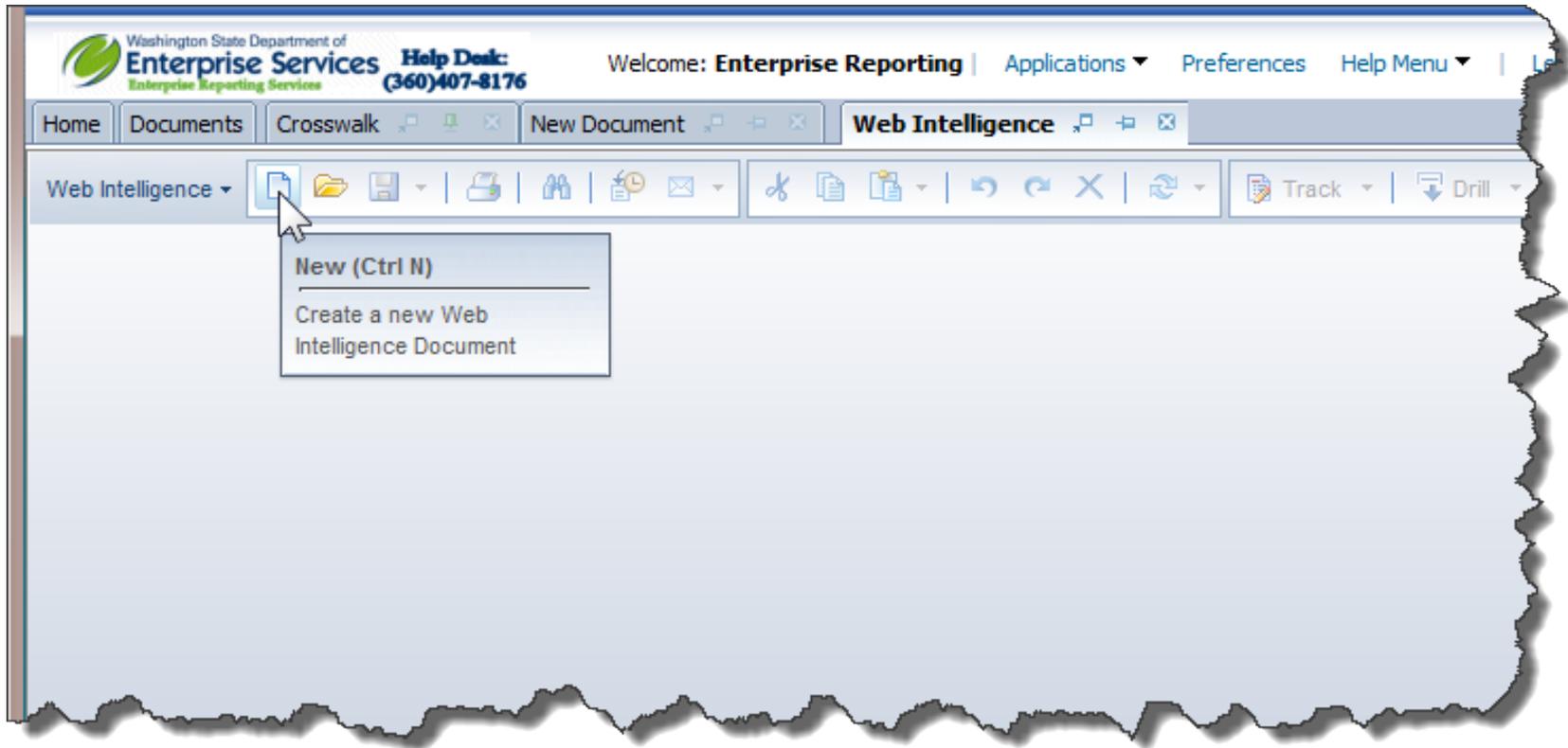
Creating New Web Intelligence Document

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



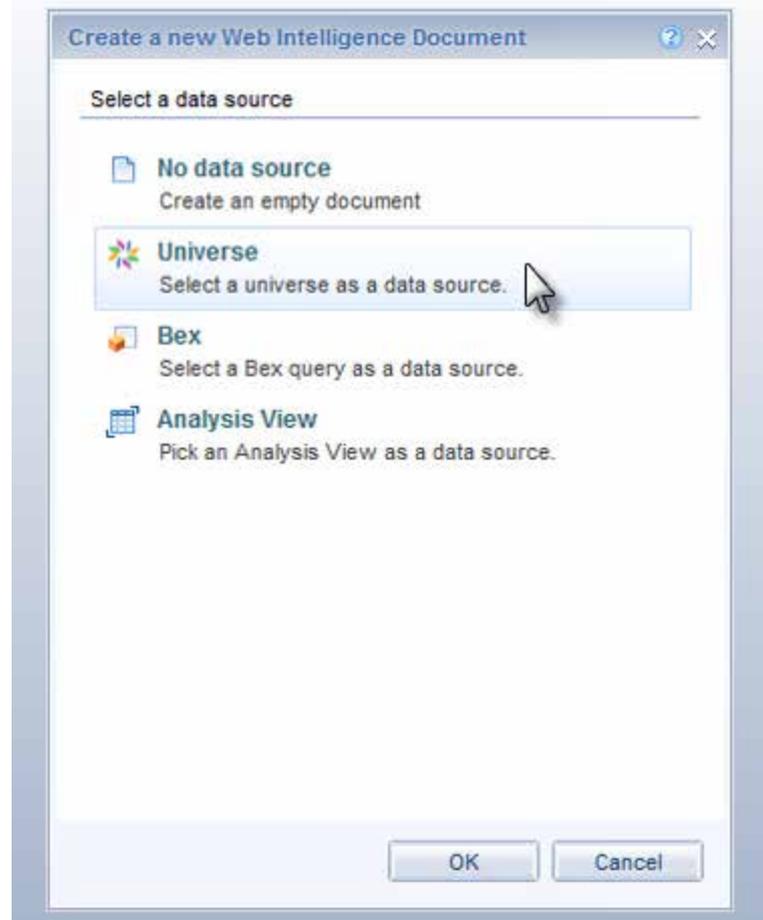
Creating New Web Intelligence Document

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



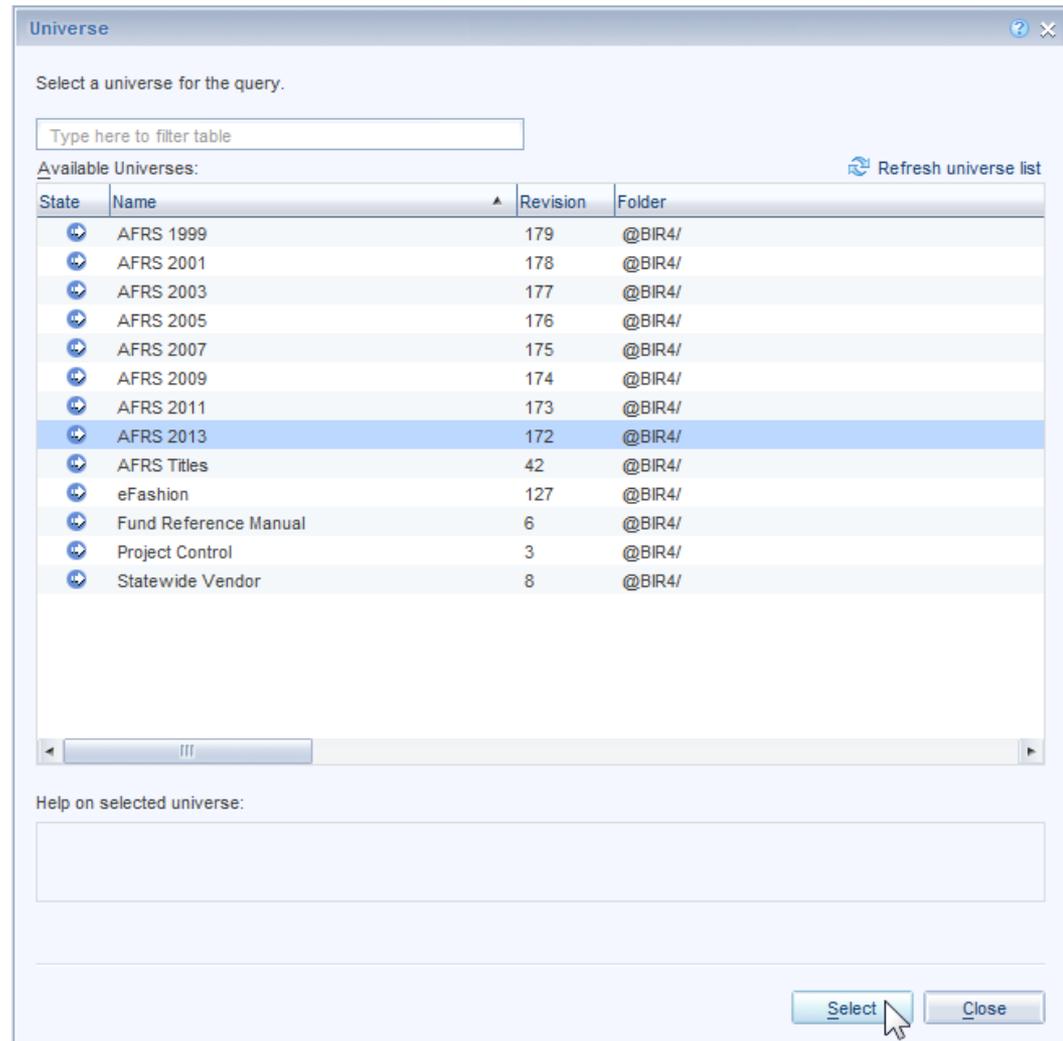
Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

A universe contains the following structures:

Classes

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

Objects

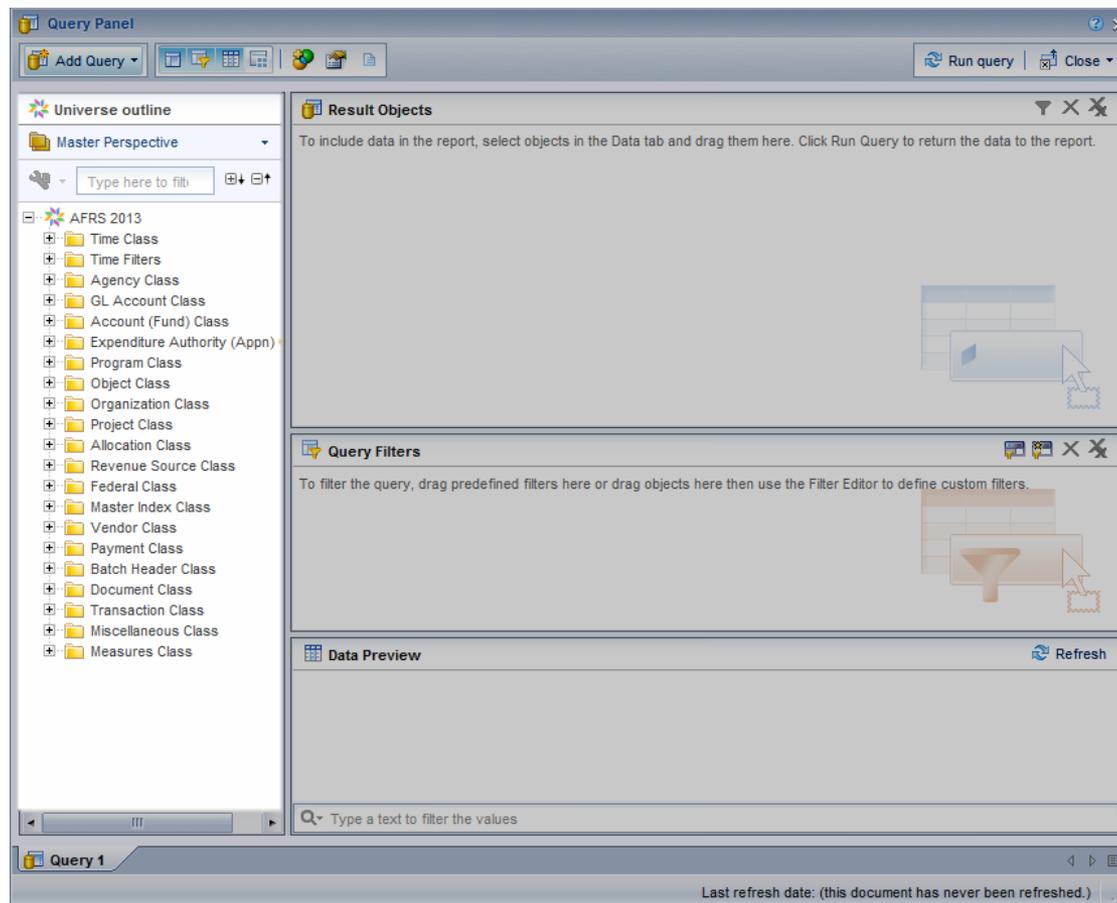
An object is a named component that maps to data or a derivation of data in the database.

