

# OSC TRAINING

# BOBJ410

*Developing Guardians of North Carolina's Data*

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER

Updated 7/8/22

# North Carolina Office of the State Controller

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# Introduction

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## Definitions and Launch Pad

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

## Prerequisites

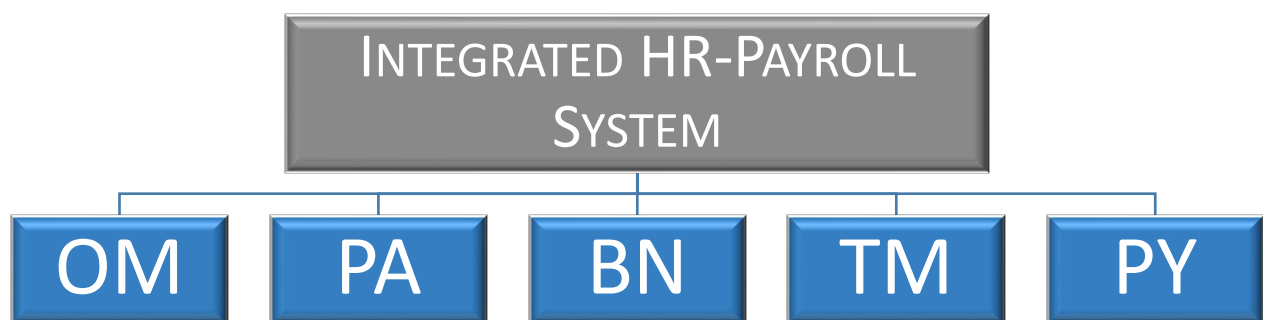
This BOBJ410 student guide includes the required materials for all Business Objects courses including the three online video prerequisites as well as for the instructor-led class.

- BOBJ200 Definition and Launch Pad
- BOBJ220 Crystal
- BOBJ230 WEBI Read

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

## Integrated HR-Payroll Training Curriculum

The Integrated HR-Payroll training program comprises several courses and different modules. This class covers the reporting for all the modules below.



## Strategy for Training

### TELL ME (Concepts)

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

### SHOW ME (Demonstrations)

Instructor will demonstrate job-related tasks performed in the Integrated HR-Payroll System – HANDS OFF.

### LET ME (Exercises)

Student will complete the exercises which allows for hands-on practice in class – HANDS ON

### SUPPORT ME (Availability)

Instructor will be available to answer questions while the students complete the exercises

## Course Map

The lessons covered in this class include:

- Lesson 1: Business Objects Definitions and Launch Pad
- Lesson 2: Dashboard Reports
- Lesson 3: Analysis Application
- Lesson 4: Crystal Reports
- Lesson 5: Web Intelligence - Reading Mode
- Lesson 6: Web Intelligence - Design Mode
- Lesson 7: Course Review



## Course Objectives

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

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

## Reference Materials

The materials below can be accessed through the OSC website. Use the following link to access the OSC website:

<https://www.osc.nc.gov/state-agencies>

- *HR-Payroll Customer Service site:*
  - System Status - This link will be used to announce data load issues and report migrations. The system status page should be checked if you are experiencing any problems or issues with the BOBJ reports or access to see if it is a known issue before contacting BEST to record an incident ticket. This link is located on the OSC Training website.
- *OSC Training site*
  - Integrated HR-Payroll System Course - This site will provide you a list of the BOBJ courses and links to the course descriptions as well as training materials.

- Help Documents - This site contains BOBJ documents such as:
  - Job Aids
  - Known Issues
  - Reference Documents
  - Report Descriptions
- *Other Resources*
  - \_Help Folder within Business Objects Reporting Tools

## ***SUMMARY***

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

# Lesson 1: Business Object Definitions and Launch Pad

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## Objectives

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

## What is Business Objects?

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

## Components of BOBJ

There are five components of BOBJ.

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

## Report Icon Designation

There are four types of objects in BOBJ, and each type has an icon designation with which it is designated. Below are the icons for each type of object.

## *Dashboard*

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

## *Analysis Application*

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Analysis Application, built with Lumira Designer, displays analytical data visualizations in a simple user friendly visual. Analysis Applications require prompt selections for users to generate reports. These reports show a comparison of data through a graphical display and data table.

## *Crystal Reports*

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

## *Web Intelligence (WEBI)*

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

## **Tips**

- Clear your Internet Explorer browser cache before logging in to Business Objects. For instructions on how to clear the cache, see the Clearing Cache in the Internet Explorer Browser job aid located in the Public Folders > HR-Payroll > \_Help > Job Aids folder within the Business Objects Reporting Tool. Also, the job aid is located on the OSC Training website in Help Documents.

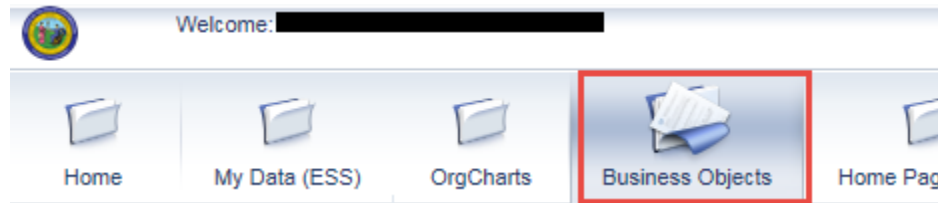
- Do not use the wheel between the left and right mouse buttons when scrolling up and down. It may cause Business Objects to lock up.



- Do not use the back arrow located in the top left corner of your Internet Explorer browser. The Business Objects application will crash.

## Accessing Business Objects

It is now time to access Business Objects by logging into the Integrated HR-Payroll System Portal using your NCID and password. On the Portal Home Page, click on the Business Objects tab.



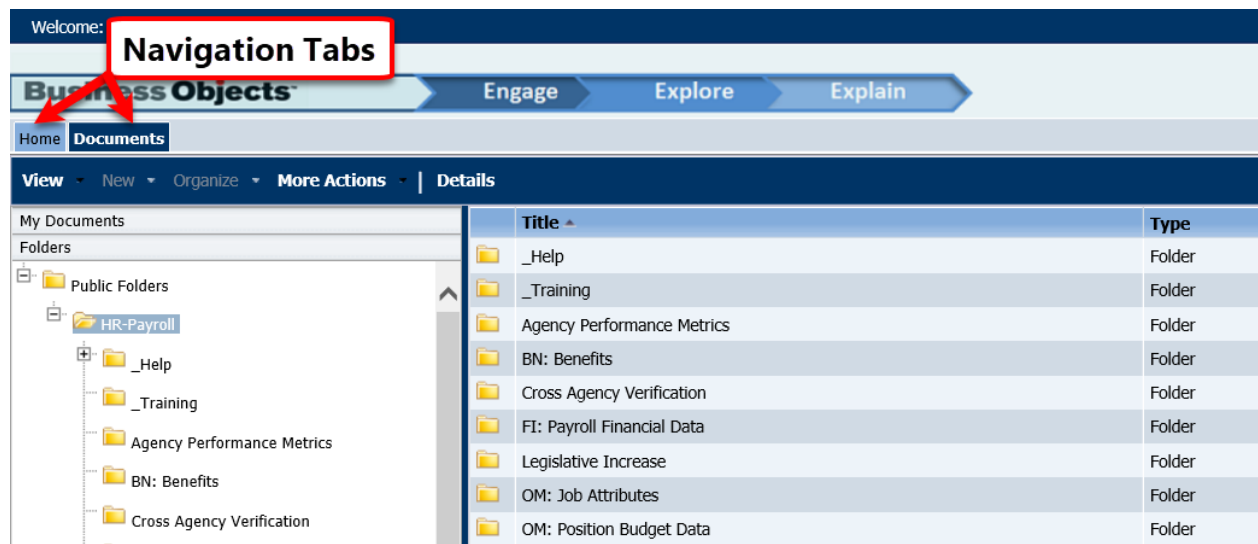
### INFORMATION

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

## Launch Pad

Once logged into the Integrated HR-Payroll System and select the Business Objects tab is selected, the Launch Pad will open providing access to the reports and information housed in BOBJ. The data in BOBJ is refreshed overnight for next day access except for quota related data. Quota related data is updated every Wednesday and Saturday nights due to the large volume of data.

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



## Screen Components of Launch Pad

### Navigation Tabs

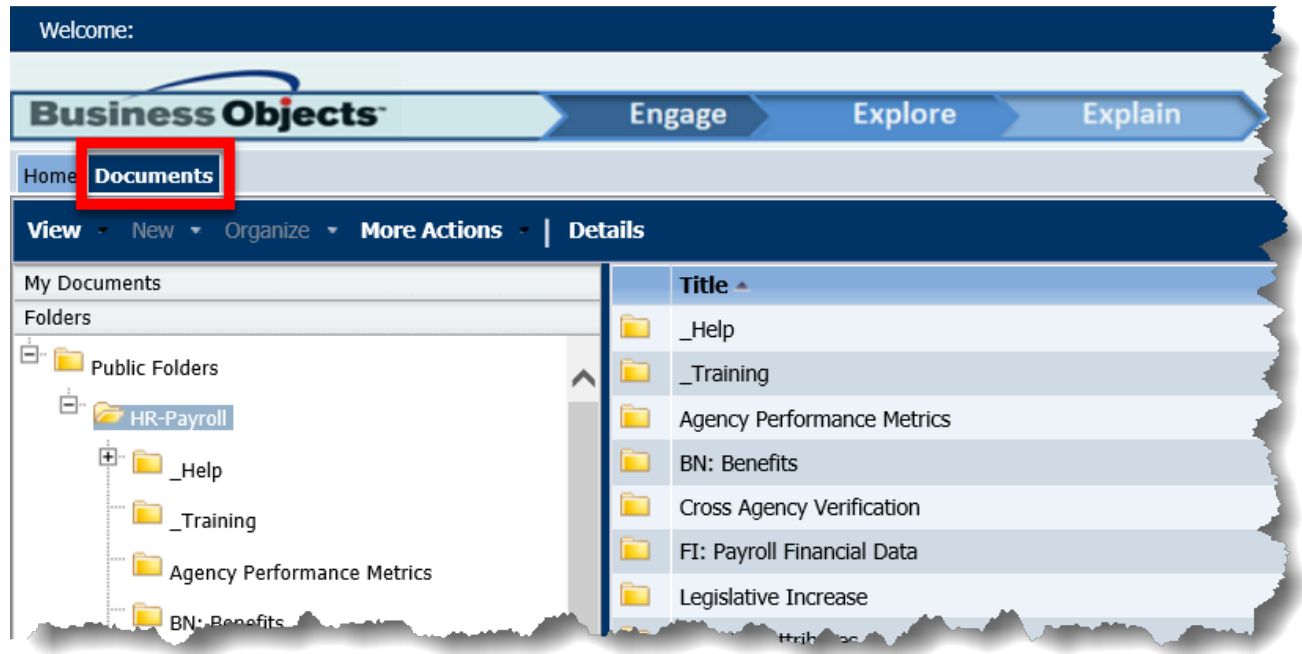
#### Home Tab



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

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

### Documents Tab



The Documents Tab provides access to the repository of business intelligence content and provides a left-hand navigation panel. This view is similar to the one in Windows Explorer. When a folder in the left navigation panel is clicked, the objects stored in the folder will be displayed in the workspace panel. The folders that are displayed within the Public Folders are determined by each user's roles and security authorization.

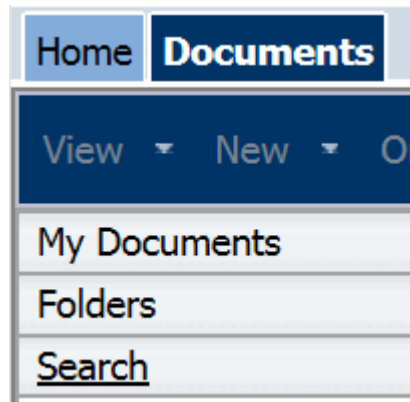
- **Toolbar Options on the Documents Tab**
  - **View** - Use to view selected object, the latest instances of the object, and object properties
  - **New** - Allows the ability to upload local documents and create folders to the My Documents Drawer/My Favorites folder. Not available for use in the Folders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

## Navigation Panel

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

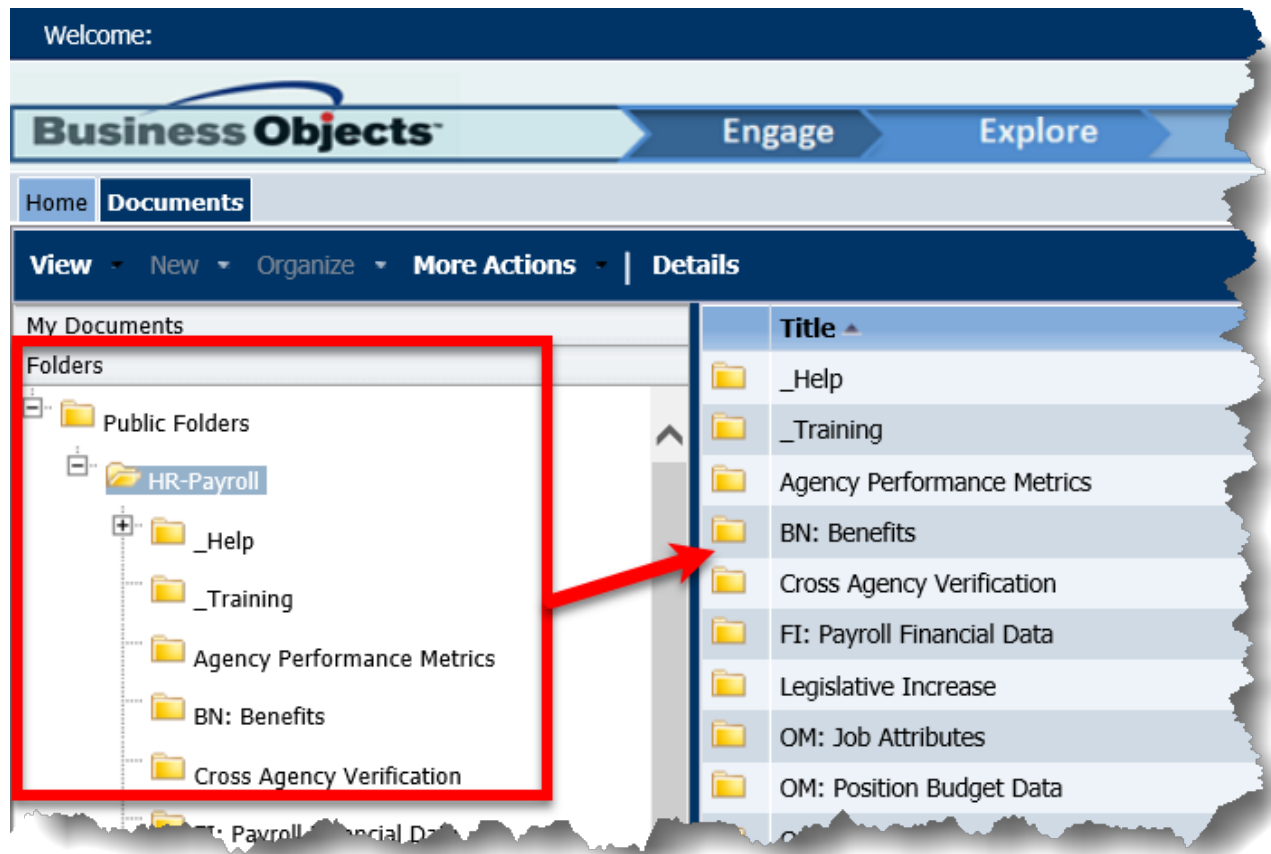
- **Drawers** - expandable panes on the navigation panel allow easy switching different views of the repository. The following drawers are available:
  - **My Documents** - Displays the user's My Favorites Folder
  - **Folders** - Displays a folder view of the public repository
  - **Search** - Displays search options and results



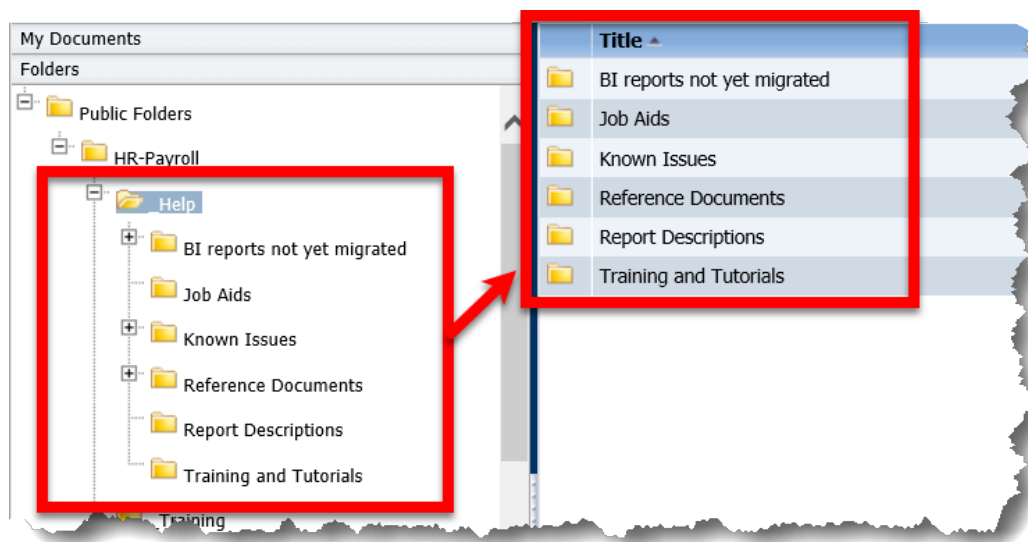
### Default View – Folders

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

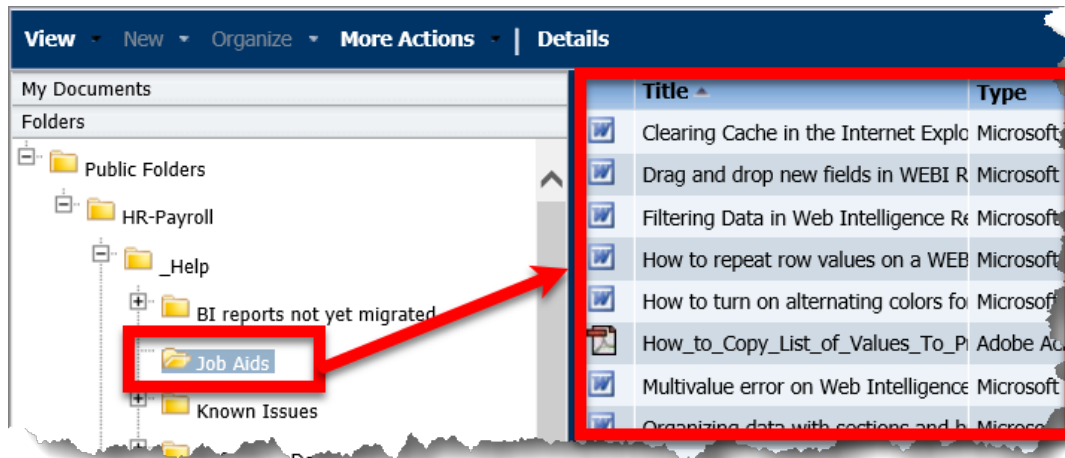





### Folder View



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

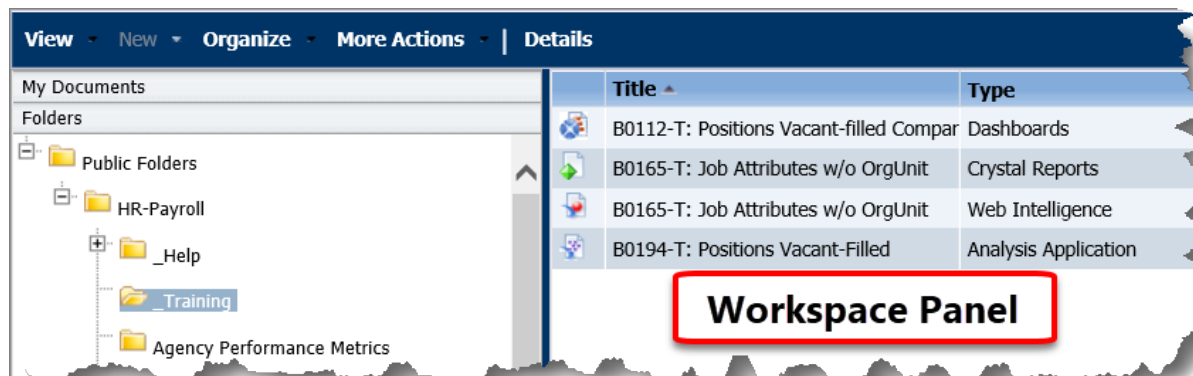


**NOTE:** The folders that are displayed within the Public Folders are determined by each user's roles and security authorization.

**NOTE:** To resize the Navigation Panel, move the mouse over the left edge of the Workspace Panel until double arrows display (  ), right click and drag the edge of the panel to the left or right. When the Navigation Panel is sized appropriately, release the mouse button.

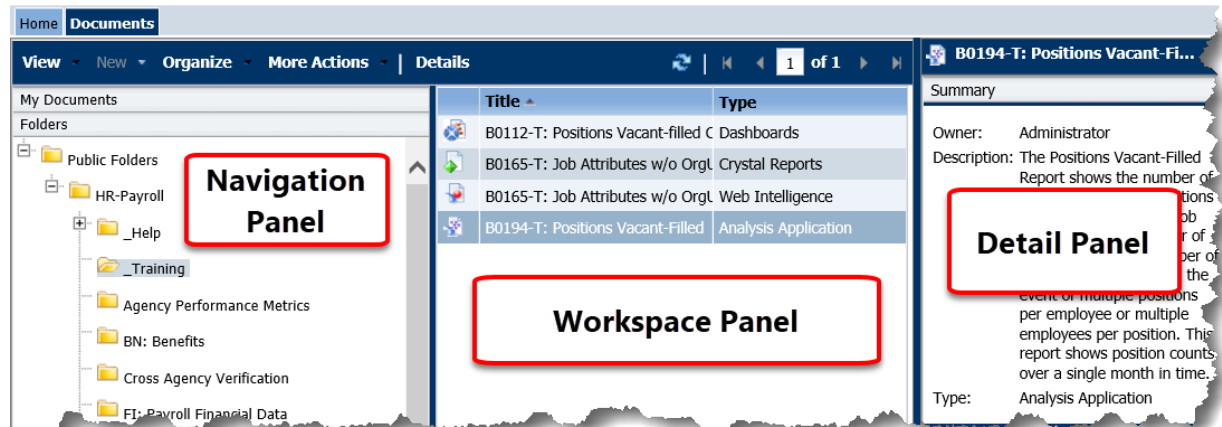
## Workspace Panel

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



## Details Panel

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

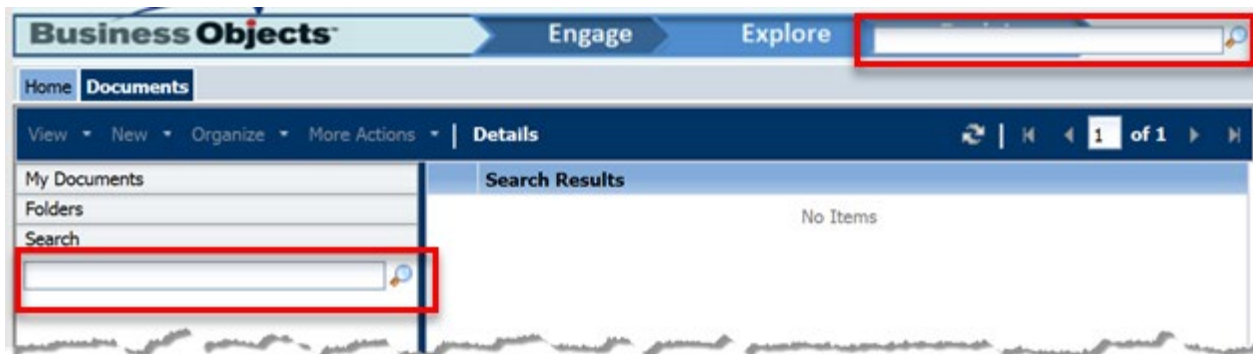


To close the Details Panel, click on the X located in the top right corner of the Details Panel or click on the arrow located on the left edge of the details panel or click on the Details Tab.

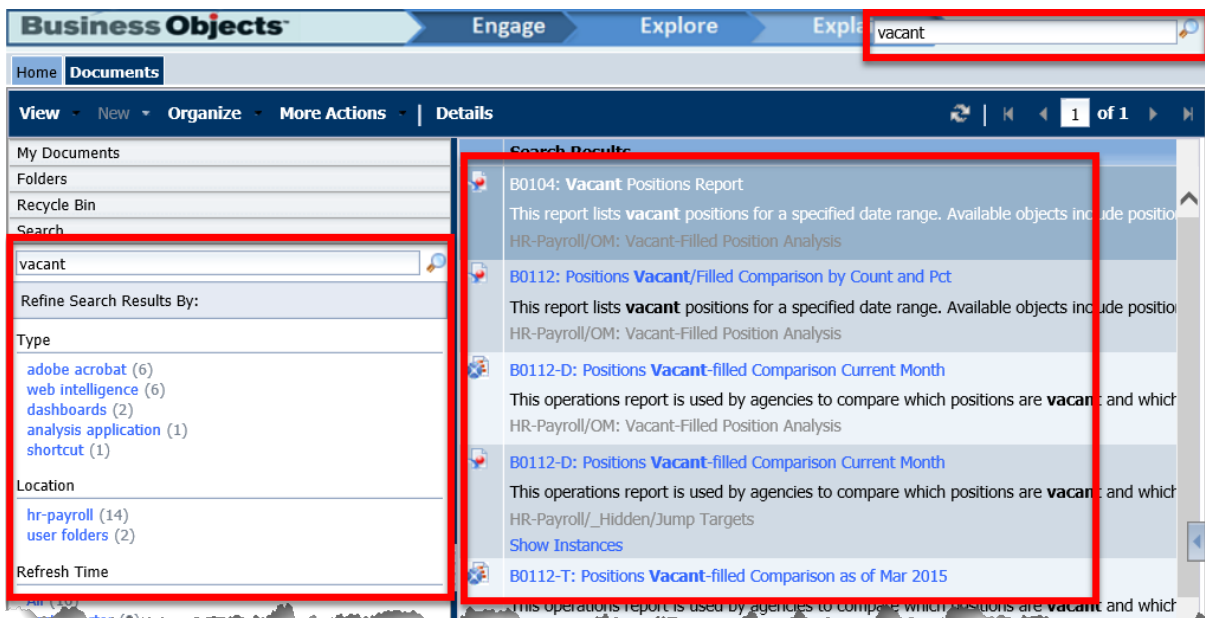
## Working with Documents on Launch Pad

### Search for a Document

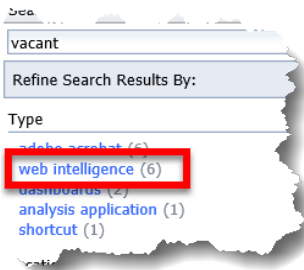
Within Launch Pad, a search for documents containing specific words in their titles can be performed. Once the search is executed, results on other dimensions can be filtered. The document can also be directly viewed from the list. There are two searchable fields on the screen. One is found in the left navigation panel, and the other is found at the top right corner of the Business Objects window. The search feature on the Launch Pad is not case sensitive.



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



Search results can be refined by using the default results in the left navigation panel to narrow the choices returned. For example, to see only search results for WEBI Reports, click on the web intelligence link in the type box.



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



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

This action returns all original search results.