Types of objects

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

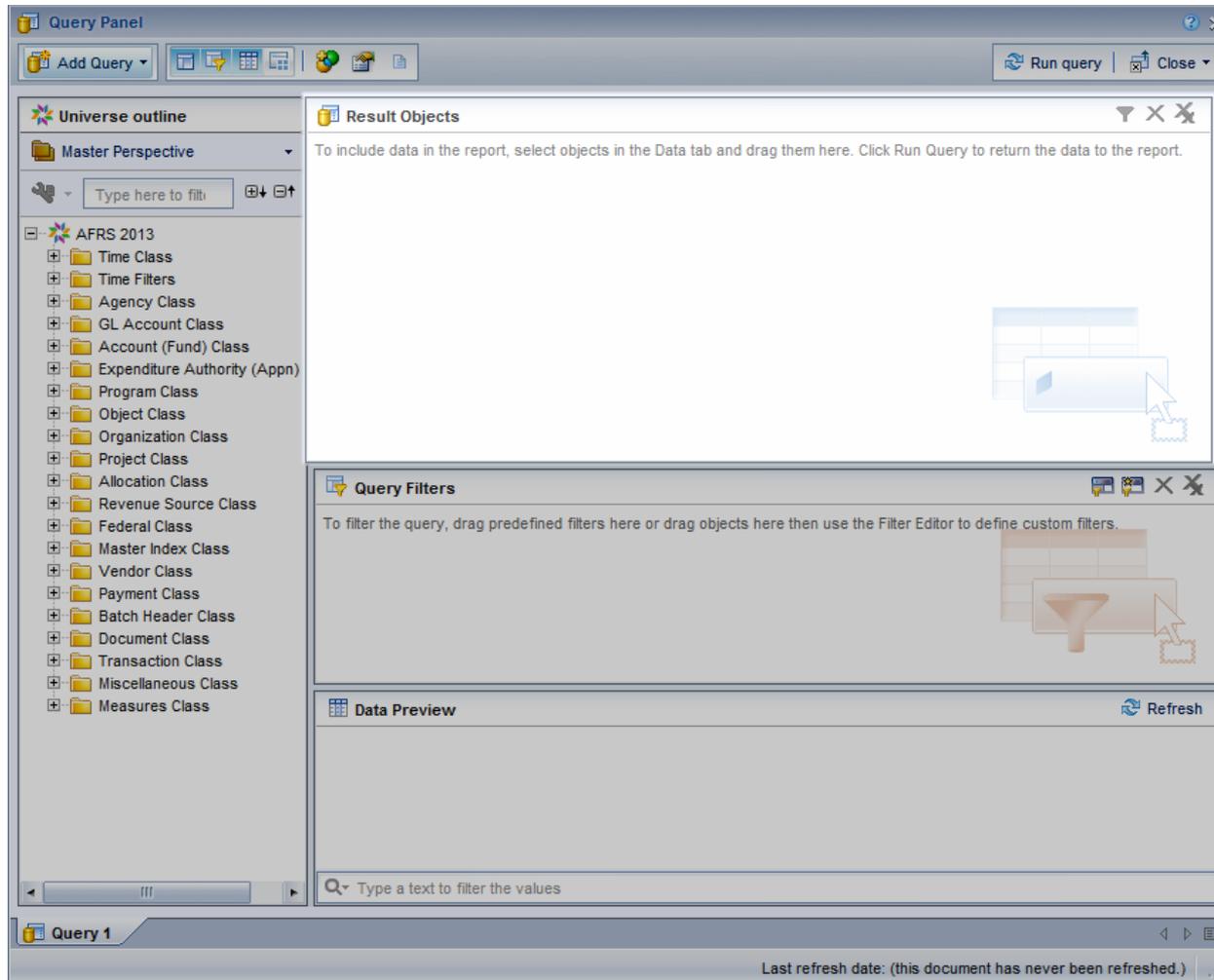
Creating New Web Intelligence Document

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



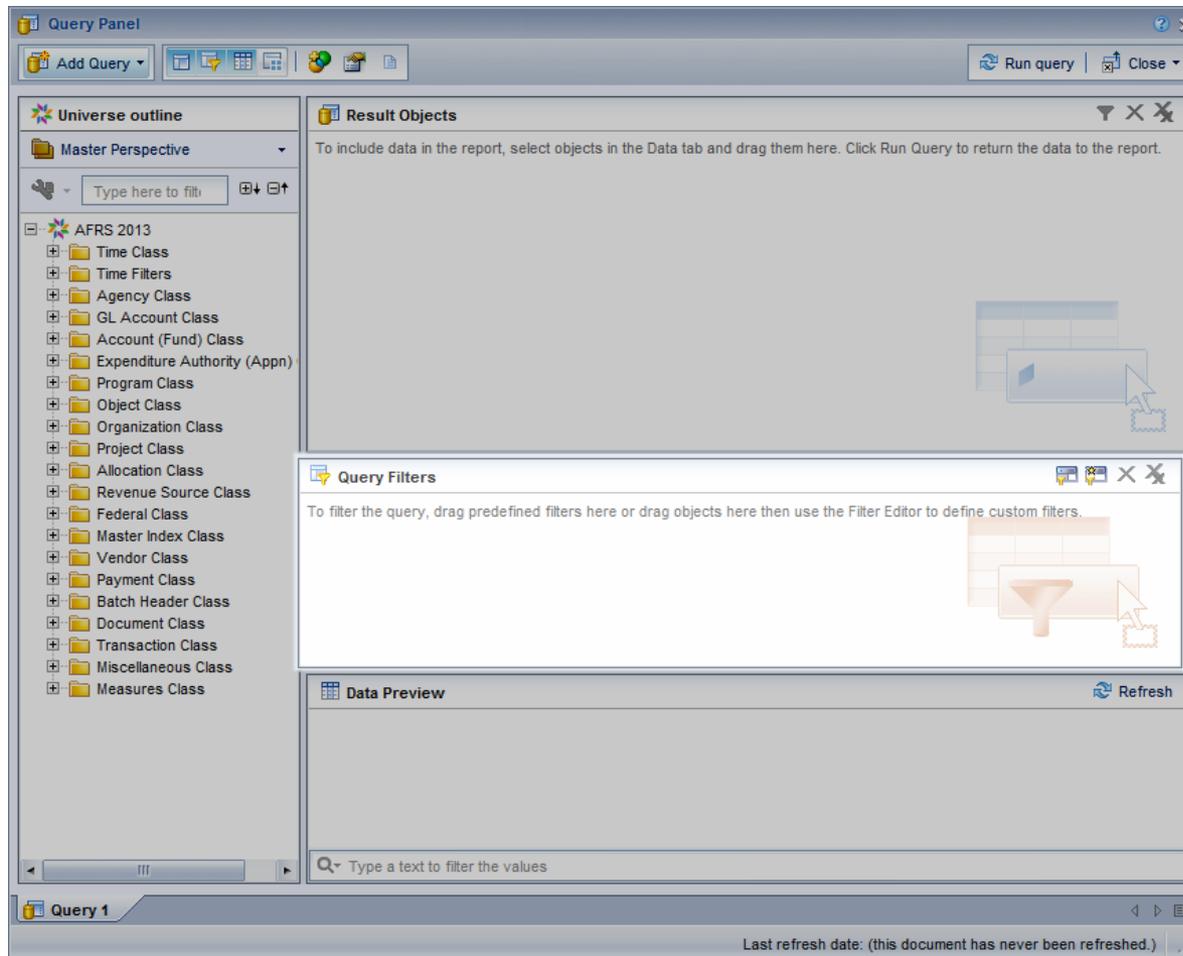
Creating New Web Intelligence Document

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



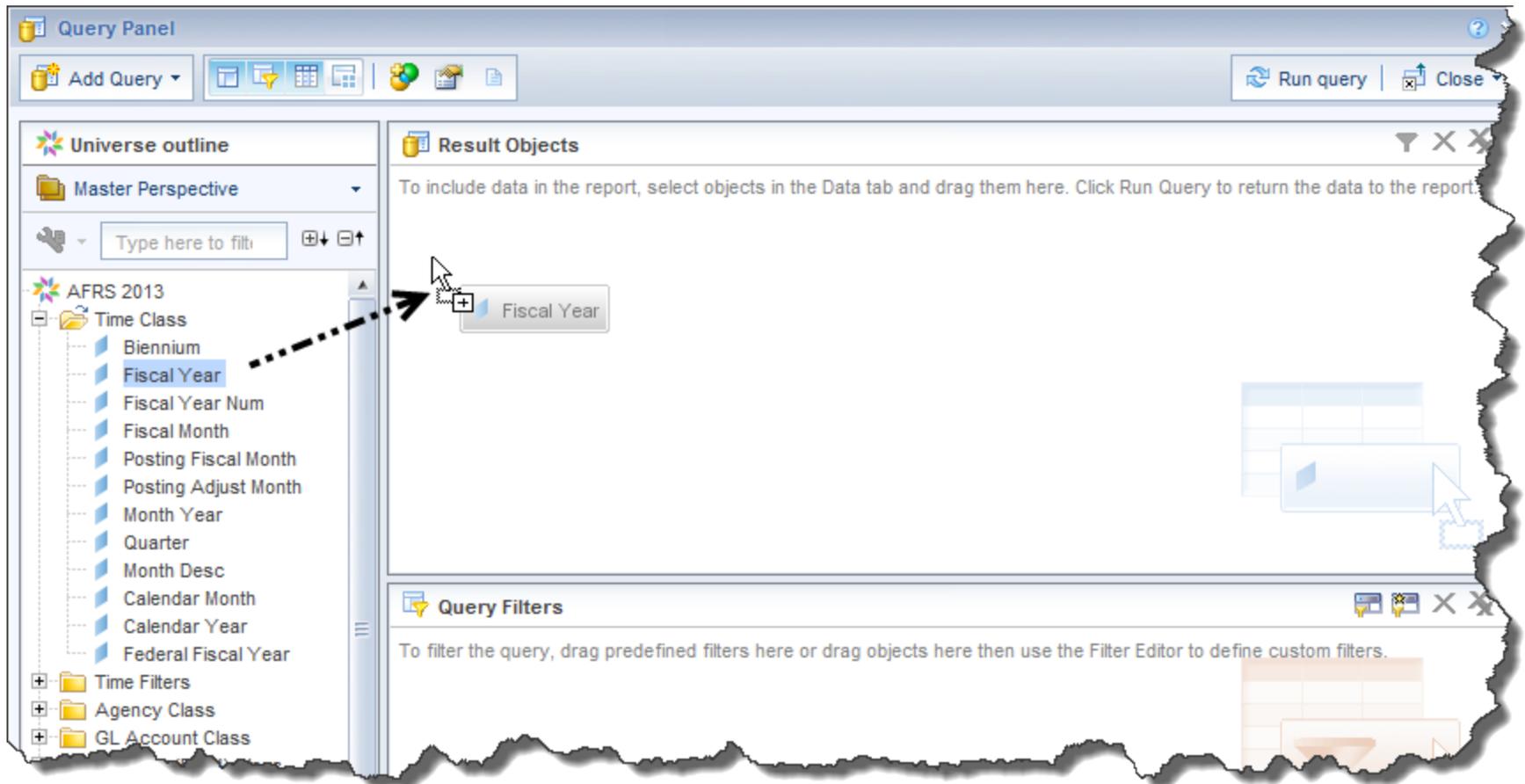
Creating New Web Intelligence Document

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



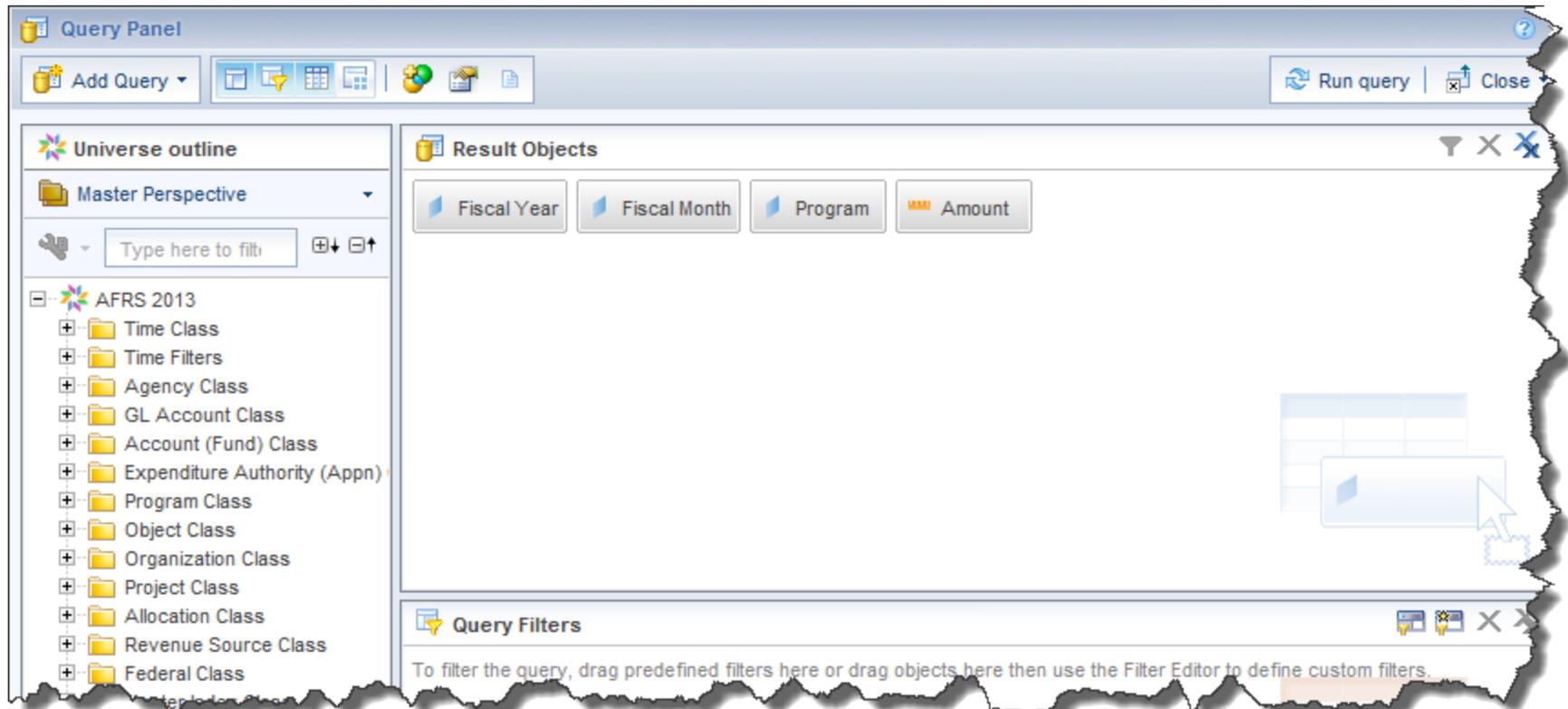
Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