To open a report from the search results, double click the report. The report object will open in the format selected.

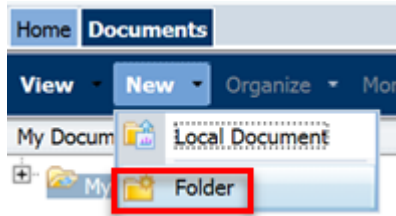
Hovering over a report in the list or single clicking the report will display an information box showing the Description, Type and Location of the Report:



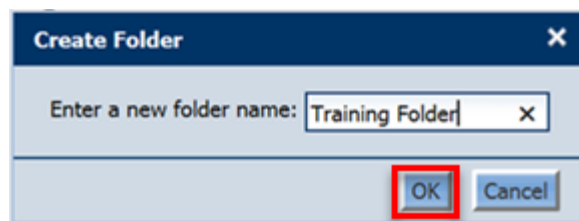
## Create New Folder in My Favorites Folder

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

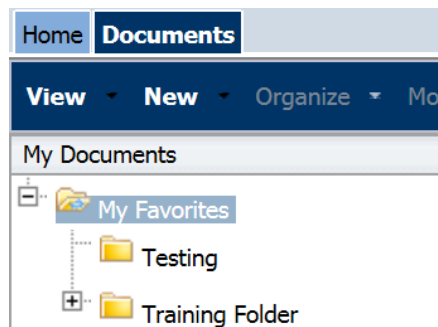
1. Click on the My Documents drawer and select the My Favorites folder, click on the New option located in the toolbar and select Folder:



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



3. Then you will see your new folders listed.



## Create a Shortcut to a Document

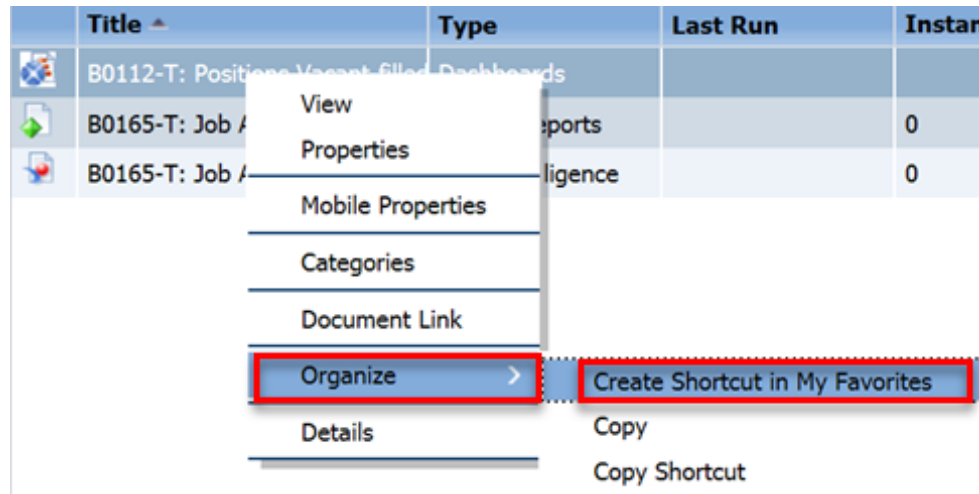
To to make a document available in multiple folders in BI Launch Pad, but do not want to maintain duplicates, you can create a shortcut to the document in other folders located in the My Documents drawer/My Favorites folder. As previously stated, these documents/shortcut reports are available and viewable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

### Create Shortcut in My Favorites

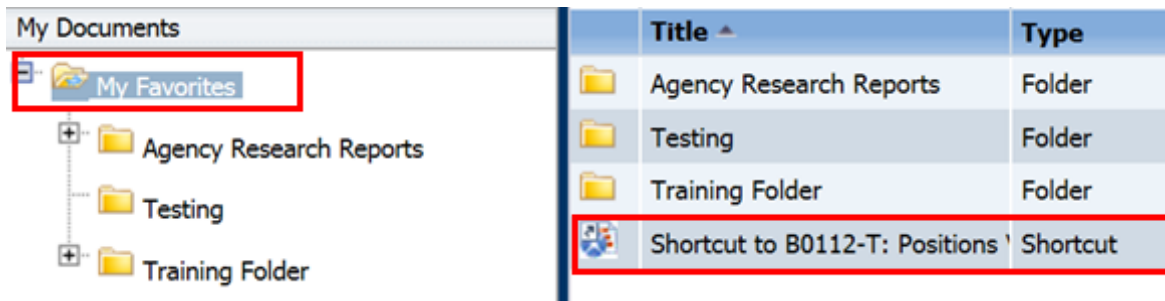
When using the Create Shortcut in My Favorites, the report will be saved automatically to the My Favorites Folder. Choose this option to customize how you access a report.

**NOTE:** The report created as a shortcut will reflect any changes made to the original report in the Public Folders.

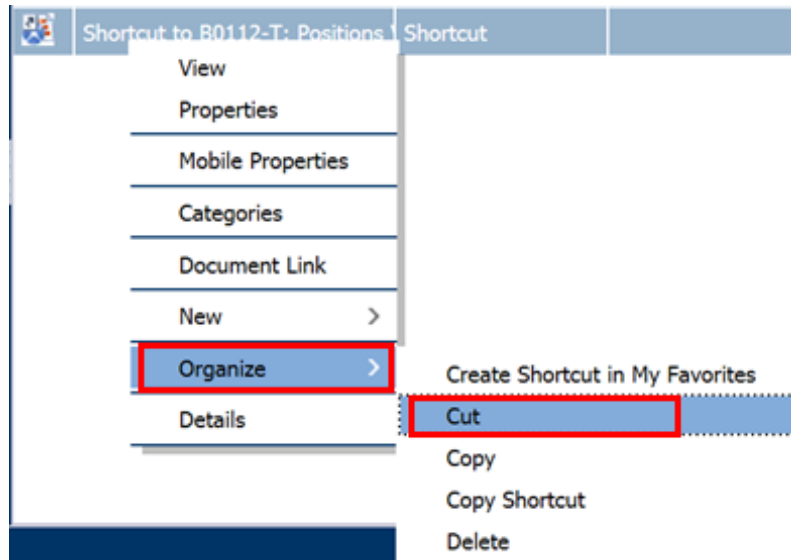
1. Select the report in the Workspace and right click on the report. Then select Organize, Create Shortcut in My Favorites.



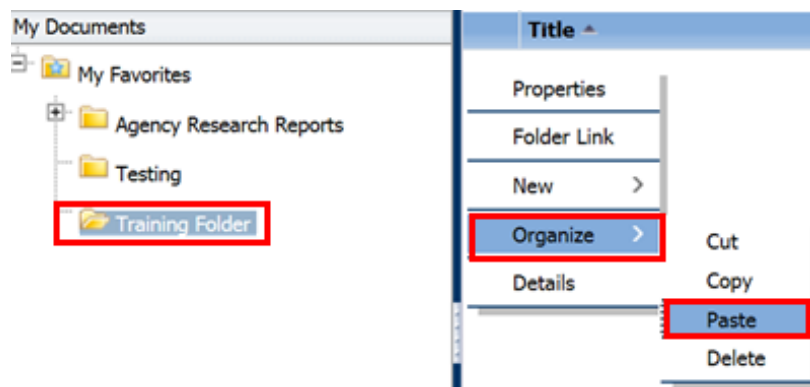
2. Open the My Documents Drawer to see the shortcut document in the My Favorites folder.



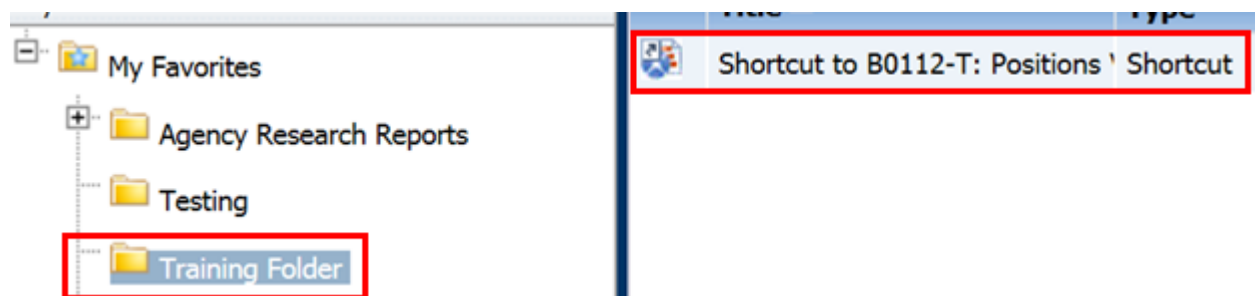
3. You can move the shortcut document to another folder located in the My Documents drawer if you would like to organize your personal folder. To move the shortcut document, right click on the shortcut document, select Organize, Cut.



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

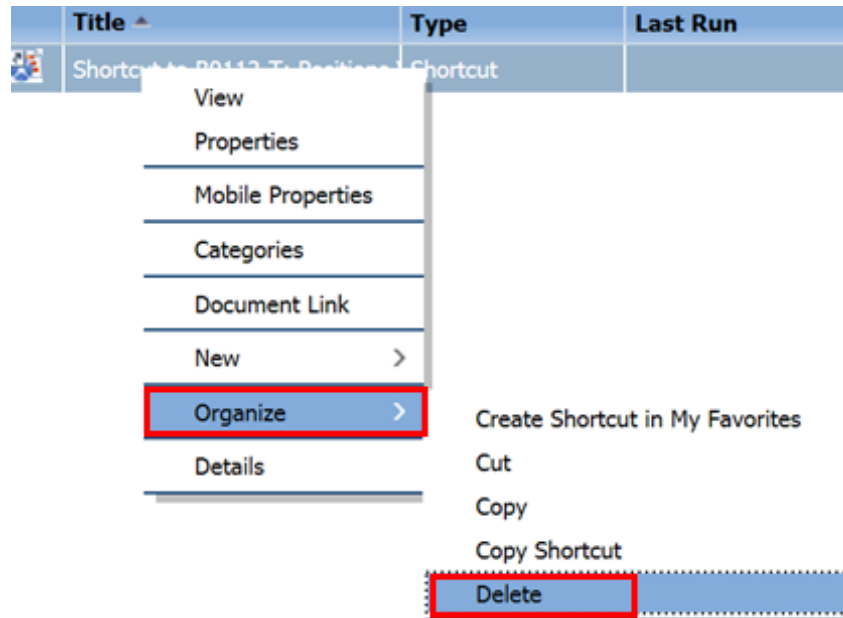


5. Once the report is pasted in the appropriate folder, it will appear in the Workspace.





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

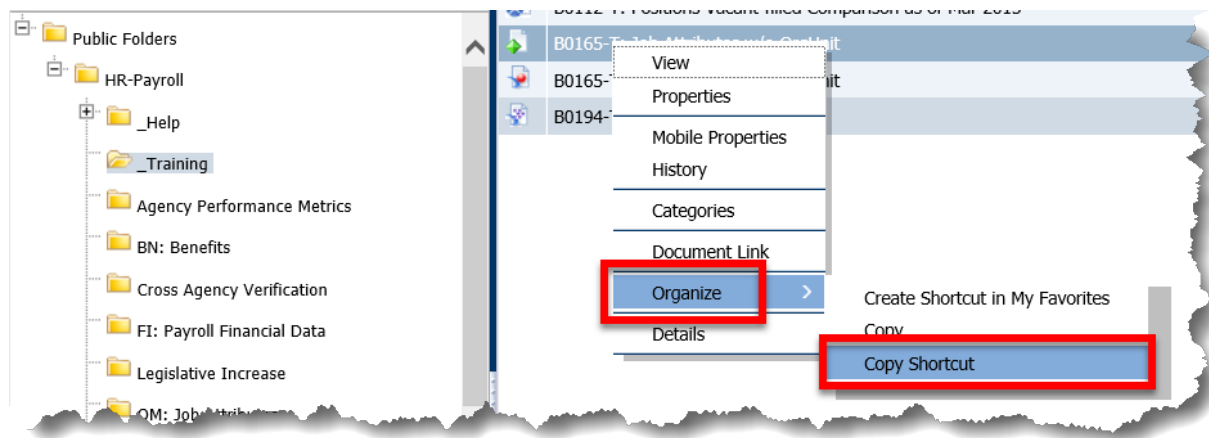


### Copy Shortcut

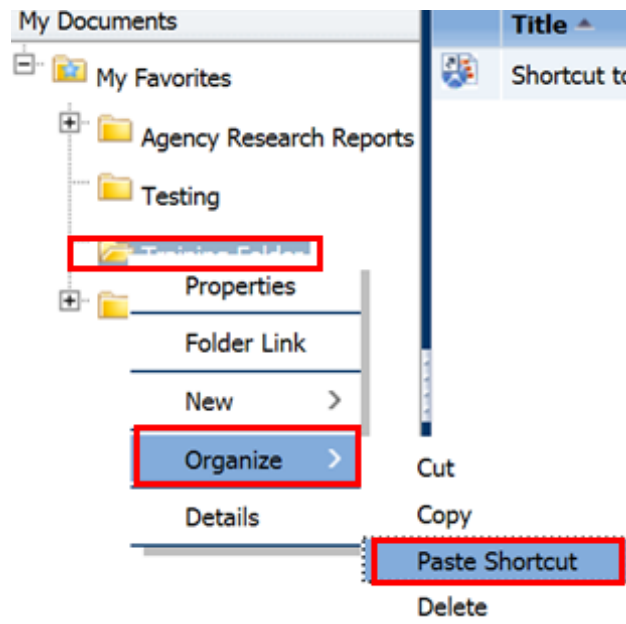
If you select this option, the report will not be saved automatically in the My Favorites folder. You must select the appropriate folder located in the My Documents drawer where you want the shortcut to be located. Choose this option if you want to customize how you access a report.