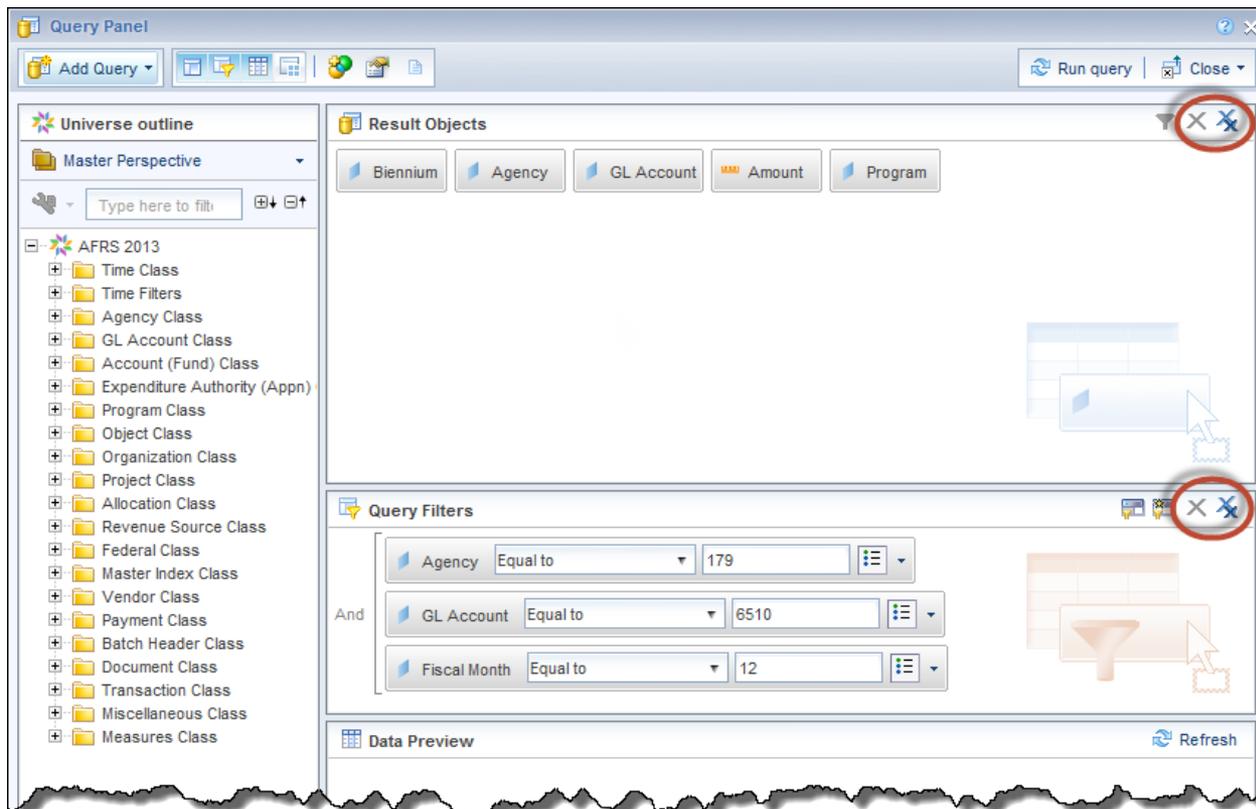
Repeat the previous step until the query contains all the objects you want to include.



Creating New Web Intelligence Document

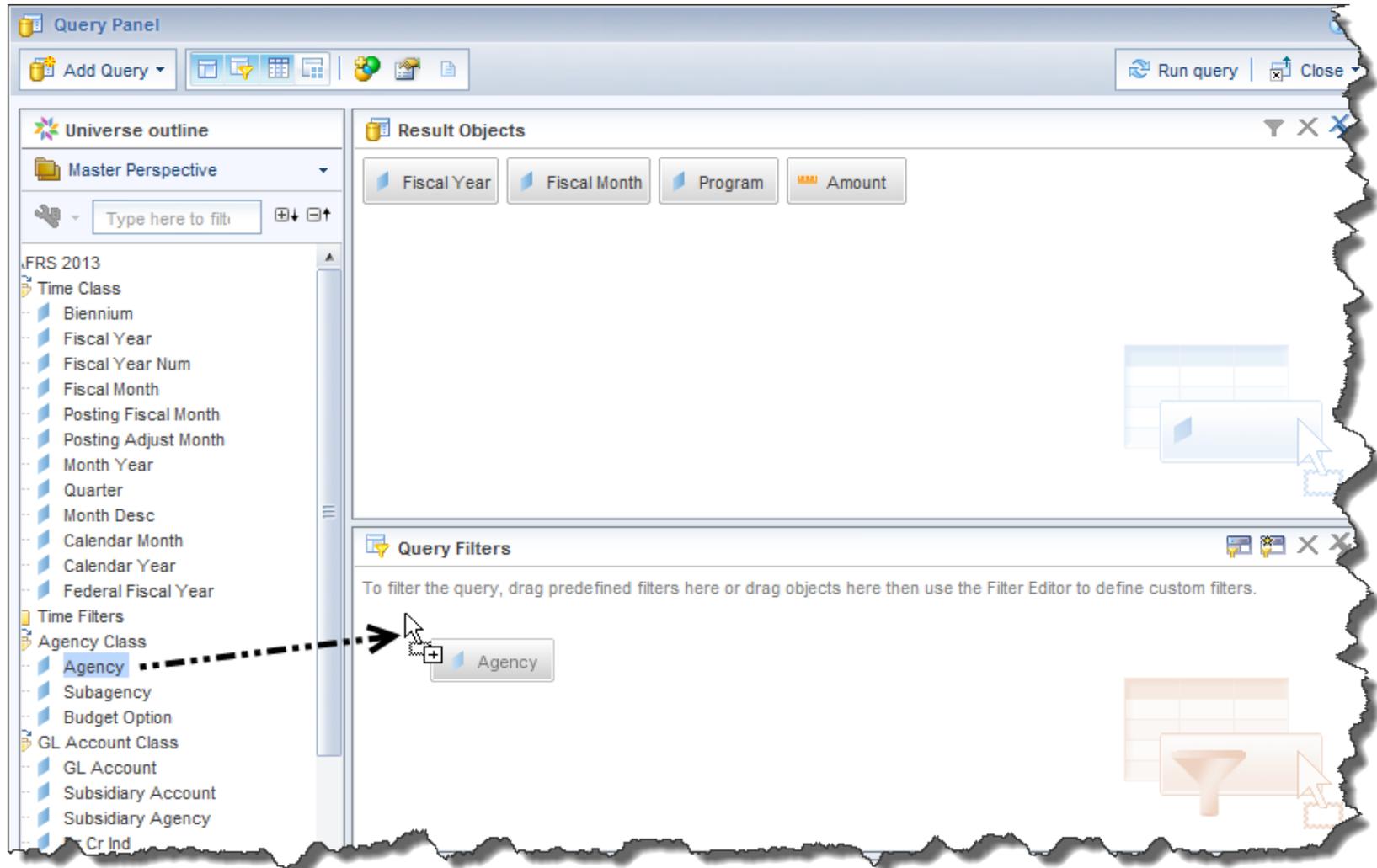
To remove an object from the **Result Objects** or **Query Filters** panes, click **Remove** at the top right corner of the pane.

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



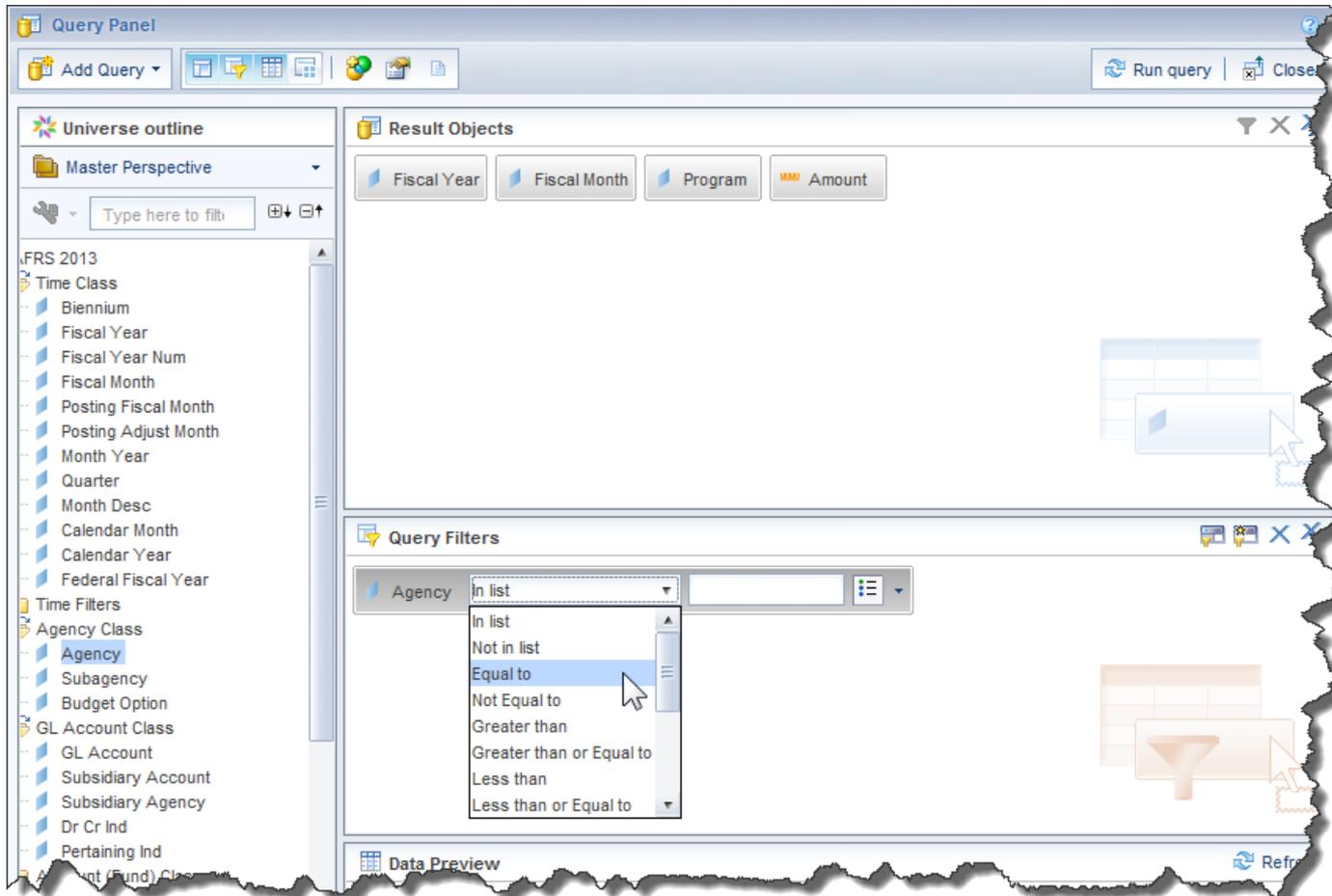
Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

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



Creating New Web Intelligence Document

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

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

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

Creating New Web Intelligence Document

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

The screenshot displays the SAP Query Panel interface. The title bar reads "Query Panel". The top toolbar includes an "Add Query" dropdown, several icons, and a "Run query" button which is circled in red. To the right of the "Run query" button is a "Close" button. The main area is divided into several sections:

- Universe outline:** A tree view showing the "Master Perspective" and a list of classes under "AFRS 2013", including Time Class, Agency Class, GL Account Class, and others.
- Result Objects:** A section with buttons for "Biennium", "Agency", "GL Account", "Amount", and "Program".
- Query Filters:** A section with three filter rows. The first row is "Agency Equal to 179", the second is "GL Account Equal to 6510", and the third is "Fiscal Month Equal to 12".
- Data Preview:** A section at the bottom with a "Refresh" button.

Navigating the Report Panel

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

The screenshot shows a report viewer window titled "Report 1". The interface includes a menu bar (File, Properties), a ribbon with tabs (Report Element, Format, Data Access, Analysis, Page Setup), and a sub-ribbon with groups (Filters, Data Tracking, Display, Conditional, Interact, Function). The main area displays a table with columns "Rien" and "Program". The table contains data for the year 2013 across various program codes. Callouts point to the Undo button, the Refresh button, the "Display Data Elements" button, the Page Navigation controls, and the Zoom controls.

Rien	Program
2013	010
2013	020
2013	030
2013	040
2013	050
2013	060
2013	070
2013	080

Save a Web Intelligence Document

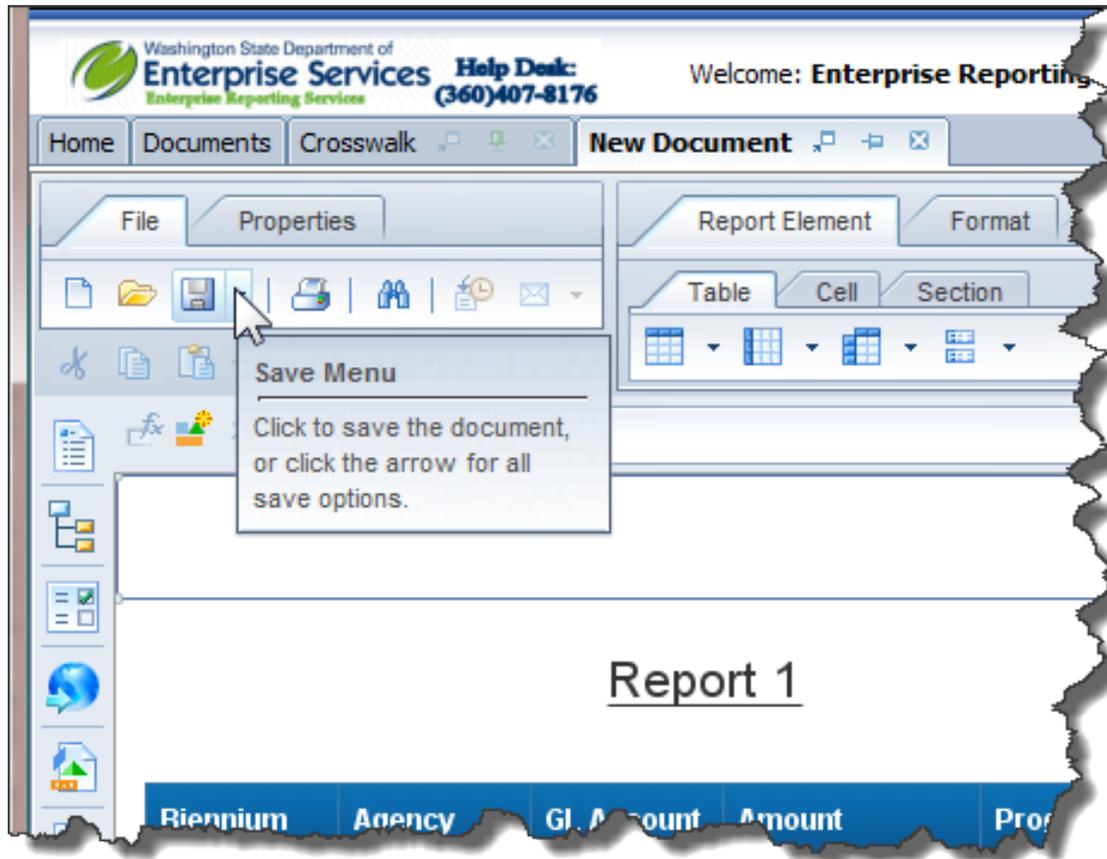
After the query is run, the results will be displayed in the **Report View** window.

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

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

Save a Web Intelligence Document

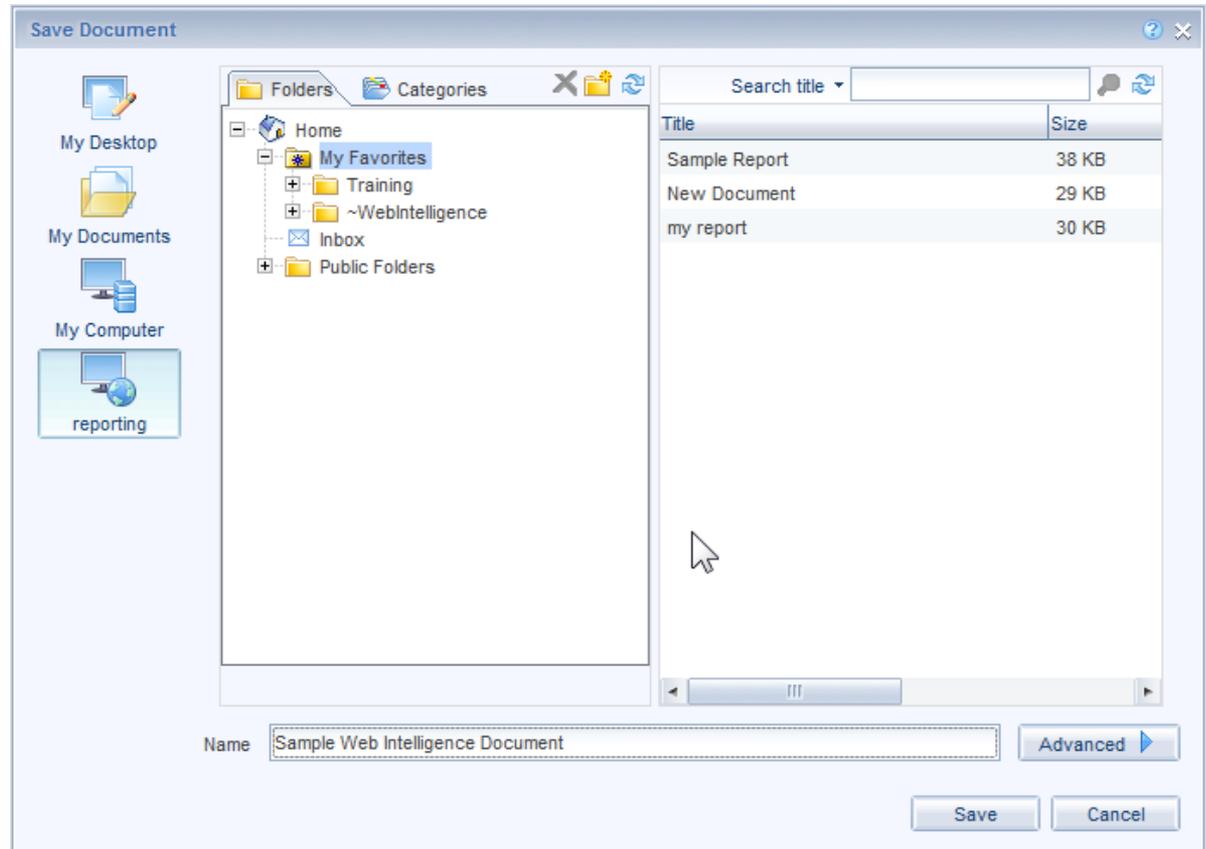
1. To save a Web Intelligence Document click the **Save** button on the upper left corner.



Save a Web Intelligence Document

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

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



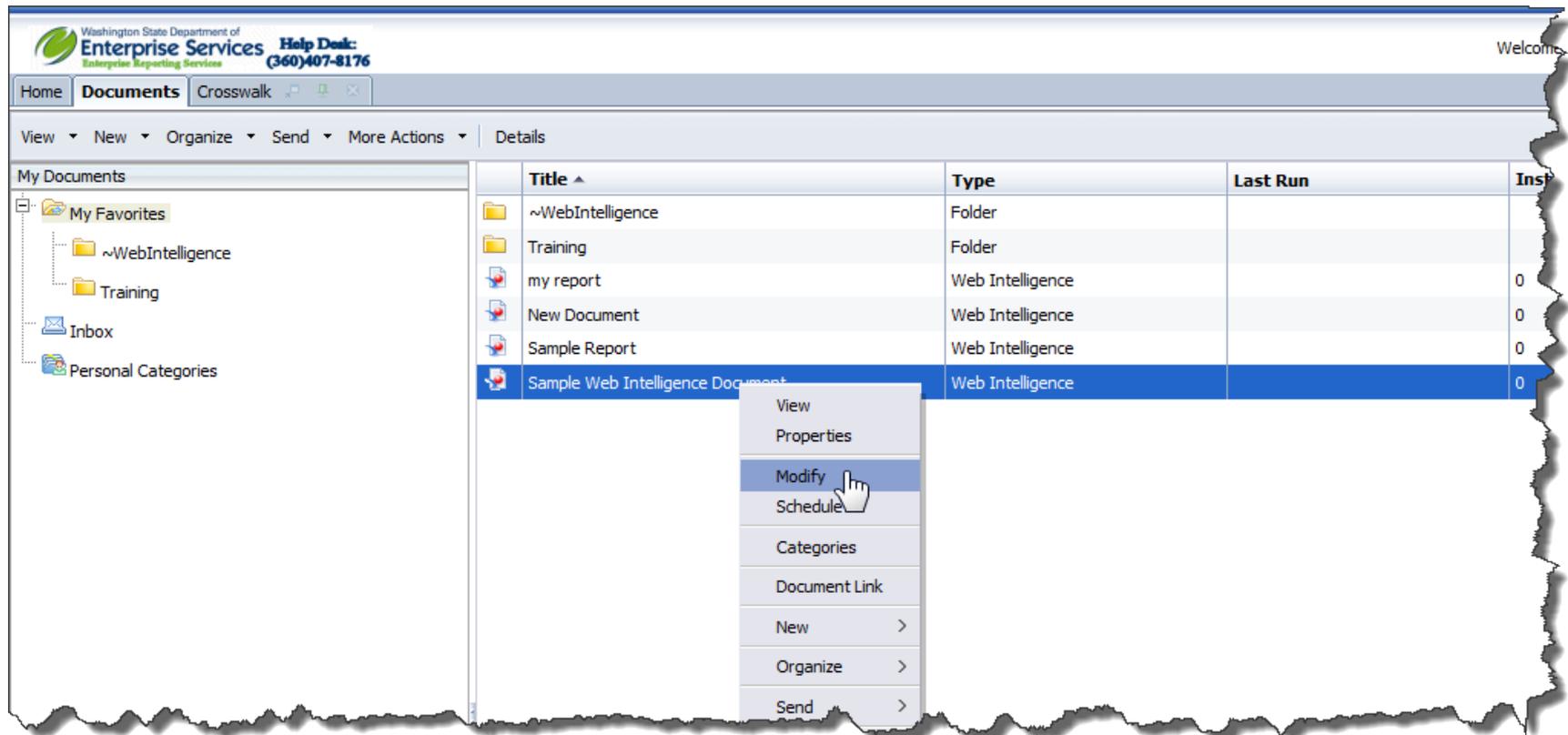
Query Filter Options

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

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

Modify a Document

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



Modify a Document

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

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

Home Documents Crosswalk Sample Web Intellig...