**NOTE:** The report created as a shortcut will reflect any changes made to the original report in the Public Folders.

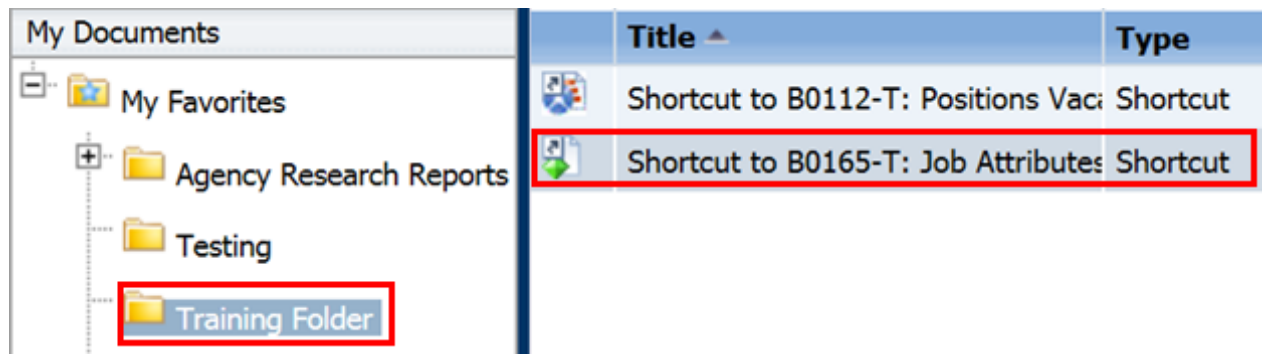
- Select the report in the Public Folders Workspace and right click the mouse. Then select Organize, Copy Shortcut.



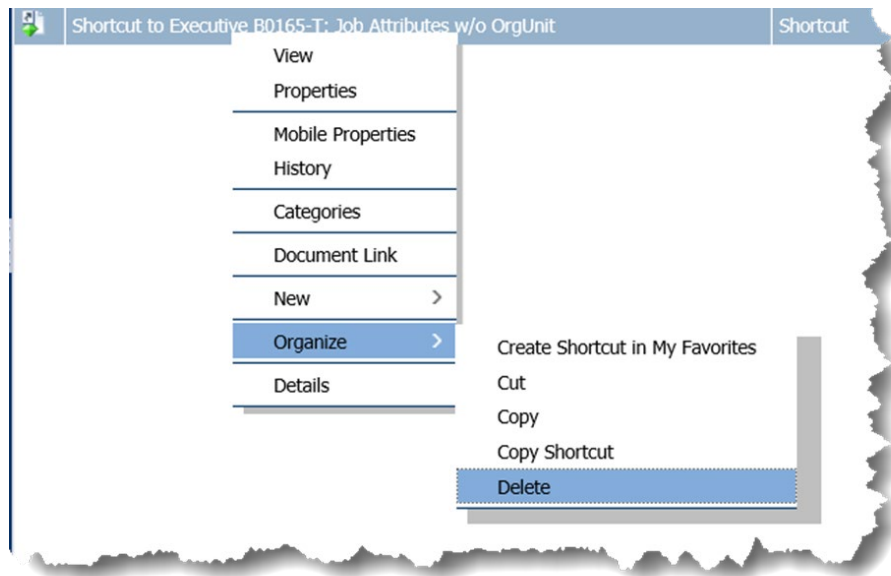
2. Open the My Documents Drawer and browse to the folder where you want the shortcut to be located. Select the folder and right click the mouse. Then select Organize, Paste Shortcut.



3. Once the report is pasted in the folder, it will appear in the Workspace Panel.



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

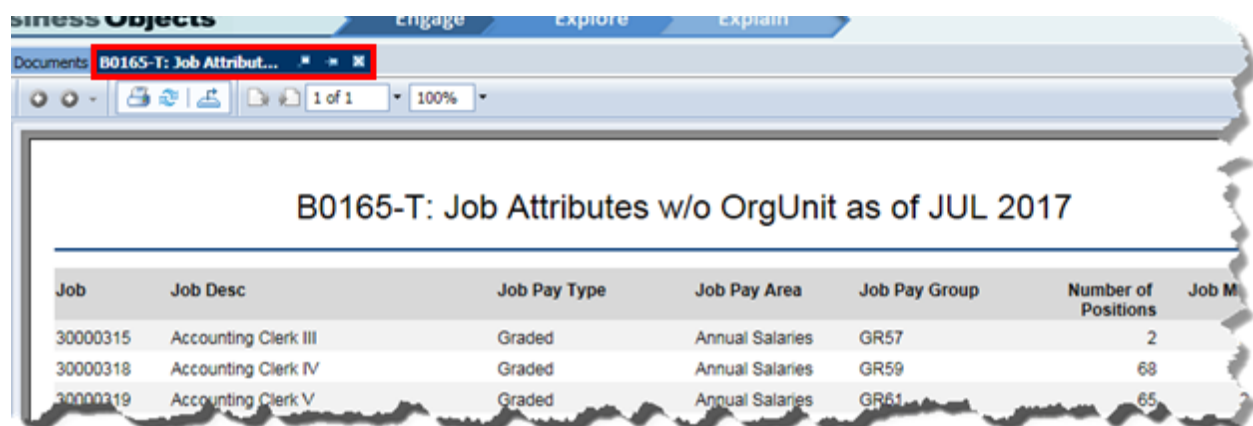


INFORMATION

*If you select the **Copy** option, the report will not reflect any changes made to the original report in the Public Folders.*

### Opening Objects or Reports from Launch Pad (Public Folders)

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



**NOTE:** You can right-click on the report and select View from the menu. You can also single click on the report and click View on the toolbar option.

## Pin a Report for Future Viewing

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

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



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




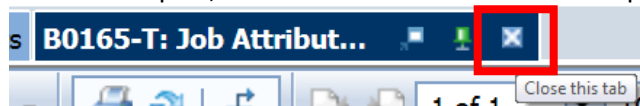
Click on the report tab to open the report.

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



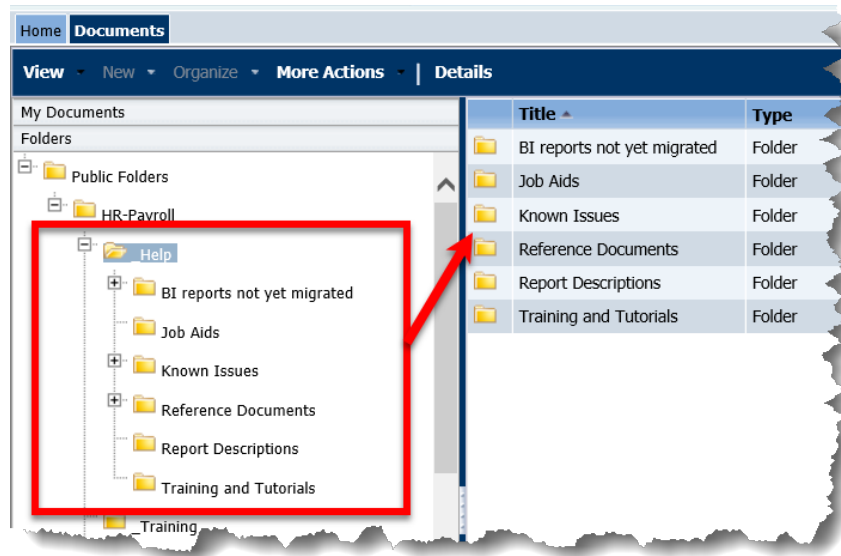
## Close a Report

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



## Help Folder

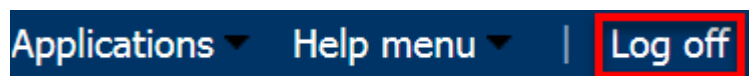
If you are experiencing any issues or have any questions regarding Business Objects, refer to the \_Help folder located in the Documents tab > Public Folders > HR-Payroll folder. The \_Help folder is designed to provide BOBJ users with Job Aids, Known Issues, Reference Documents, Report Descriptions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



**NOTE:** As previously stated in Lesson 1, this information is also available on the OSC Training website in Help Documents.

## Logging Off

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



## SUMMARY

In this lesson, you learned to:

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

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## Lesson 2: Business Objects - Dashboard Reports

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### Objectives

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

### Definition of Dashboard Reports

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

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



#### INFORMATION

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

## Components of Dashboard Reports

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

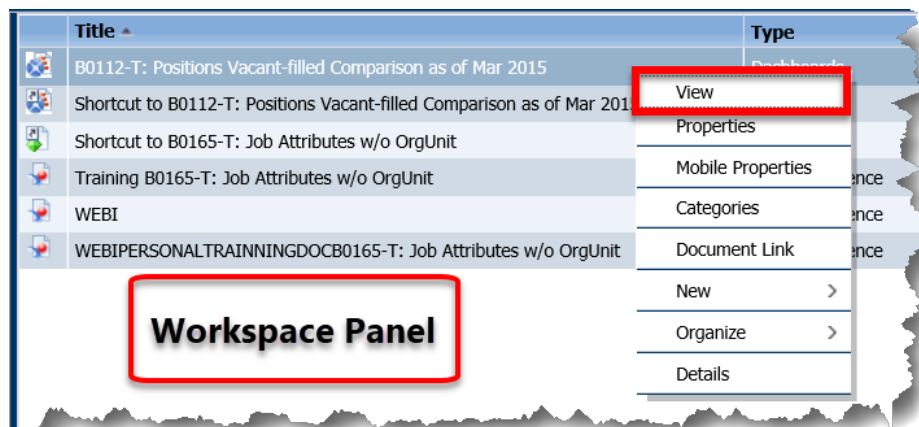
- **Line Chart** - The "Line Chart" is ideal for showing tendency over a period of time. Use this chart in models which emphasize a trend or a continuing sequence of data.
- **Pie Chart** - The "Pie Chart" is a circular chart that represents the distribution or participation of each item (represented by a slice) of a certain total that is represented as the overall pie value.
- **Stacked Area Chart** - This standard chart has vertical and horizontal axis. Each point along the horizontal axis represents a data point. The actual values for the data points are plotted against the vertical axis, with each series adding to the total value.
- **Stacked Column Chart and Stacked Bar Chart** - These are multi-bar charts that show and compare one or more variables, with each variable adding to the total value. These charts compare several variables over a period of time for example, marketing cost and administrative cost. Each one of the cost components is presented in a different color, and each bar represents a different time period. The total bar size represents the total cost.

## To Open and View a Dashboard Report

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

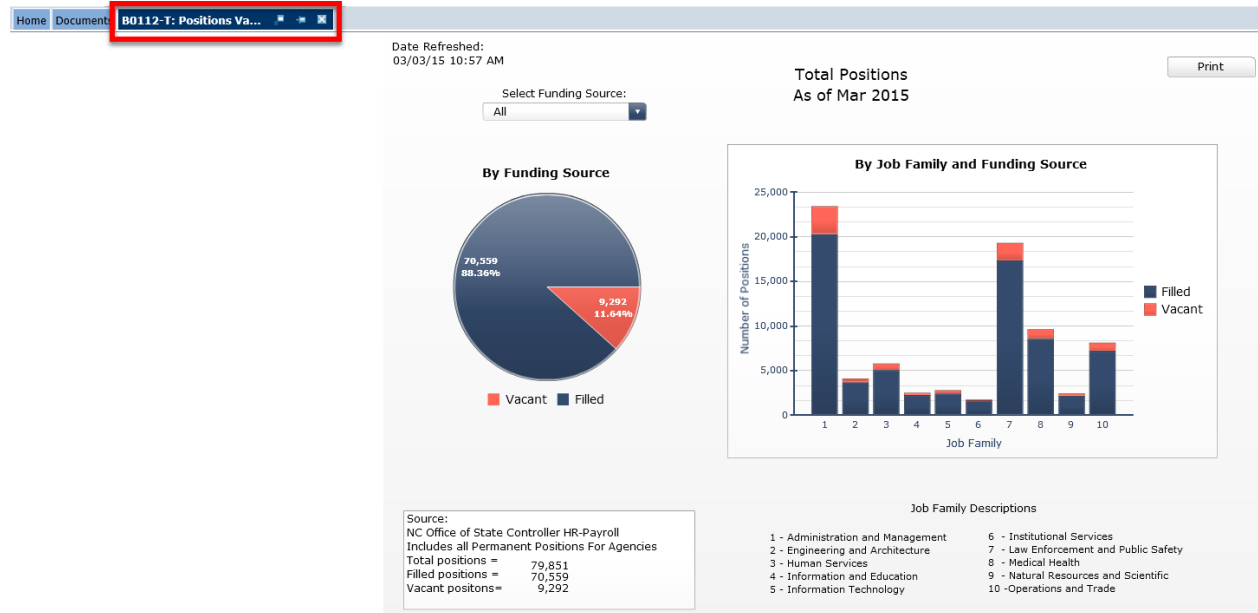
**NOTE:** Also, the report can be in the Home tab, My Recently Viewed Documents.

1. Double-click on the B0112-T report title in the workspace panel. Also, you can right click on the report title and select View.





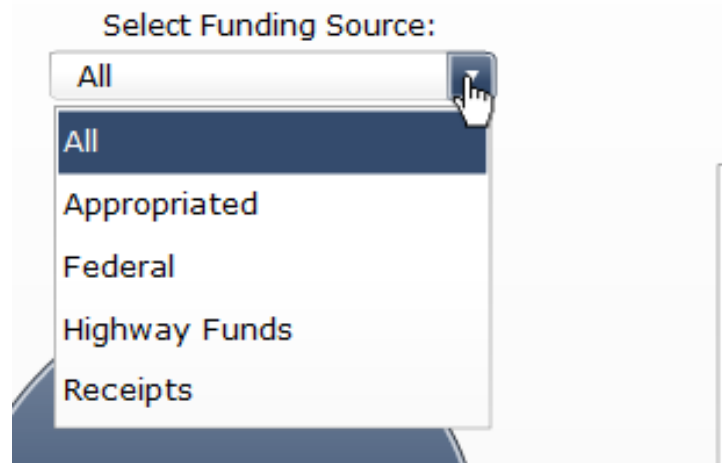
- The dashboard will load in a new tab. Only the data displayed on the screen is available for view. To dissect data, access the information using either the Crystal or WEBI format - dependent on the report build.