File Properties Report Element Format Data Access Analysis Page Setup

Data Providers Tools Data Objects

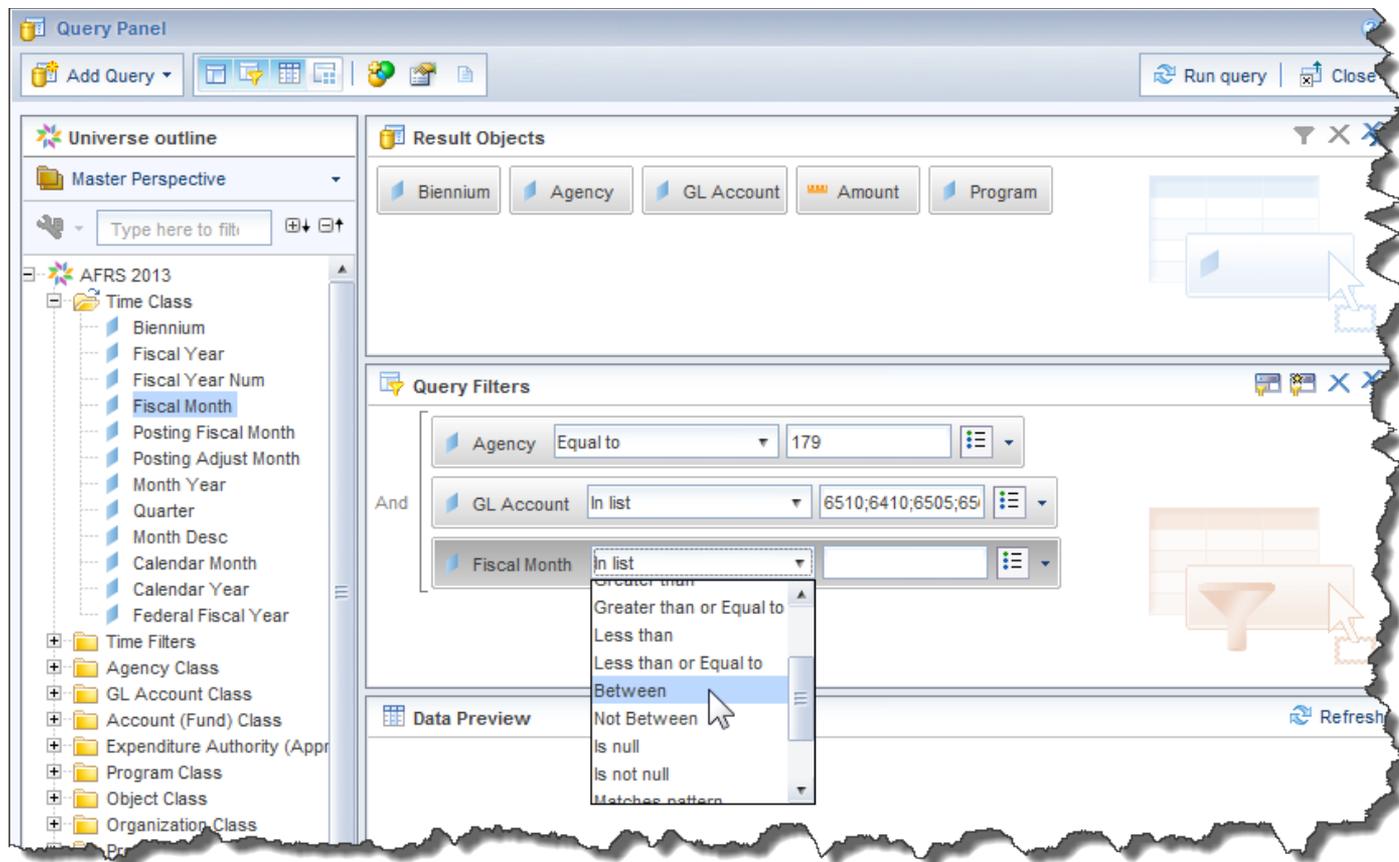
New data provider Edit Purge New Variable Merge

Edit (Ctrl+Shift D)
Edit data provider

Report 1

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

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



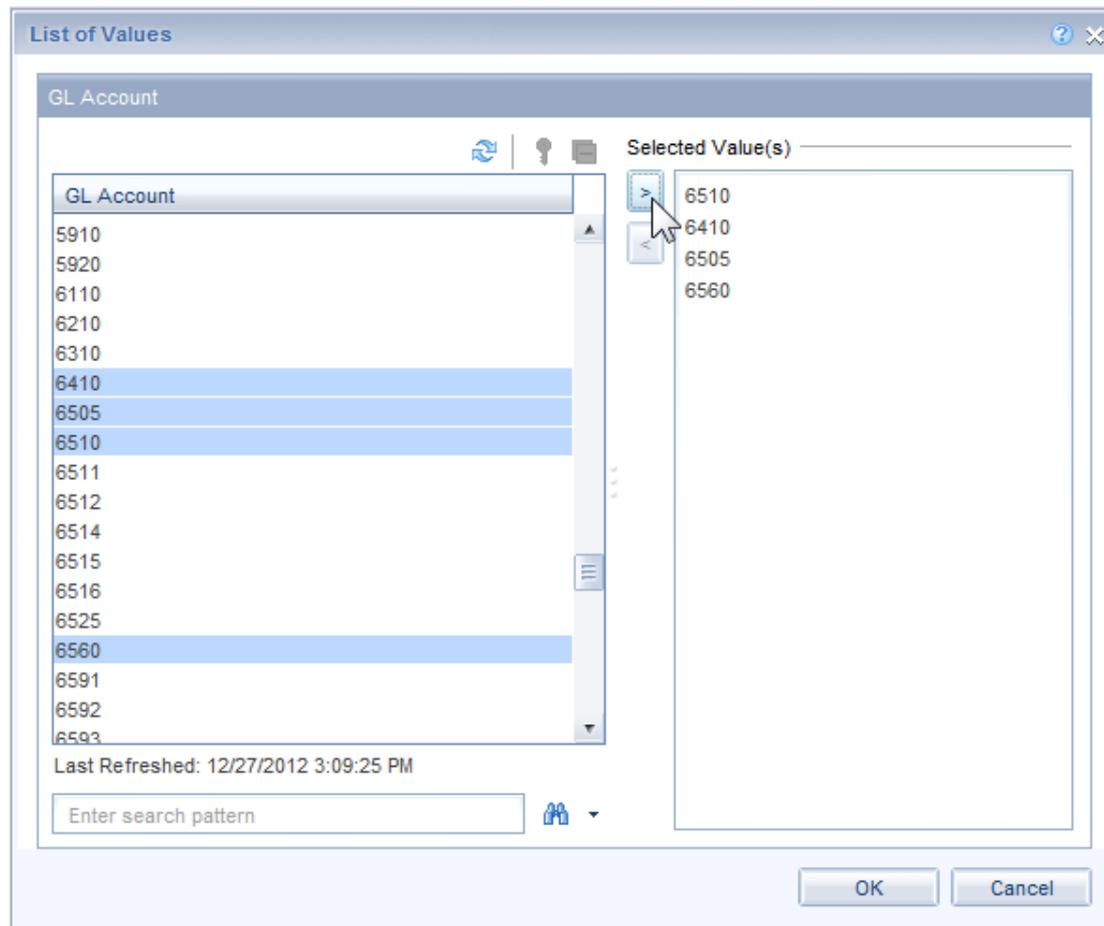
The filter editor box now displays two fields for entering values. Enter a value in each box. The 'Between' operator is inclusive and will include the values entered.

The screenshot displays a software interface titled "Query Panel". On the left, a "Universe outline" shows a tree structure for "AFRS 2013" with "Time Class" expanded to show fields like "Biennium", "Fiscal Year", and "Fiscal Month". The "Fiscal Month" field is selected. The main area is divided into "Result Objects" (listing Biennium, Agency, GL Account, Amount, Program) and "Query Filters". The "Query Filters" section contains three filter rules: "Agency Equal to 179", "GL Account In list 6510;6410;6505;65", and "Fiscal Month Between 01 And 12". The "Between" operator is highlighted in the third rule. The interface includes a toolbar with "Add Query", "Run query", and "Close" buttons.

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

The screenshot displays the 'Query Panel' interface. On the left is the 'Universe outline' showing a tree structure for 'AFRS 2013' with various class categories. The main area is divided into three sections: 'Result Objects' (containing Biennium, Agency, GL Account, Amount, and Program), 'Query Filters' (containing Agency and GL Account filters), and 'Data Preview'. The 'Query Filters' section shows the 'GL Account' filter set to 'In list' with the value '6510'. A dropdown menu is open for the 'GL Account' filter, listing options: 'Constant', 'Value(s) from list' (highlighted), 'Prompt', 'Object from this query', and 'Result from another query'. The 'Data Preview' section is currently empty.

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



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

The screenshot displays the 'Query Panel' interface. On the left, the 'Universe outline' shows a tree structure for 'AFRS 2013' with various class categories like 'Time Class', 'Agency Class', and 'GL Account Class'. The 'Result Objects' section at the top right lists 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. The 'Query Filters' section contains two filters: 'Agency' set to 'Equal to' with the value '179', and 'GL Account' set to 'In list' with the value '6510;6410;6505;6560'. The 'Data Preview' section at the bottom is currently empty. The status bar at the bottom right indicates the last refresh date as 'December 27, 2012 2:54:20 PM GMT-08:00'.

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

Matches Pattern

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

The screenshot displays a query builder interface with the following components:

- Query Panel:** Includes an 'Add Query' button and several utility icons.
- Universe outline:** A tree view on the left showing a hierarchy of dimensions. Under 'FRS 2013', 'Time Class' is expanded, and 'Fiscal Month' is selected.
- Result Objects:** A horizontal bar containing buttons for 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'. 'GL Account' is currently selected.
- Query Filters:** A central area with three filter rows:
 - Row 1: 'Agency' with operator 'Equal to' and value '179'.
 - Row 2: 'Fiscal Month' with operator 'Between' and values '01' and '12'.
 - Row 3: 'GL Account' with operator 'In list' and an empty value field.
- Operator Dropdown:** A menu is open for the 'GL Account' filter, listing operators: 'Between', 'Not Between', 'Is null', 'Is not null', 'Matches pattern' (highlighted), 'Different from pattern', 'Both', and 'Excent'.
- Data Preview:** A section at the bottom with a search bar labeled 'Type a text to filter the values'.

Matches Pattern

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

The screenshot displays a software interface titled "Query Panel". On the left, the "Universe outline" shows a tree structure under "FRS 2013" with "Fiscal Month" selected. The "Result Objects" section shows buttons for "Biennium", "Agency", "GL Account", "Amount", and "Program". The "Query Filters" section contains three filter rows: "Agency Equal to 179", "Fiscal Month Between 01 And 12", and "GL Account Matches pattern 65%". A mouse cursor is positioned over the "65%" value.

Working with Web Intelligence Reports

Add Columns

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

The screenshot shows the Enterprise Reporting interface. On the left, the 'Available Objects' pane lists 'Sample Web Intelligence Document' with sub-items: Agency, Biennium, GL Account, Program, Amount, and Variables. The main report area, titled 'Report 1', displays a table with the following data:

Biennium	Agency	Account	Amount
2013	179	6505	(\$124,301.12)
2013	179	6510	\$221,920,785.00
2013	179	6511	\$11,128,840.65
2013	179	6515	(\$22,341.03)
2013	179	6516	\$49,198,162.43
2013	179	6525	(\$28,428,537.21)
Sum:			253,672,608.72

A red circle highlights the 'Account' column header, and a mouse cursor is positioned over it, indicating the process of adding a new column.

To Remove a column –

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

The screenshot displays the Enterprise Reporting software interface. The 'Available Objects Window' on the left shows a tree structure under 'Sample Web Intelligence Document' with folders for Agency, Biennium, GL Account, Program, Amount, and Variables. A mouse cursor is hovering over the 'Program' folder, and a tooltip shows the formula `=NameOf([Program])`. The main report area, titled 'Report 1', shows a table with the following data:

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

Remove Columns

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

The screenshot shows the Enterprise Reporting interface. On the left is the 'Available Objects' tree with categories like Agency, Biennium, GL Account, Program, Amount, and Variables. The main area displays a table titled 'Report 1' with columns: Biennium, Agency, GL Account, Amount, and Program. A 'Remove' dialog box is open over the table, showing two options: 'Remove Row' (unselected) and 'Remove Column' (selected). The dialog has 'OK' and 'Cancel' buttons. The status bar at the bottom indicates 'Track Changes: Off', 'Page 1 of 1', '100%' zoom, and '7 minutes ago'.

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	(\$1,452,292.39)	010
2013	1		\$40,797.62	020
2013	1		\$716,030.27	030
2013	1		(\$514,631.35)	040
2013	1		\$1,579,070.88	050
2013	1		(\$28,826.50)	060
2013	1		\$33,118.87	070
2013	179	6505	\$239,935.65	080

Add / Remove Columns

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

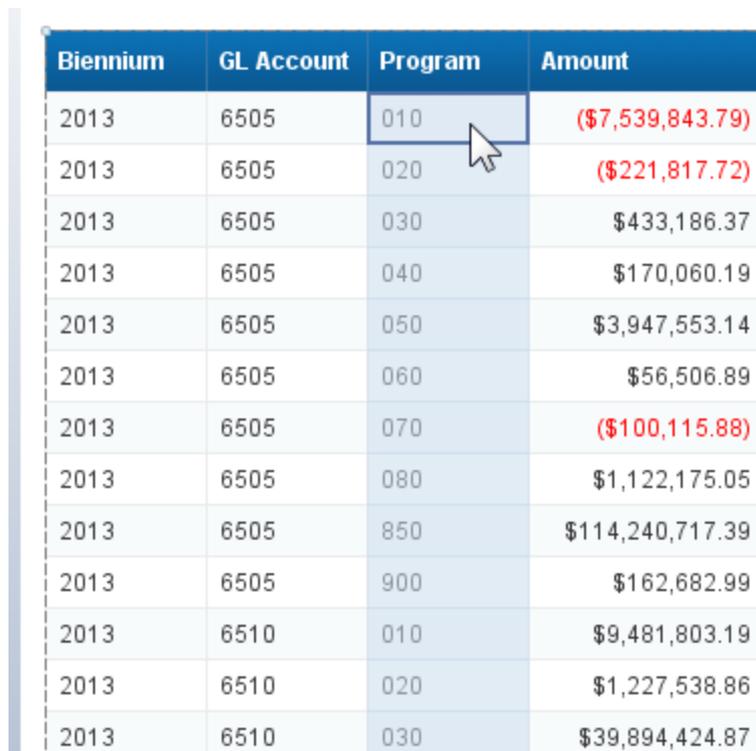
The screenshot displays the Enterprise Reporting software interface. The main window shows a report titled "Report 1" with a table of financial data. The table has five columns: Biennium, Agency, Program, GL Account, and Amount. The data is as follows:

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

The interface also shows a menu bar with options like File, Properties, Report Element, Format, Data Access, Analysis, Page Setup, Reading, Design, and Data. The 'Available Objects' pane on the left lists various data sources such as Agency, Biennium, GL Account, Program, Amount, and Variables. The status bar at the bottom indicates "Track Changes: Off", "Page 1 of 1", and "33 minutes ago".