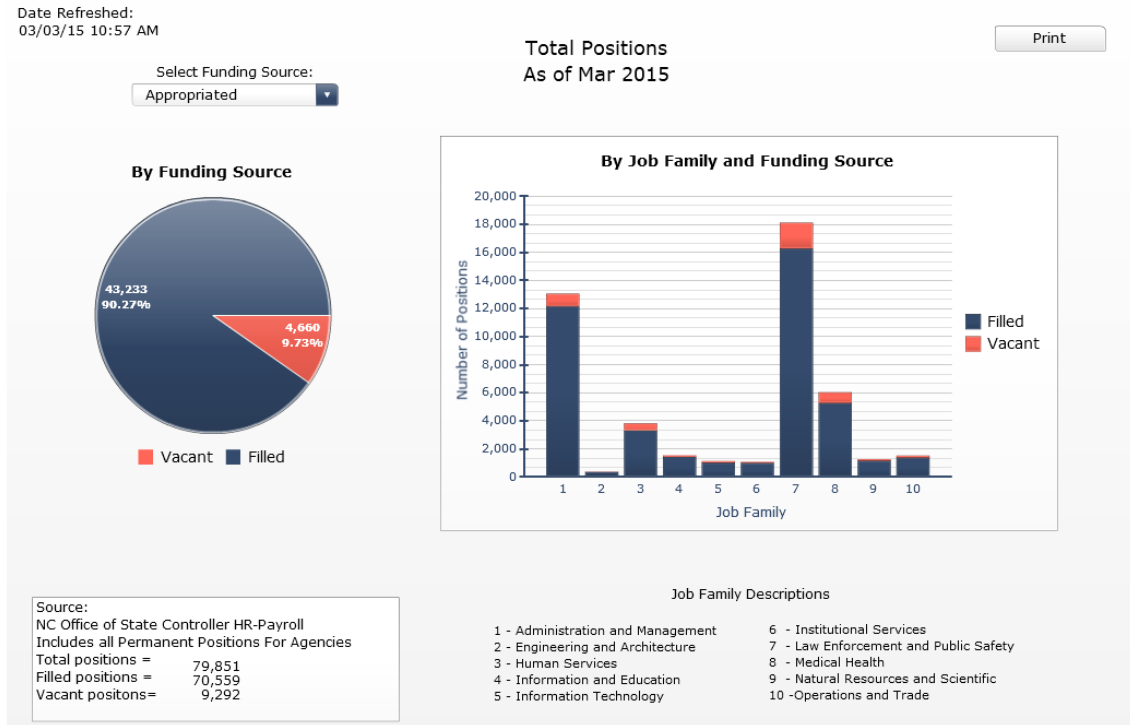
**NOTE:** There is a Data Refreshed area on the dashboard to advise the last date the data in the report was updated.

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

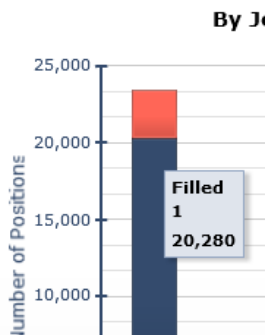
- The data initially loaded in this sample dashboard report includes all statewide data. You can change the data in the dashboard by using the drop-down box and selecting from the values.



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



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



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



**NOTE:** Change your page layout option to landscape when printing a report. The report will print better in landscape than in portrait layout.

## ***SUMMARY***

In this lesson, you learned to:

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

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# Lesson 3: Business Objects – Analysis Application

## Objectives

- Understand the definition of Analysis Application
- Open and view Analysis Application reports
- Identify the components of Analysis Application

## Definition of Analysis Application

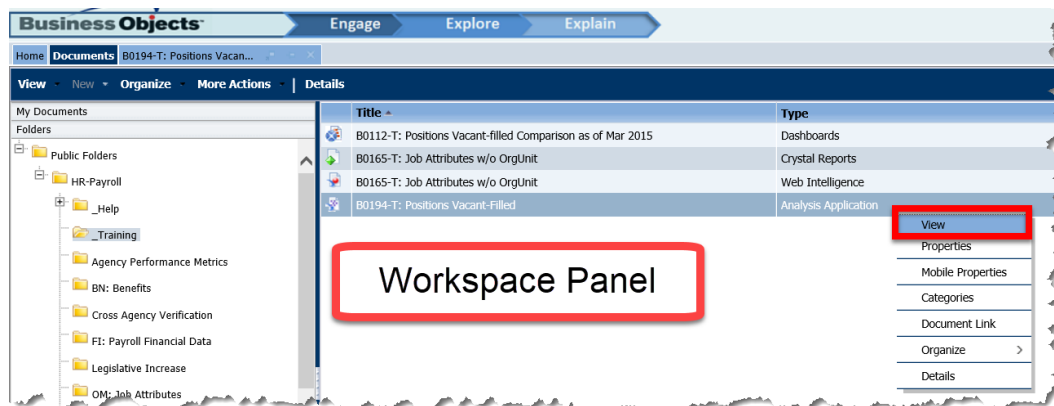
Analysis Application, built with Lumira Designer, displays powerful analytical data visualizations in a quick user-friendly format. Analysis Application are delivered reports with prompt selections for users to generate reports. These reports show a comparison of data through a graphical display and data table.

## To Open and View an Analysis Application

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

**NOTE:** Reports also can be displayed in the Home tab, in the My Recently Viewed Documents, if the report has been previously opened it.

1. Double-click on the B0165-T Analysis Application title in the Workspace Panel. Also you can right click on the report title and select View.



Once the report is open, you will see a Prompts box. This box contains the values that are defined for the report. The number of mandatory prompts is listed in the bottom left side of the prompt box. You must enter a value in the mandatory prompts before you can view the report. Mandatory prompts are designated by an asterisk (\*).


**NOTE:** The OK button will be grayed out until all the mandatory prompts have a selected value.

- Click the arrow to the right of the prompt description to enter a value into a prompt box. This opens the prompt box. The box is split into five sections.

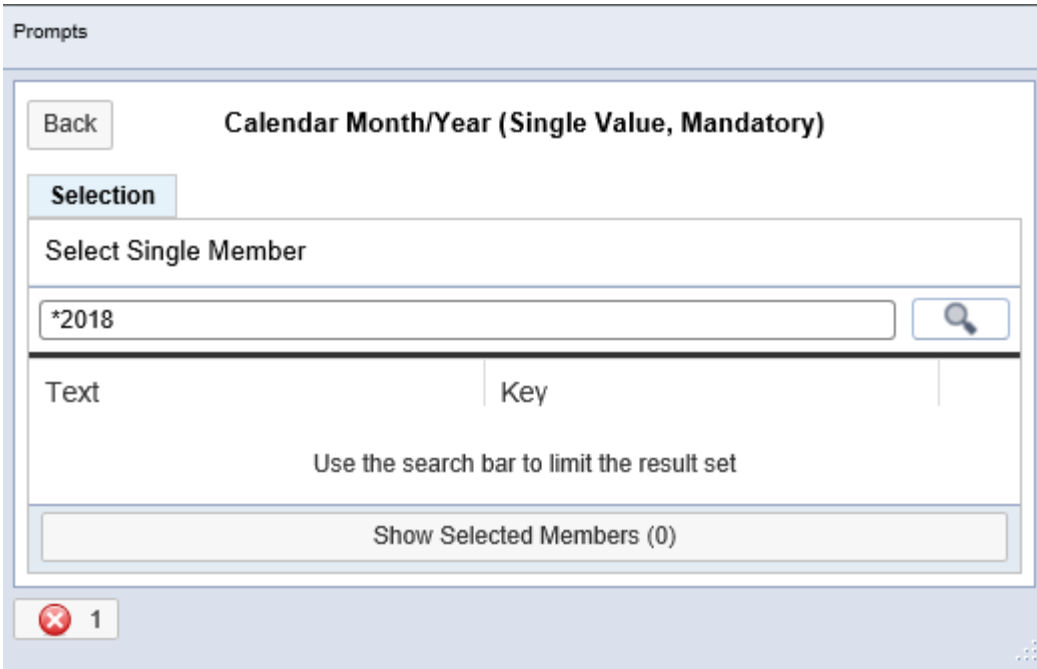
Text	Key	Selection
State of North Carolina	20000000	<input type="checkbox"/>
State of North Carolina	20000000	<input type="checkbox"/>
Council of State	20000002	<input type="checkbox"/>
Council of State	20000002	<input type="checkbox"/>
Secretary of State	20000063	<input type="checkbox"/>
State Auditor	20000064	<input type="checkbox"/>
State Treasurer	20000065	<input type="checkbox"/>
Public Instruction	20000066	<input type="checkbox"/>
Justice	20000067	<input checked="" type="checkbox"/>
Agriculture Consumer Service	20000068	<input type="checkbox"/>
Labor	20000069	<input type="checkbox"/>
Insurance	20000070	<input type="checkbox"/>

3. The first section is the Selection Search Bar. This area displays a search bar where the user can search for values.


**NOTE:** If no values are displayed in the Text section, the user must use the select members search field

4. The second section displays the Text for possible values. Click the  State of North Carolina to expand the values available for the prompt.

**NOTE:** If no values are displayed in the Text section, the user must use the select members search field



5. The third section displays the key numerical digits associated with the text.

6. The fourth section displays a toggle box.  This is where you can select a value by clicking into the box and it puts a check into the box.

7. The fifth section allows the user to display all members that were selected.

8. Once a value has been selected you must click the Back button.

Back

9. The prompts box will then display the selection.



Prompts

* Organizational Unit	Public Instruction >
* Calendar Month/Year (Single Value, Mandatory)	- >

1

OK

10. The user will continue to repeat the previous instructions until all mandatory prompts have a selected value.




Prompts

* Organizational Unit	Public Instruction >
* Calendar Month/Year (Single Value, Mandatory)	JAN 2018 >

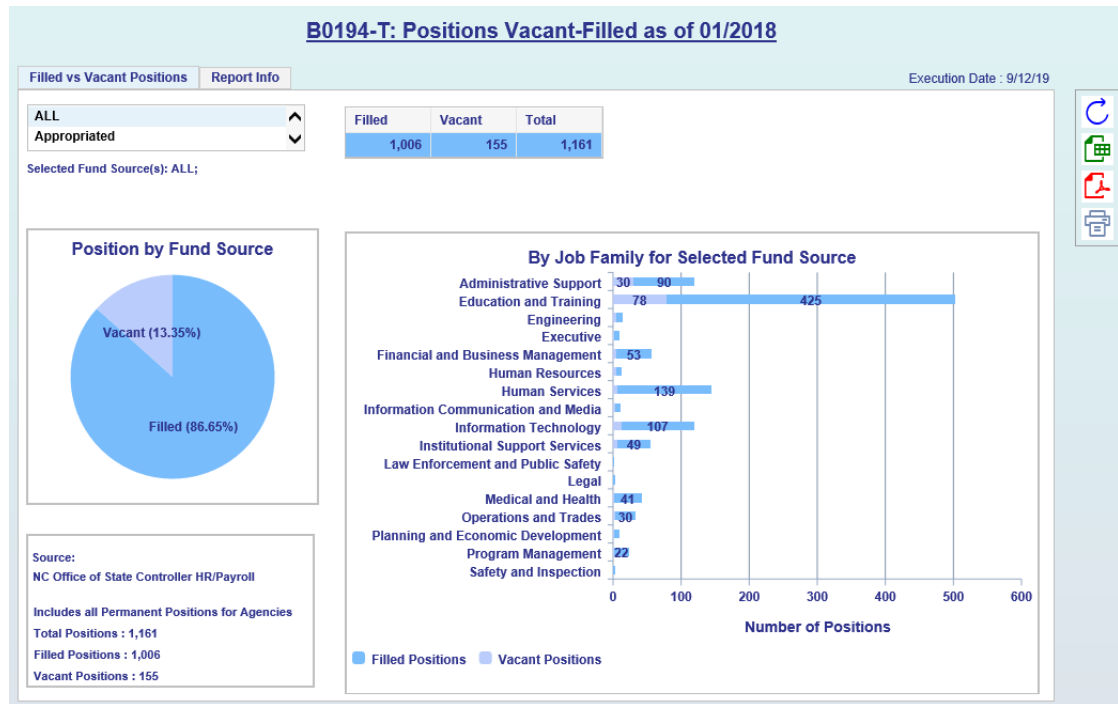
i 0

OK

**NOTE:** Once the user has satisfied all the mandatory prompts, the box in the bottom left corner changes from an x information box to a blue gray i.  0



11. When all mandatory prompts have a selected value, the OK button will become available for the user to press. Pressing the OK button will allow the user to generate the report.