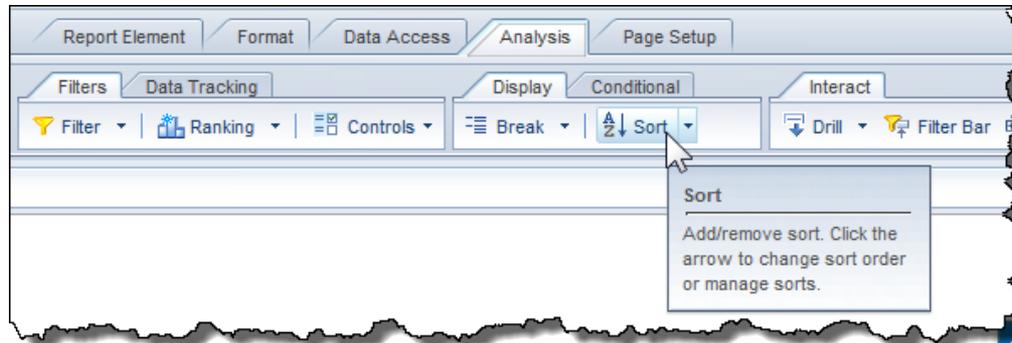
The default sort order for the table data is left to right. The primary sort is the left most column. To set your own sort order follow these steps.

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

A screenshot of a data table with four columns: Biennium, GL Account, Program, and Amount. The table contains 13 rows of data. A mouse cursor is hovering over the 'Program' column header. The 'Amount' column contains values with dollar signs and parentheses indicating negative values.

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

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



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

A break divides a large table into smaller sub-tables based on a selected dimension value. Using a break, you can display subtotals by the specified value, as well as a grand total for all values. The data is automatically sorted in ascending order by the dimension values when a break is inserted.

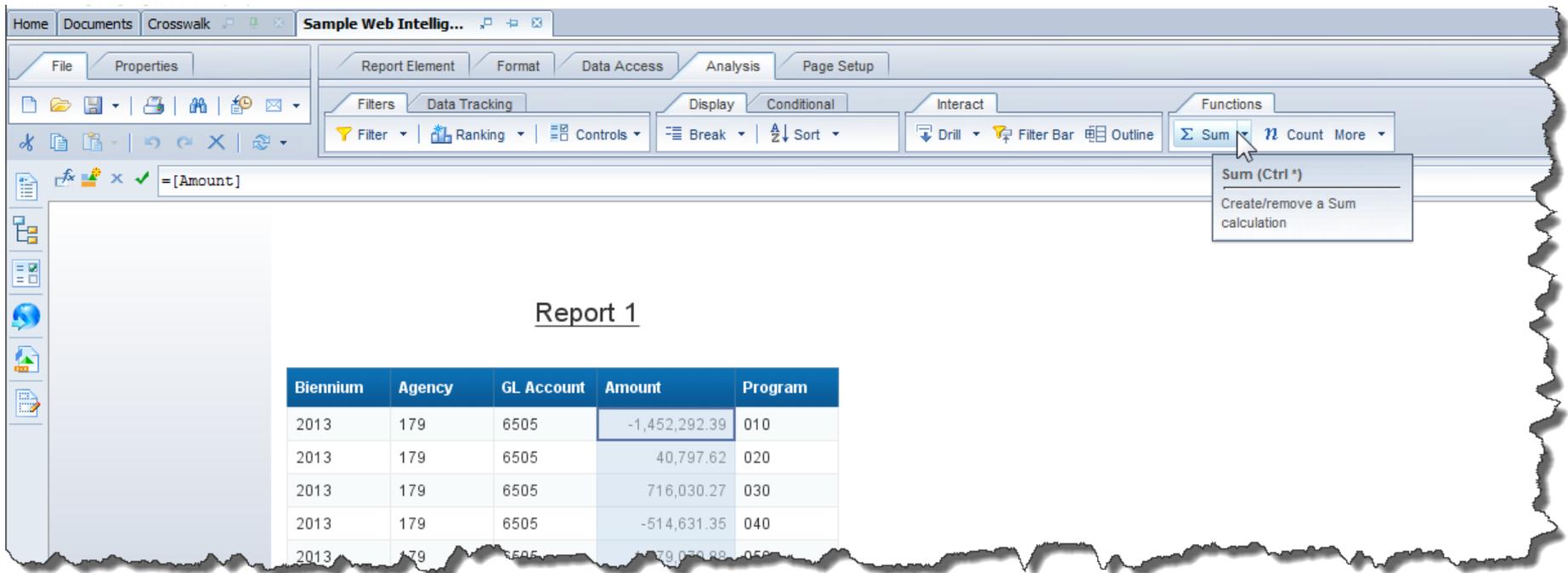
To add a break, click in the data to highlight the column. Click on the **Insert/Remove Break** button on the Reporting toolbar.

The screenshot shows the Enterprise Reporting software interface. The top navigation bar includes 'Home', 'Documents', and 'Crosswalk'. The main toolbar has tabs for 'Report Element', 'Format', 'Data Access', 'Analysis', 'Page Setup', 'Reading', and 'Design'. The 'Design' tab is active, and the 'Break' button is highlighted with a red box. A tooltip for the 'Break' button is visible, stating 'Add a break to group results on a table.' The interface also includes an 'Available Objects' pane on the left and a data table at the bottom right.

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

Simple Calculations – Sum

1. Highlight the data in the **Amount** column
2. Select the **Analysis** tab and click the **Sum** icon located on the **Functions** sub tab.
3. Navigate to the end of the report to see your total



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

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	-1,452,292.39	010
2013	179	6505	40,797.62	020
2013	179	6505	716,030.27	030
2013	179	6505	-514,631.35	040
2013	179	6505	79,079.88	050

The interface includes a menu bar with "File" and "Properties", and a ribbon with "Report Element", "Format", "Data Access", "Analysis", and "Page Setup". The "Analysis" ribbon is active, showing "Filters", "Data Tracking", "Display", "Conditional", "Interact", and "Functions" sub-tabs. The "Functions" sub-tab is selected, and the "Sum" button is highlighted. A tooltip for the "Sum" button reads: "Sum (Ctrl *)", "Create/remove a Sum calculation".

Format Numbers

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

The screenshot shows a software interface with a table and a dropdown menu. The table has the following data:

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

The dropdown menu shows the following options:

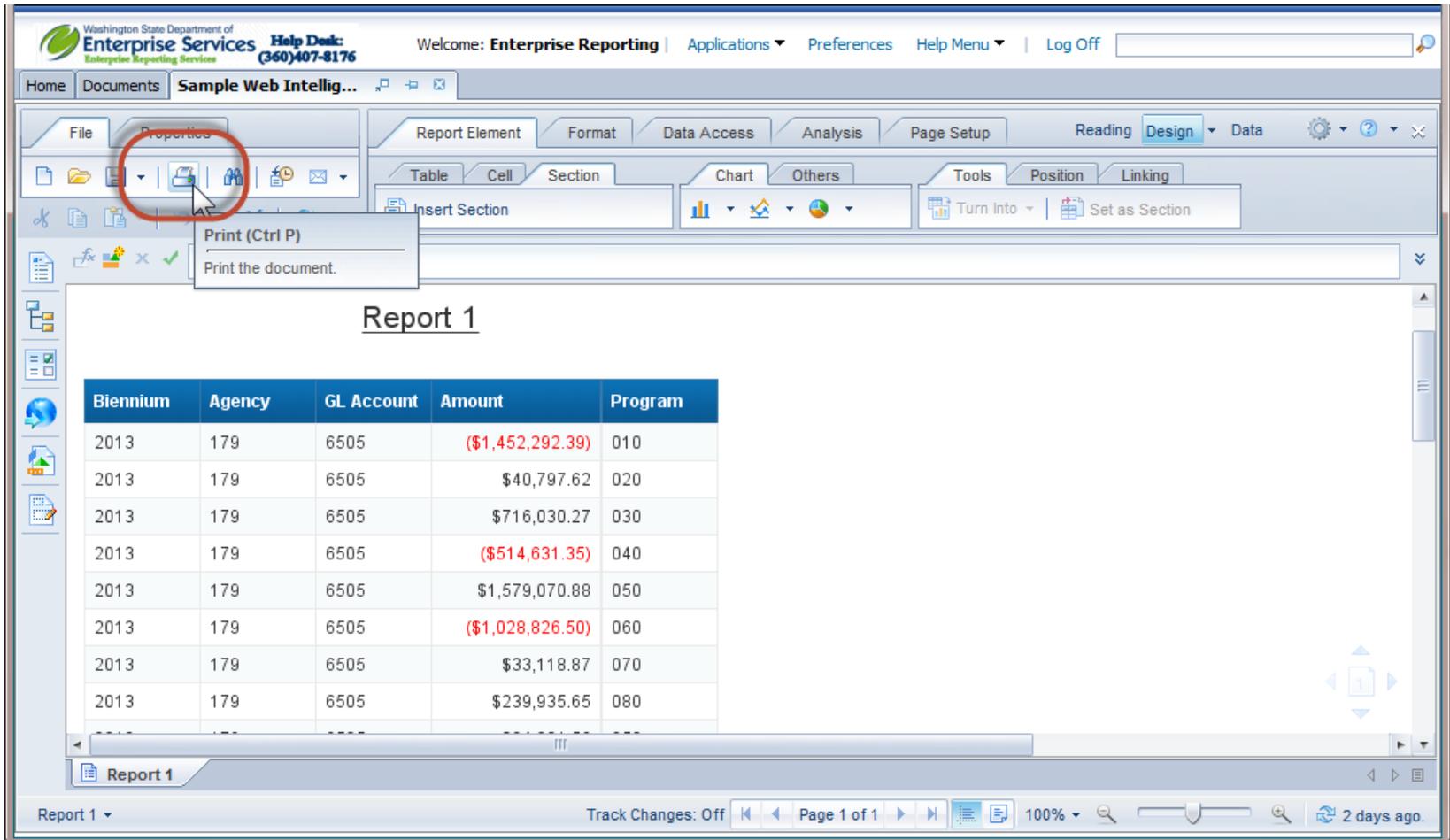
- DEFAULT
- 1,234.57; -1,234.57
- 1.234567E3; -1.234567E3
- 1235; -1235
- 1235; (1235)
- 1234.57; -1234.57
- 1,235; -1,235
- \$1,234.57; (\$1,234.57)**

The selected format is `($#,###0.00)`.

Printing and Exporting Reports

Printing Reports

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



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

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

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

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

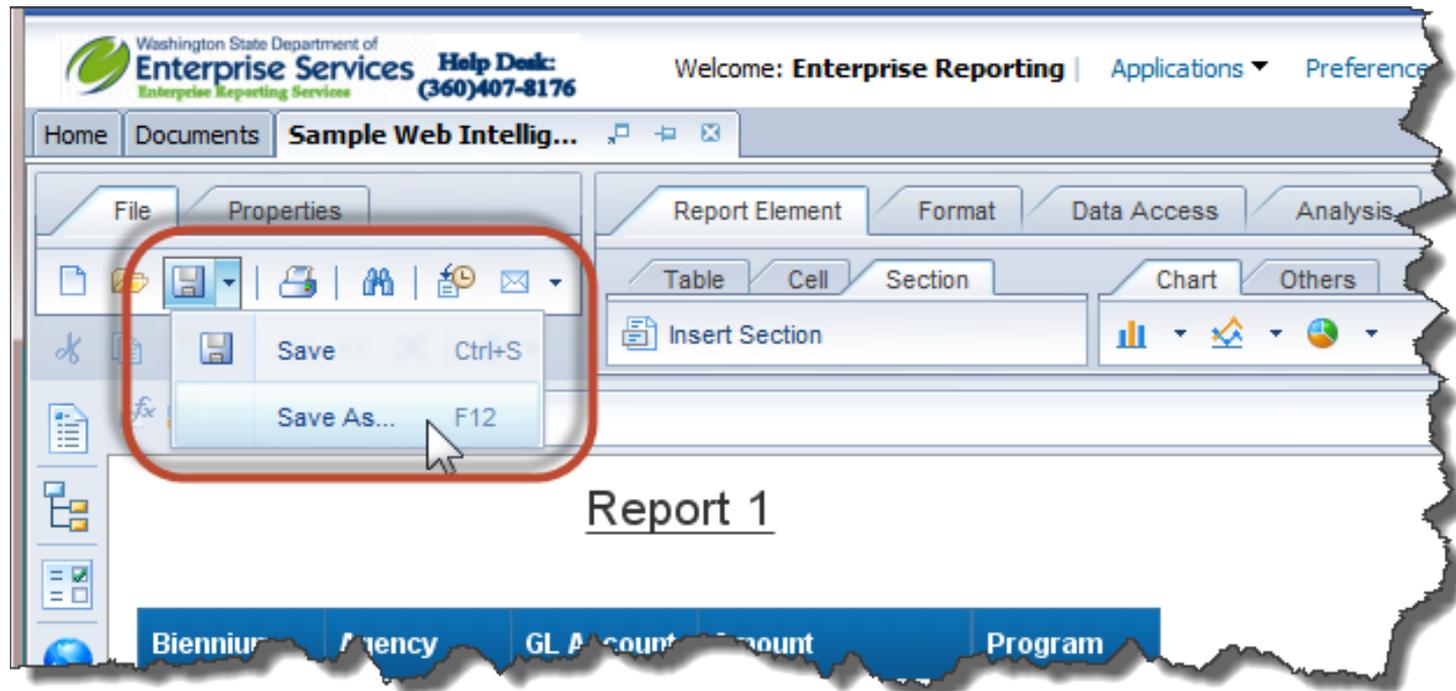
The screenshot shows a 'Print' dialog box with the following settings:

- Printer selection:** Printers: \\encmsoly1005\4074_01_C
- Print Range:** Current Report
 - All
 - Current Page
 - Pages: []Enter page range (example: 1,3,5-11).
- Page Size:** A4 (ISO/DIN & JIS)
- Margins:** Top: 0.79", Left: 0.79", Right: 0.79", Bottom: 0.79"
- Scaling:** Adjust To: 100%
 Fit to: [auto] page(s) wide [auto] page(s) tall
- Orientation:** Portrait, Landscape
- Copies:** Number of copies: 1

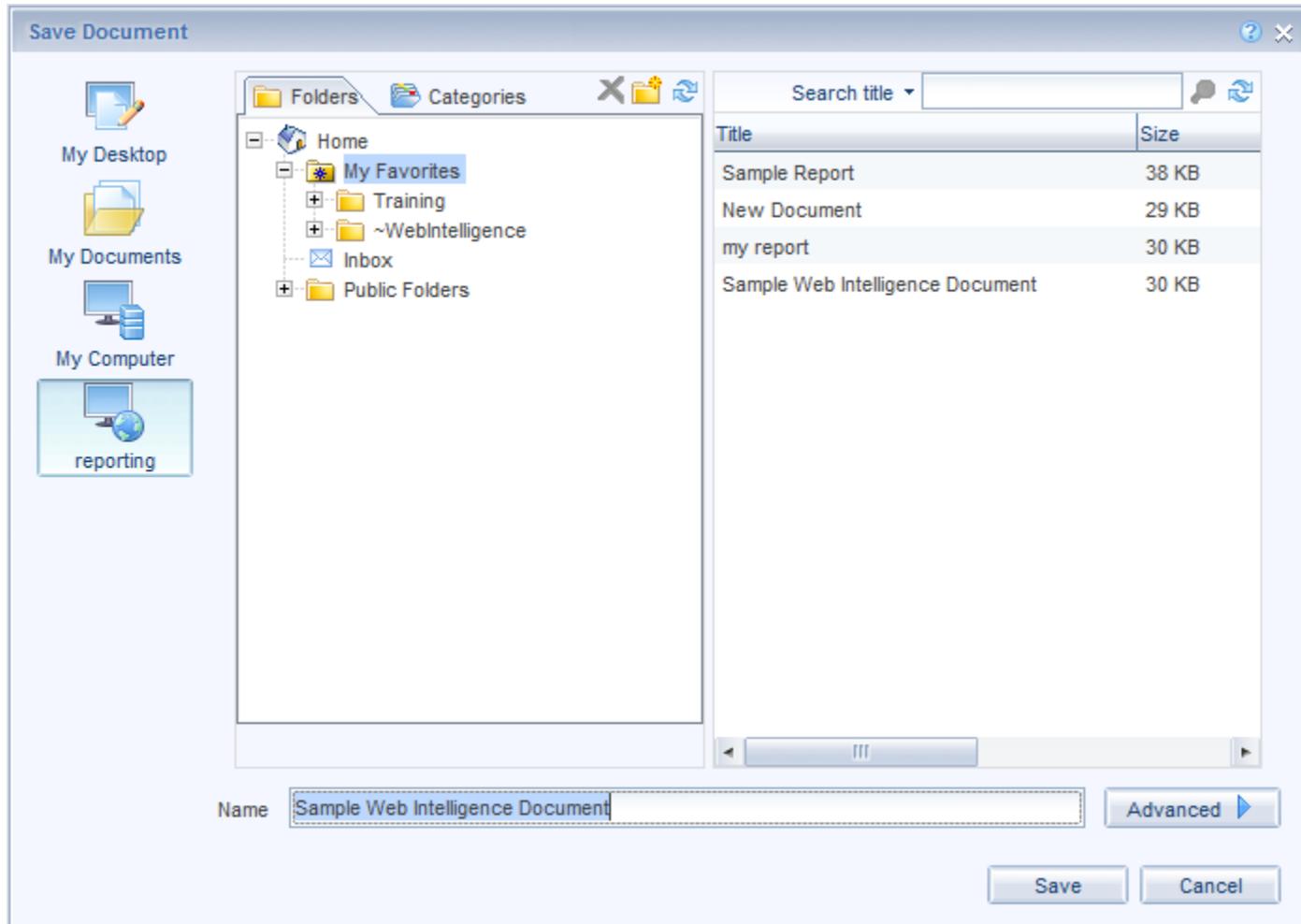
Buttons: OK, Cancel

Exporting Reports

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

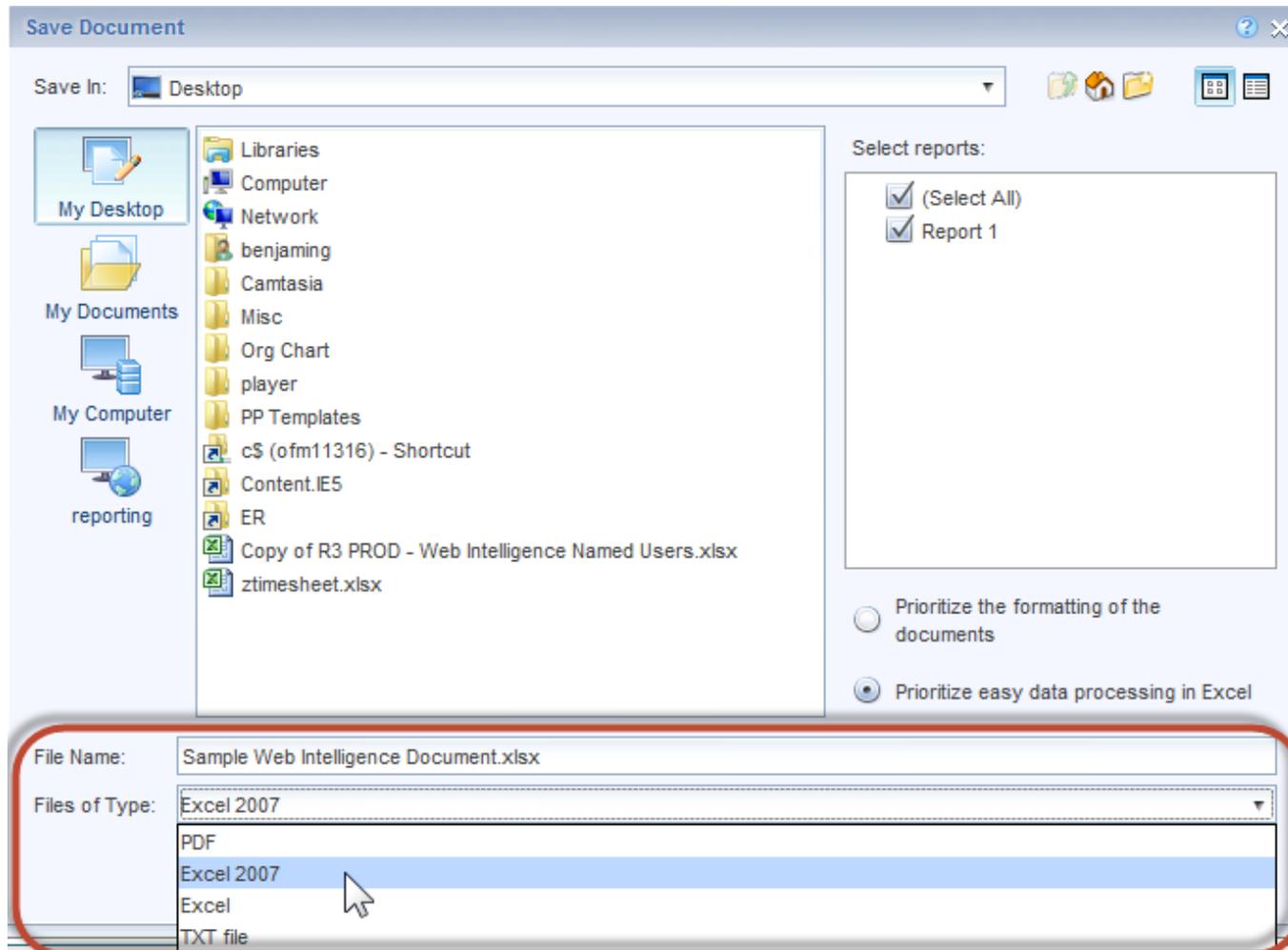


2. When **Save as** is clicked the **Save** dialogue box displays. Select **My Desktop**, **My Documents**, or **My Computer** as the location.