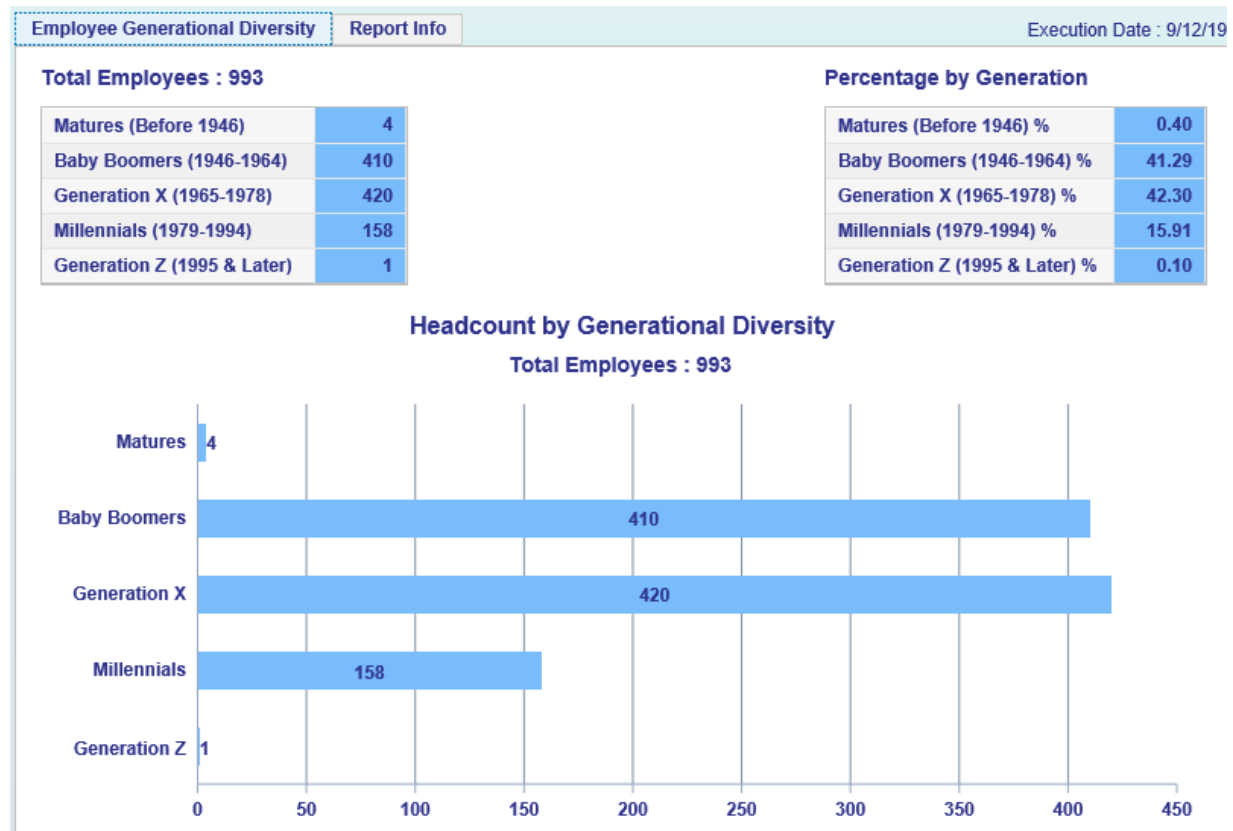


## Components of an Analysis Application Report

Analysis Application Reports have two tabs; the Dashboard and the Report Info.



The Dashboard tab shows charts, graphs, data tables and other visualizations related to the topic of the report. Contents will vary depending on the extent of the analysis done and the complexity of the data involved.



**NOTE:** Dashboard reports also can have selections within the report.

The Report Info tab displays the prompt selection.

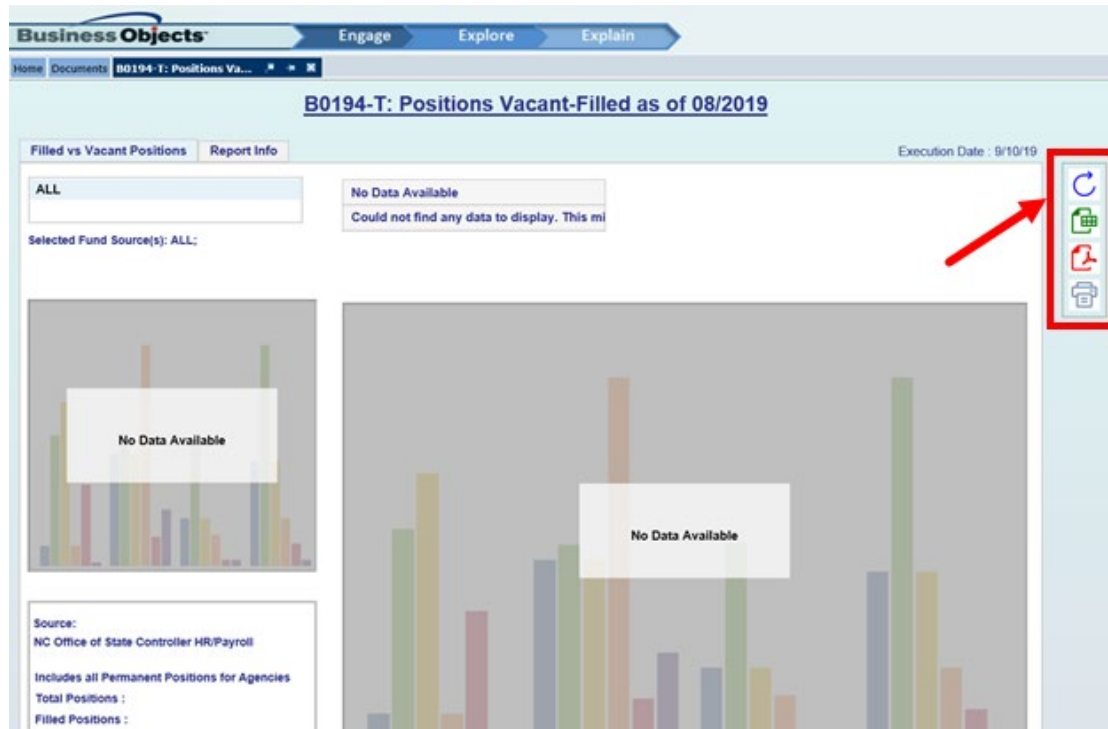
Employee Generational Diversity    **Report Info**    Execution Date : 9/12/19



**Prompt Input**

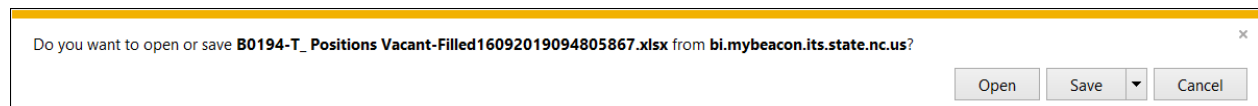
Organizational Unit	20000066 Public Instruction
CalMonth/Year	03/2018

## Toolbar Elements


Analysis Application Dashboard reports have a toolbar that allows for a few specific controls. This toolbar is in the far-right side once an Analysis Application report is generated.

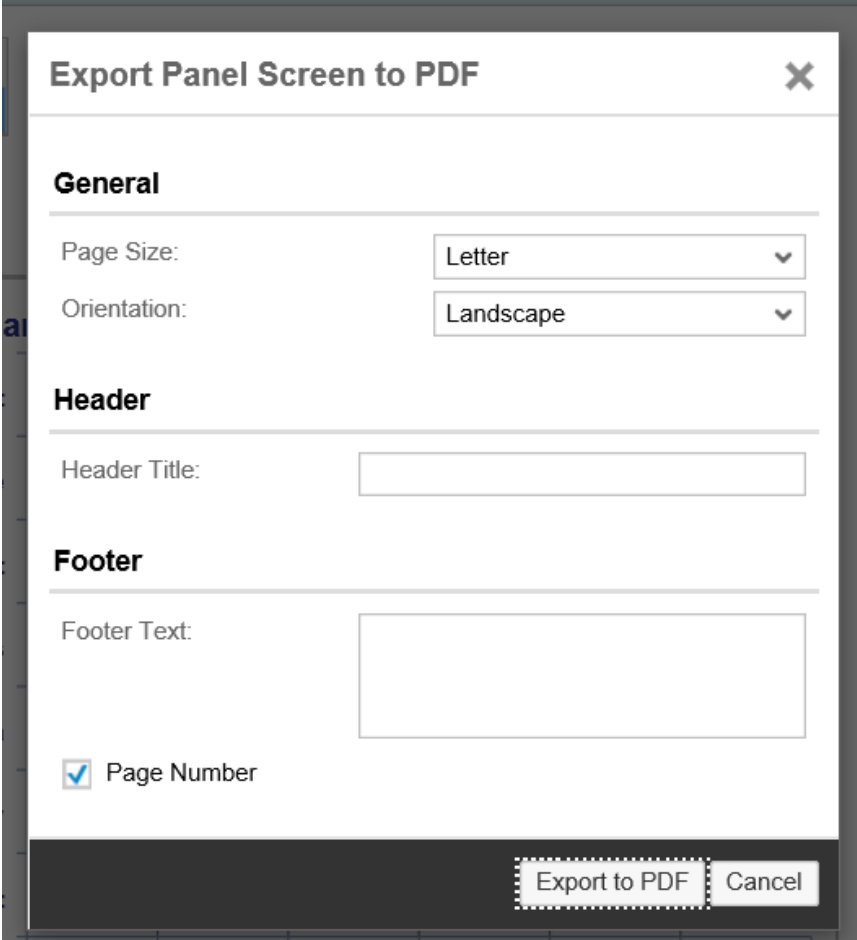


1. The first icon in the toolbar is Refresh . The prompt screen will appear to allow the user to select new or additional prompt values.
2. The second icon, Export to Excel , allows the user to export the data from the dashboard report to Excel. Once the user clicks the Export to Excel icon a Microsoft Excel download popup window will appear as below.



**NOTE:** If the Microsoft Excel Popup window doesn't appear, check your Excel download settings of your Microsoft product.

3. The third icon, Export to PDF , exports the data, as well as the dashboard charts, to a PDF. Once the user clicks the Export to PDF icon an Export Panel Screen to PDF appears for further user input. The user can then set the page size, edit or create a Header title, add a Footer text, and add a page numbers to the PDF. If the user continues and hits Export to PDF a Microsoft download popup window will appear as below.

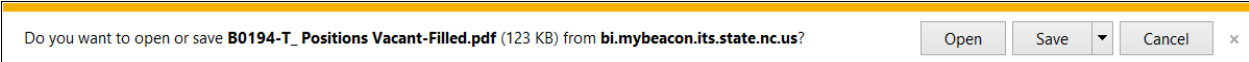


The dialog box is titled "Export Panel Screen to PDF" with a close button (X) in the top right corner. It contains three sections: "General", "Header", and "Footer".

- General**:
  - Page Size: Letter (dropdown menu)
  - Orientation: Landscape (dropdown menu)
- Header**:
  - Header Title: (text input field)
- Footer**:
  - Footer Text: (text input field)
  - ☒ Page Number


At the bottom right, there are two buttons: "Export to PDF" and "Cancel".

**NOTE:** If the popup window doesn't appear, check your Adobe PDF download settings of your Adobe product.



Do you want to open or save **B0194-T\_Positions Vacant-Filled.pdf** (123 KB) from **bi.mybeacon.its.state.nc.us?**

Buttons: Open, Save, Cancel, X

4. The fourth icon prints . The user may have to adjust their printer settings to suit their printer.

## ***SUMMARY***

In this lesson, you learned to:

- Understand the definition of Analysis Application
- Open and view Analysis Application reports
- Identify the components of Analysis Application

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## Lesson 4: Business Objects - Crystal Reports

### Objectives

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

### Definition of Crystal Reports

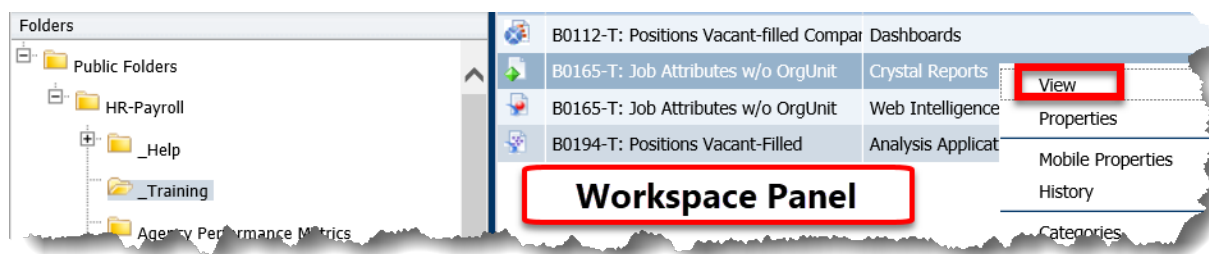
Crystal Reports are delivered reports with prompt selections for users to run and generate reports. These reports are pixel perfect with complex layouts which can be printed or exported to PDF format. Graphics, charts and other external objects can be embedded in a crystal report to provide professionally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

### To Open and View a Crystal Report

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


**NOTE:** The report also can be in the Home tab, My Recently Viewed Documents.

1. Double-click on the B0165-T Crystal report title in the Workspace Panel or right click on the report title and select View, to open the report.



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

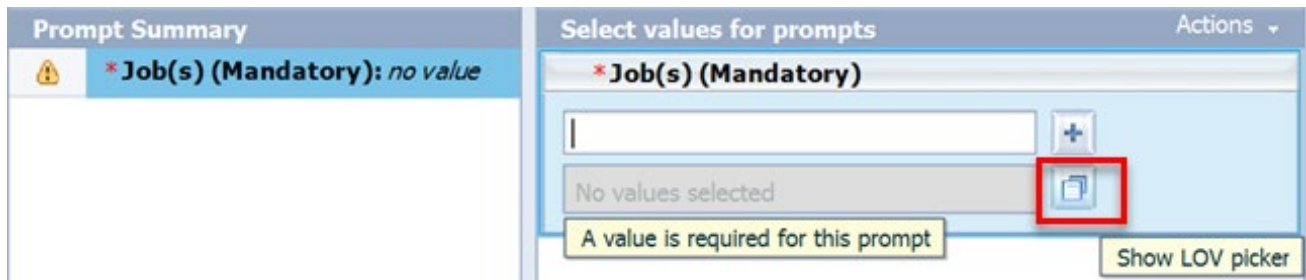
The screenshot shows the 'Prompts' dialog box. The 'Prompt Summary' pane on the left lists '\* Job(s) (Mandatory): no value'. The 'Select values for prompts' pane on the right shows the same entry with an input field and a 'No values selected' button. A legend at the bottom indicates that asterisks denote required prompts.

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

The 'Prompt Summary' section displays a list of prompts. The first two are required prompts marked with an asterisk. The following three prompts are optional, indicated by a blue arrow icon, and are enclosed in a red box for emphasis.





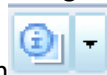
3. Click the **Show LOV picker** icon -  to select values.



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

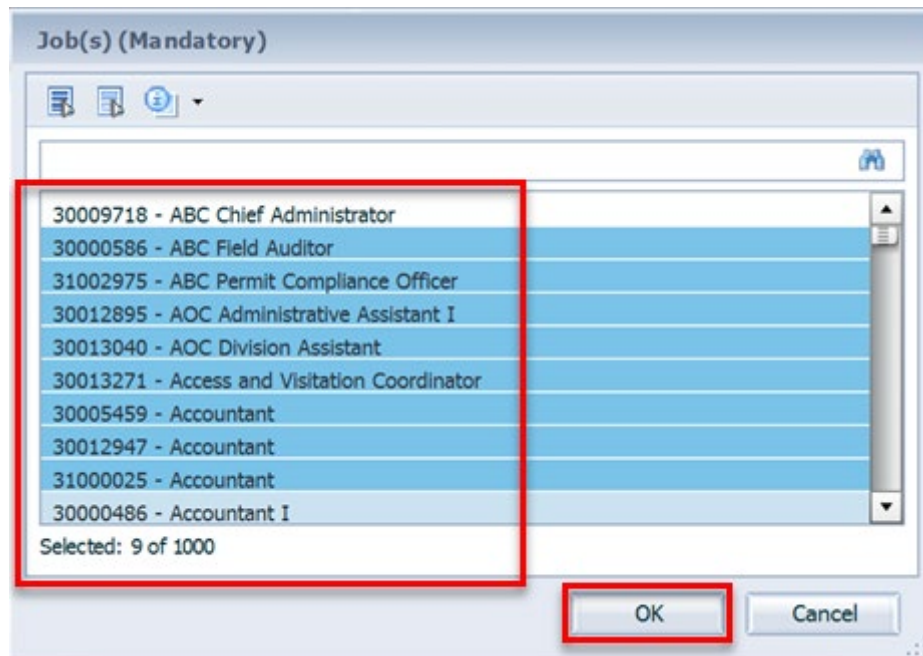


4. The Job(s) (Mandatory) selection box will display for you to select values for prompts.

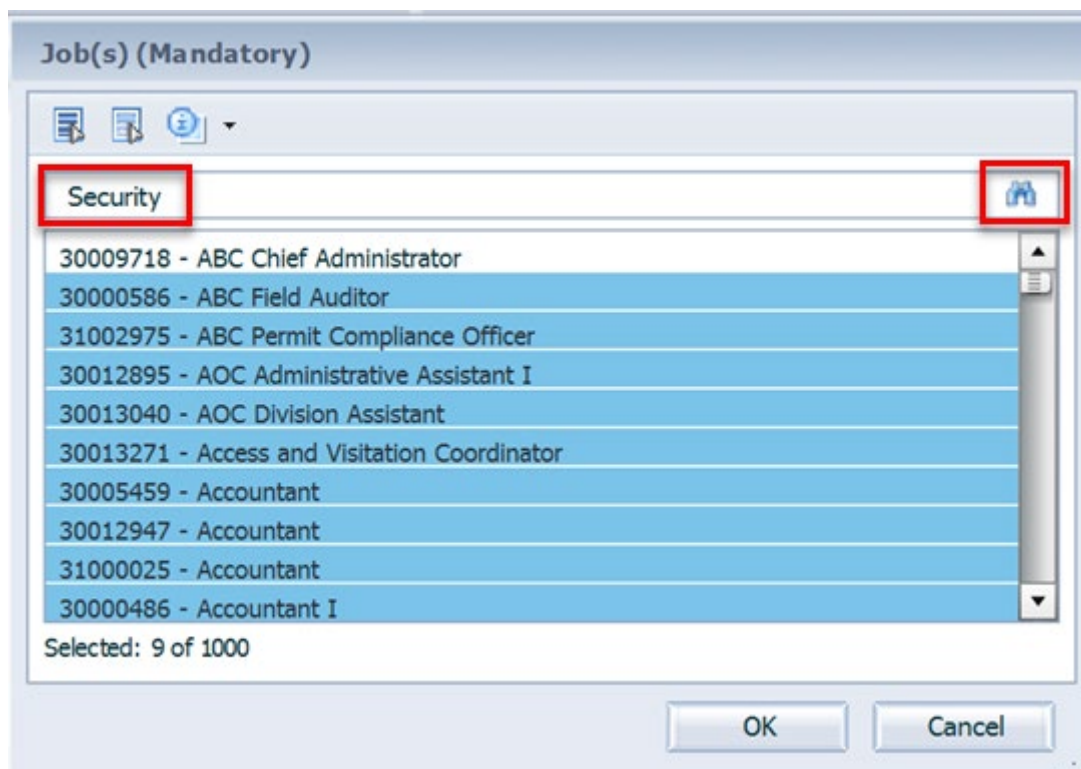
**NOTE:** Select all values by clicking on the Select All Values icon . Also, you can deselect all values by clicking on the Select no values icon . Click on the Show all/selected values icon  to show only the selected values.

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

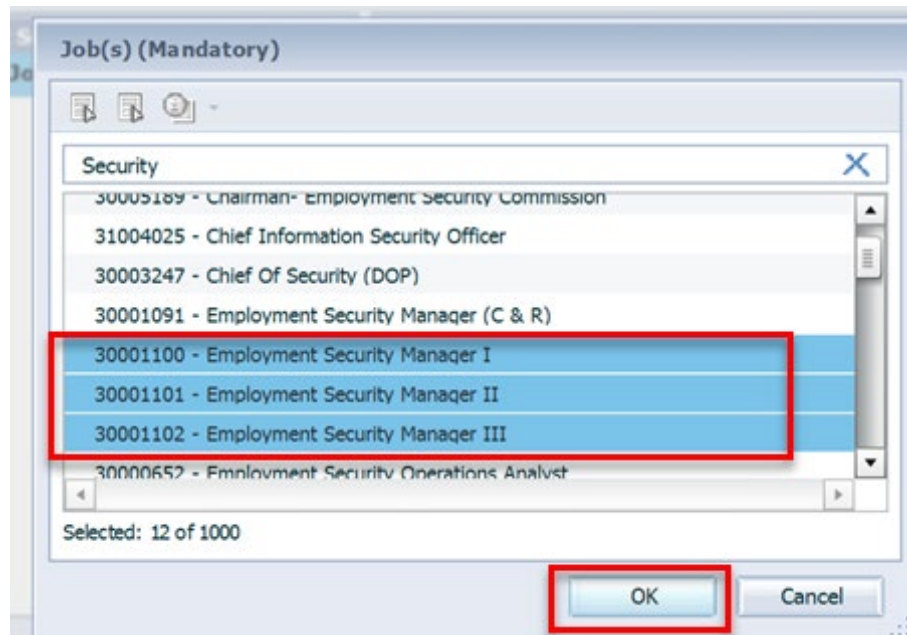
5. Now that you have selected your value(s), click OK.



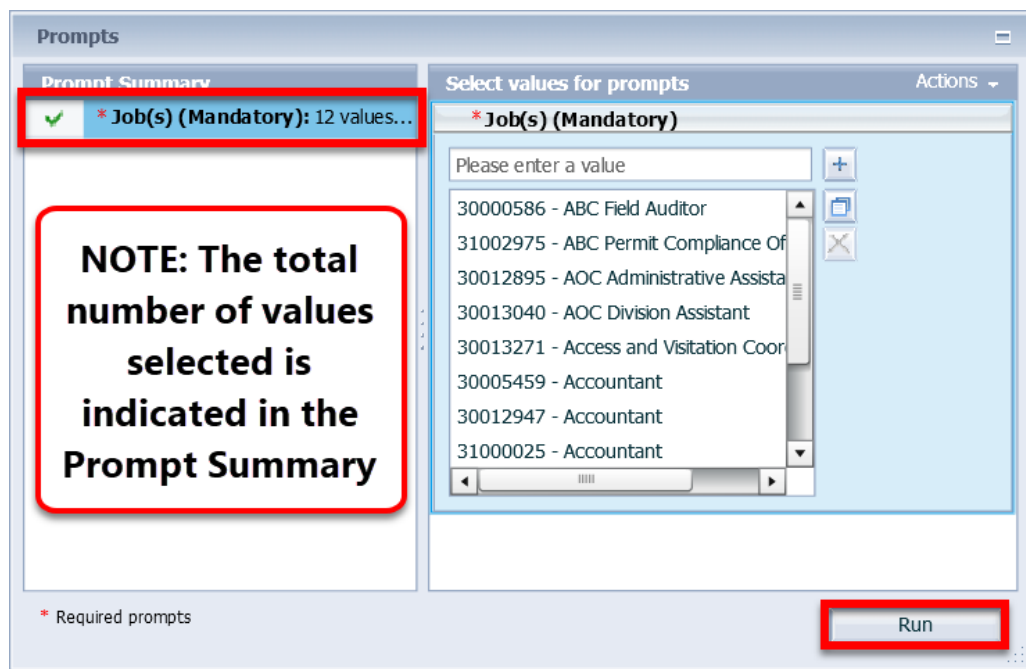
**NOTE:** Also, you can enter a search value in the Search field box to narrow the list from which to select. You can search using words or numbers. You do not need to use the asterisk (\*) wildcard in the search field. Once you have entered the value, click on the binocular search icon to execute the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



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



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



**NOTE:** The warning icon is now a green checkmark  indicating that the mandatory prompt is set.

7. The report will display in the Workspace.

## B0165-T: Job Attributes w/o OrgUnit as of JUL 2017

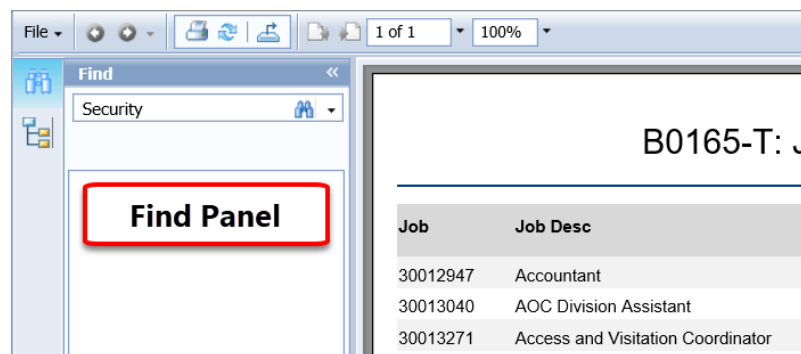
Execution Date:  
7/25/17

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average
30001100	Employment Security Manager I	Graded	Annual Salaries	GR73	22	44,347	74,431	58,346	56,
30001101	Employment Security Manager II	Graded	Annual Salaries	GR75	36	48,195	81,392	63,699	59,
30001102	Employment Security Manager III	Graded	Annual Salaries	GR77	12	52,551	89,008	69,629	66,
30012947	Accountant	Graded	Judicial	JB20	1	48,828	78,348	63,588	57,
30013040	AOC Division Assistant	Graded	Judicial	JB15	2	37,658	56,682	47,170	43,
30013271	Access and Visitation Coordinator	Flat Rate	Judicial	30013271	5	37,942	59,747	0	38,
31000025	Accountant	Banded	Career Banding	31000025	283	37,012	99,263	59,342	62,

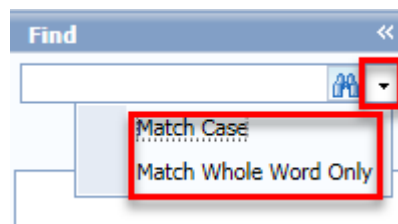
**NOTE:** The Execution Date is in the top right corner of the report to show the date the report was generated.

## Navigation Panel

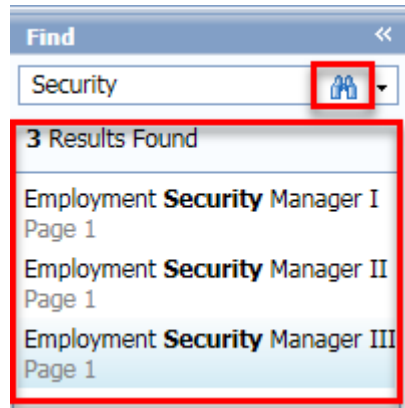
1. **Find Option** - Click on the Find icon to open the Find panel. This allows a search for titles, keywords, and/or measures within the report. The search results will be listed in the Find panel.
  - A. Type the title, keyword, and/or measures in the search field.



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

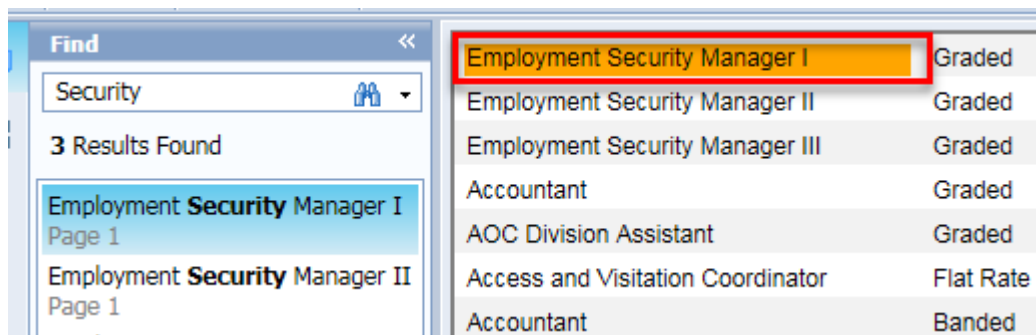


- B. Click on the binoculars to display the search results.




- C. Click on the result found to navigate to the selected result.