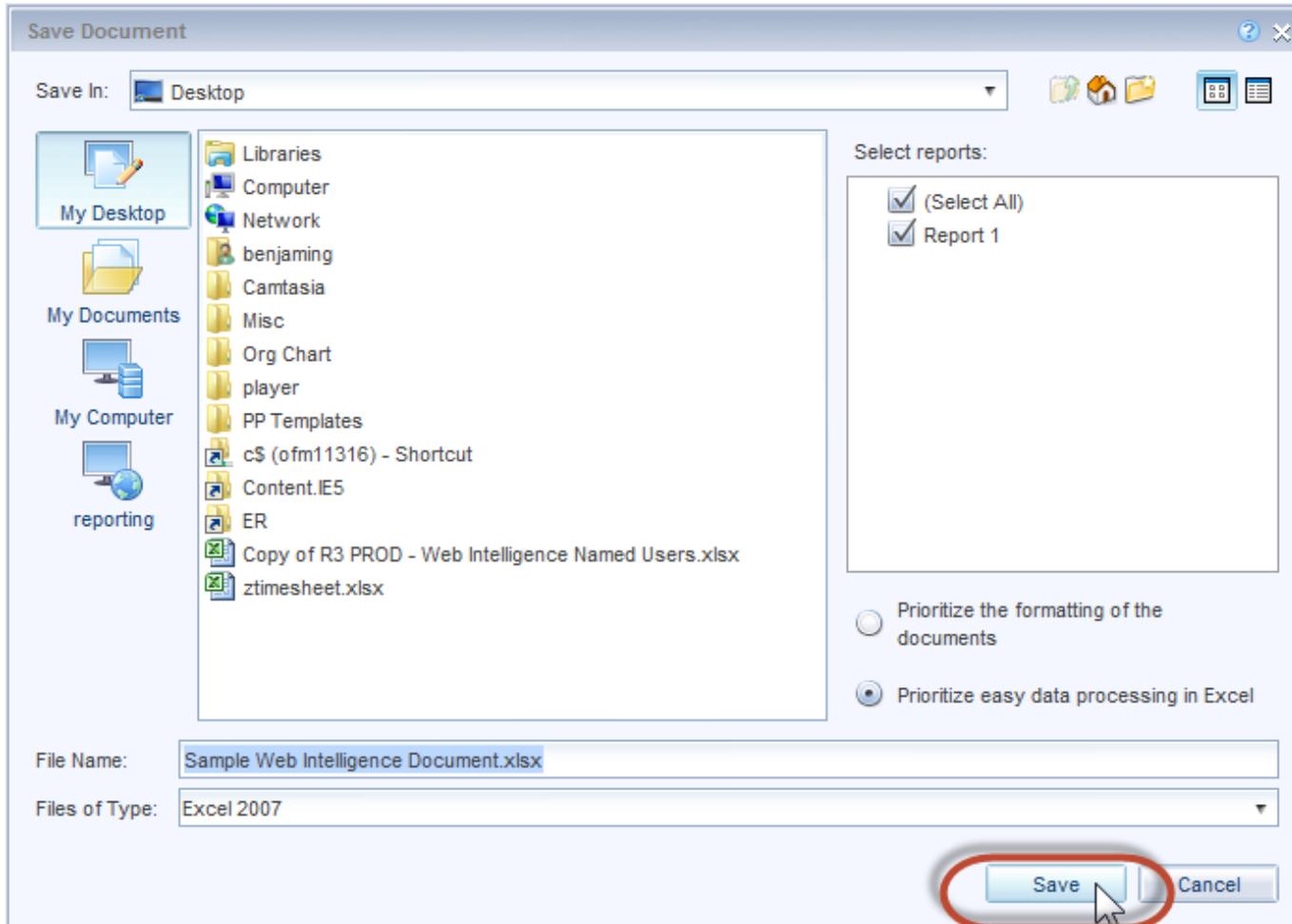


Exporting Reports

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



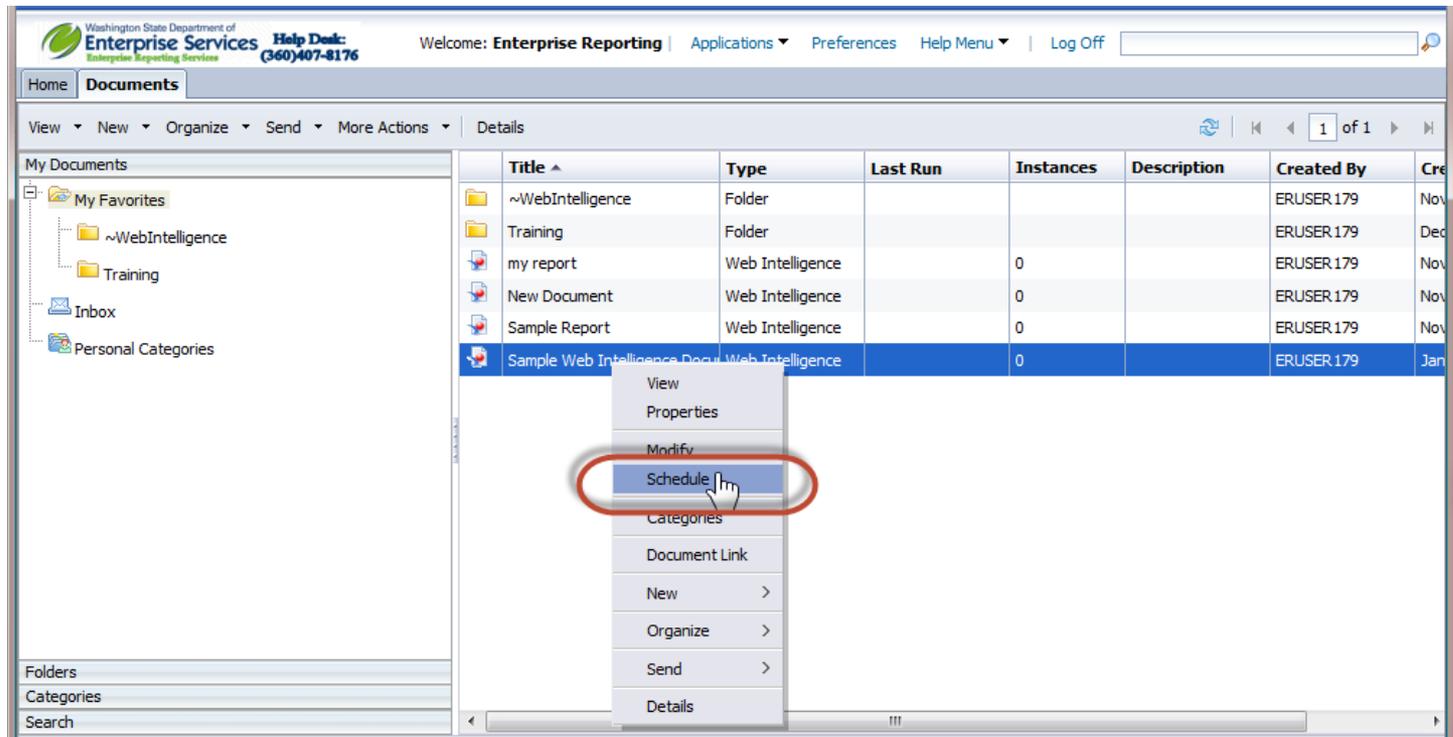
5. Click **Save**.



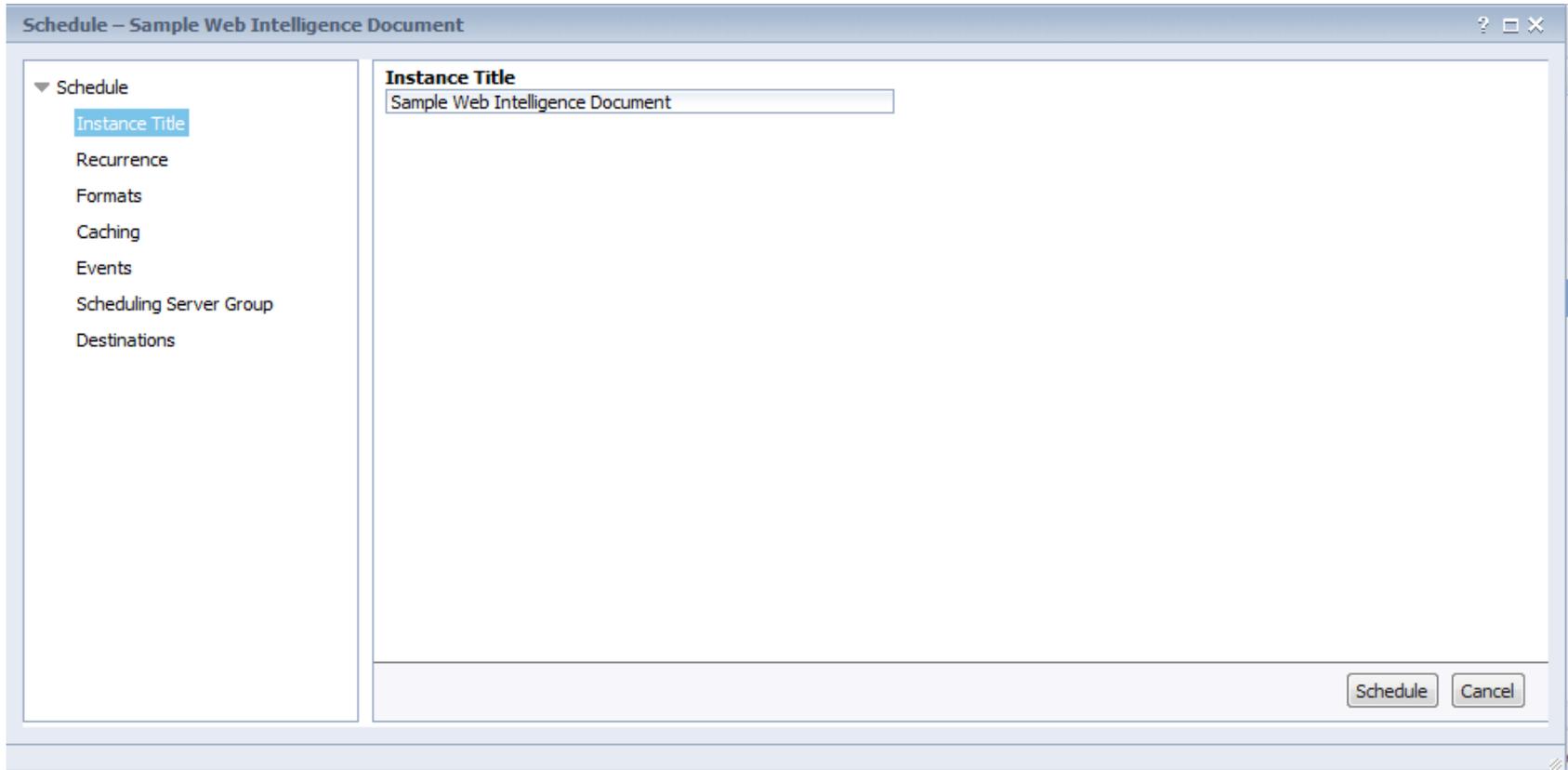
Scheduling Reports

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

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



4. The schedule Dialogue will open.



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

The following additional options are available:

- **Once**

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

- **Hourly**

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

- **Daily**

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

- **Weekly**

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

- **Monthly**

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

- **Nth Day of Month**

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

- **1st Monday of Month**

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

- **Last Day of Month**

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

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

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

- **Calendar**

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

8. Click **Formats**
9. Select the format you want to schedule to from the Output Format list.
10. Click **Destinations**
 - a) Select a destination option
 - b) Select the **Keep an instance in the history** check box if you want to save a copy of the instance.
 - c) Select the **Use default settings** check box if you want to the report to be sent to the logged in user.

You can schedule to the following destination locations:

- **Default Enterprise Location**

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

- **BI Inbox**

This option saves the instance to BI Inboxes specified.

- **Email**

This option sends the instance to the specified email recipients.

- **FTP Server**

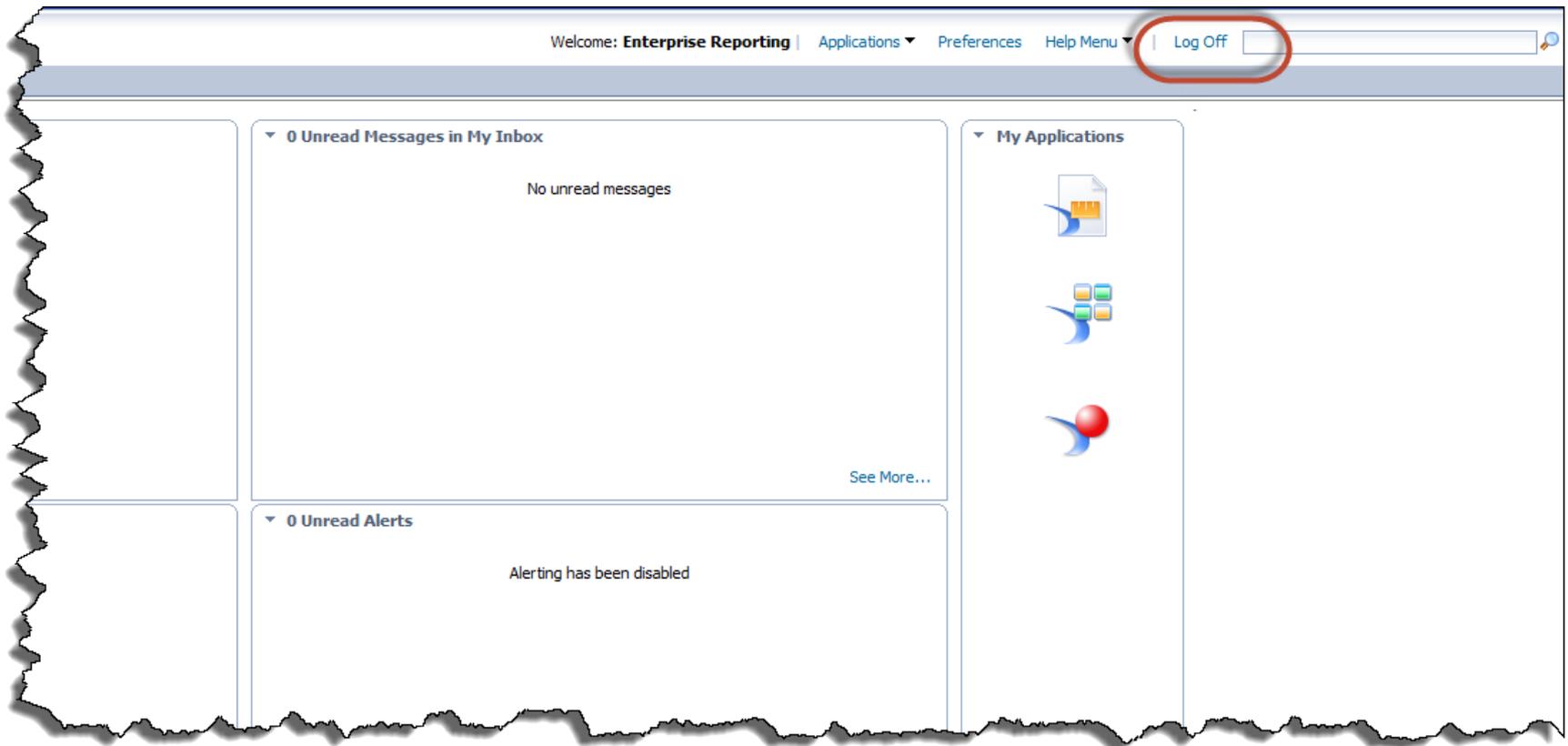
This option saves the instance to the specified FTP server.

- **File System**

This option saves the instance to the specified file location.

11. Click Schedule

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



Questions