**NOTE:** The selected result is highlighted in the report.



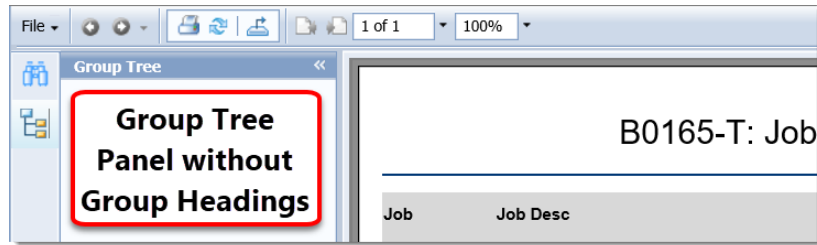
- D. Click on the double arrows in the top right corner of the panel to minimize the Find panel. Your search will remain in the search panel while the report is open.



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

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

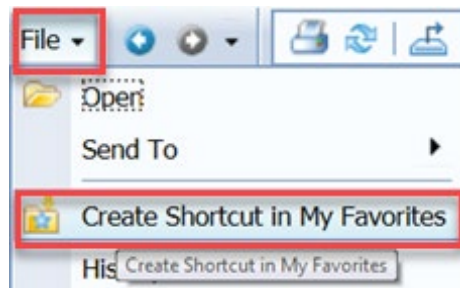
- A. Selected Crystal Report without group headings - shown below:



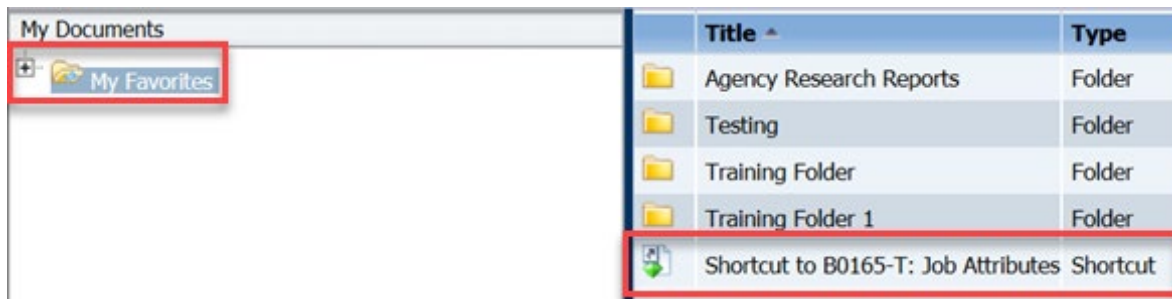
## Toolbar Elements



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



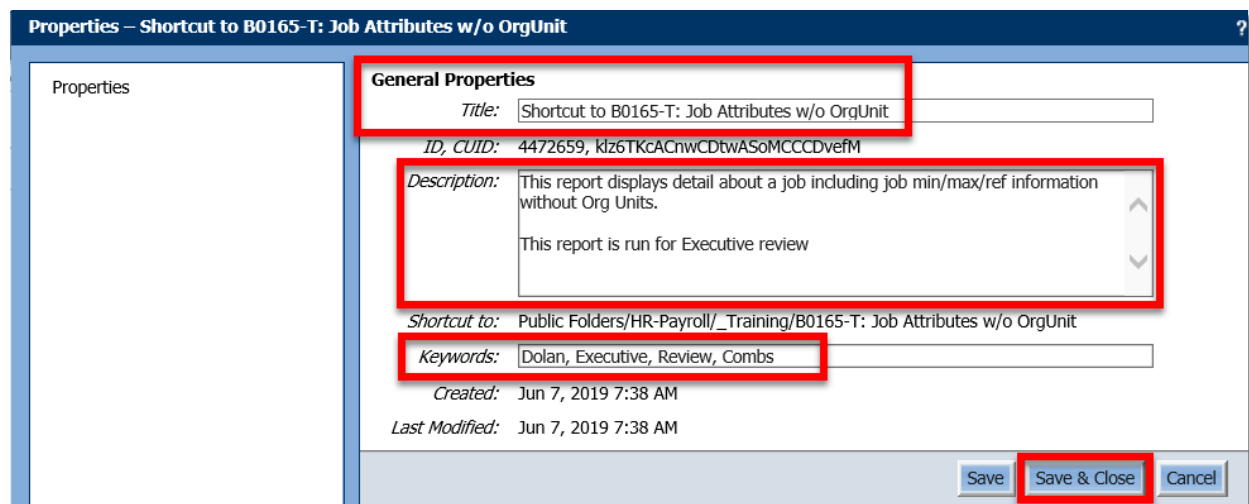
B. Then you will see the report shortcut in your My Favorites folder:






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

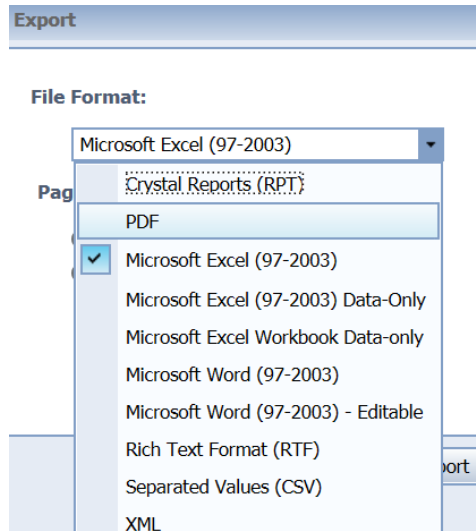


C. Once the title, description, and/or keywords have been changed, click on the Save & Close button located in the bottom right corner.

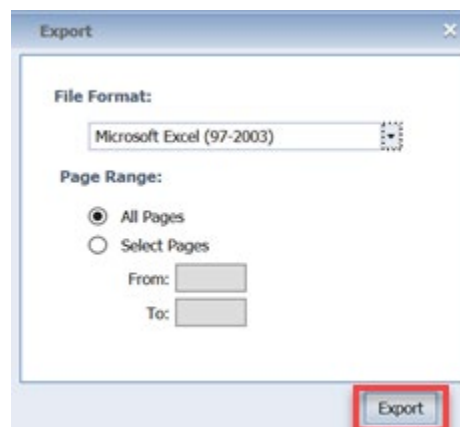


2. **Print the Report** -  DO NOT USE - Report must be exported to a PDF file to print (see #4 Export the Report).
3. **Refresh Data** -  The data in a Crystal report can be refreshed on demand by clicking on the Refresh Report icon on the toolbar. The Prompts box will display. If you want to refresh using the original prompt values selected, click Run. However, you can select new or additional prompt values at this time.

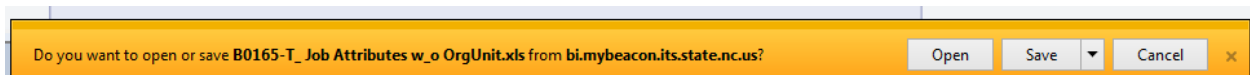
4. **Export the Report** -  the report can be exported to a variety of file formats by clicking on the Export icon and selecting the format in which you want to export the report.



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



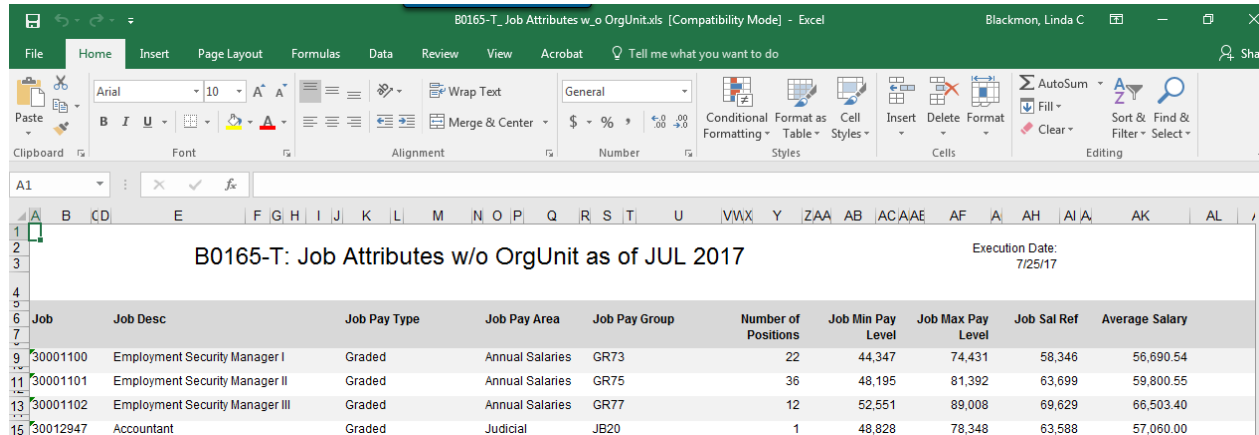
- B. Once Export is clicked, the following box displays for you to determine if you want to open or save the exported file. The exported file will be saved on your computer and not within BOBJ.






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

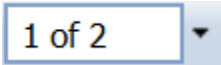
### C. File Exported to Excel



The screenshot shows an Excel spreadsheet titled "B0165-T: Job Attributes w/o OrgUnit.xls [Compatibility Mode] - Excel". The spreadsheet displays a table of job attributes as of July 2017. The table has columns for Job, Job Desc, Job Pay Type, Job Pay Area, Job Pay Group, Number of Positions, Job Min Pay Level, Job Max Pay Level, Job Sal Ref, and Average Salary. The data includes three rows of job information.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary
30001100	Employment Security Manager I	Graded	Annual Salaries	GR73	22	44,347	74,431	58,346	56,690.54
30001101	Employment Security Manager II	Graded	Annual Salaries	GR75	36	48,195	81,392	63,699	59,800.55
30001102	Employment Security Manager III	Graded	Annual Salaries	GR77	12	52,551	89,008	69,629	66,503.40
30012947	Accountant	Graded	Judicial	JB20	1	48,828	78,348	63,588	57,060.00

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

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

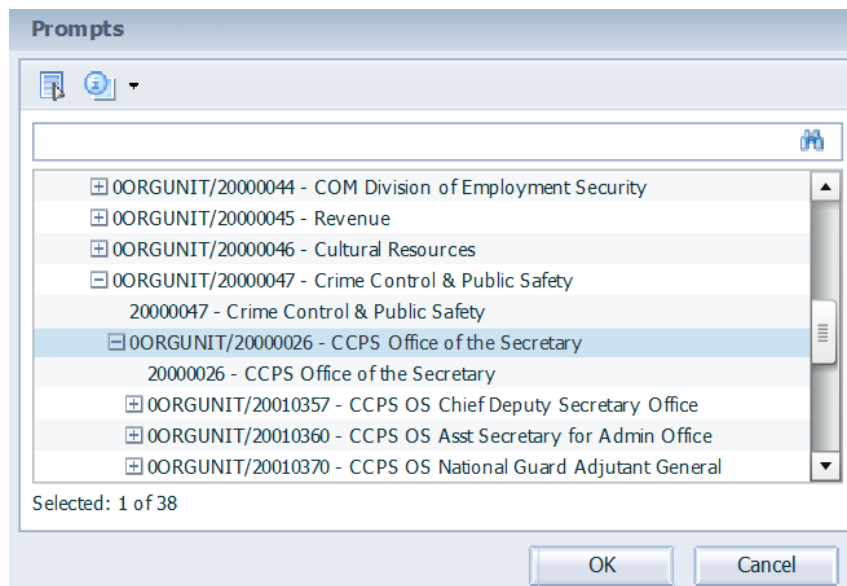
7. **Zoom factor** -  allows you to select zoom factor for the report.

## Prompt Selections for Organizational Units and Dates

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

### *Selecting Organizational Unit(s) on Prompts Box*

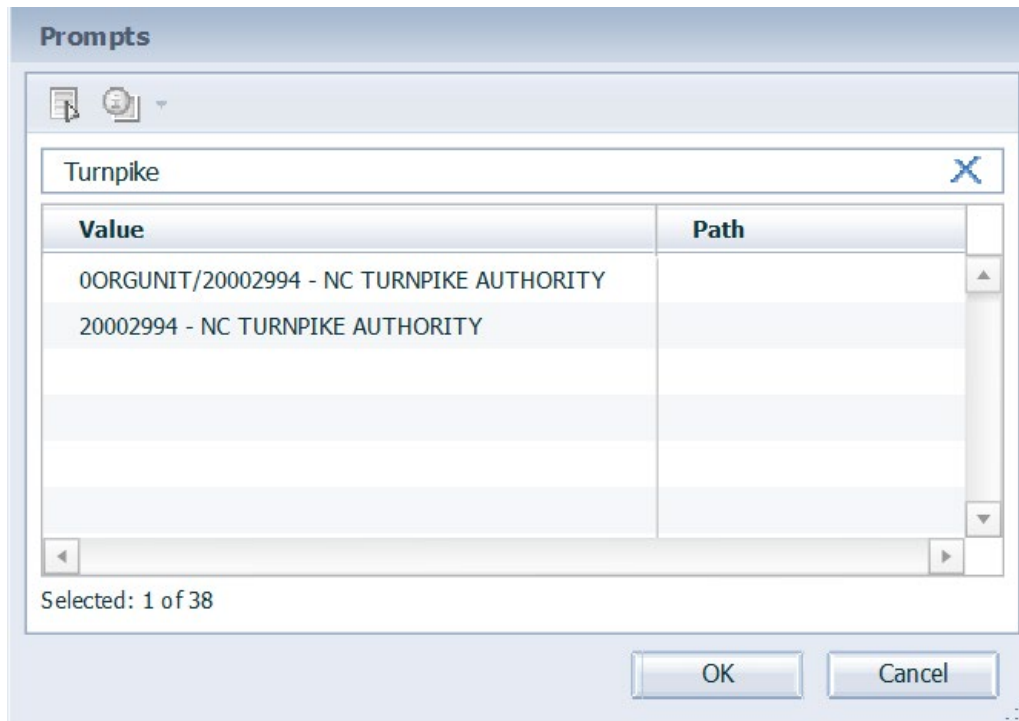
When selecting Organizational Unit values on the Prompts box, click on the plus sign (+) to drill down to specific organizational units. If you select an Organizational Unit with the plus sign (+) in front of it, then you are selecting that Organizational Unit and every Organizational Unit underneath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



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



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

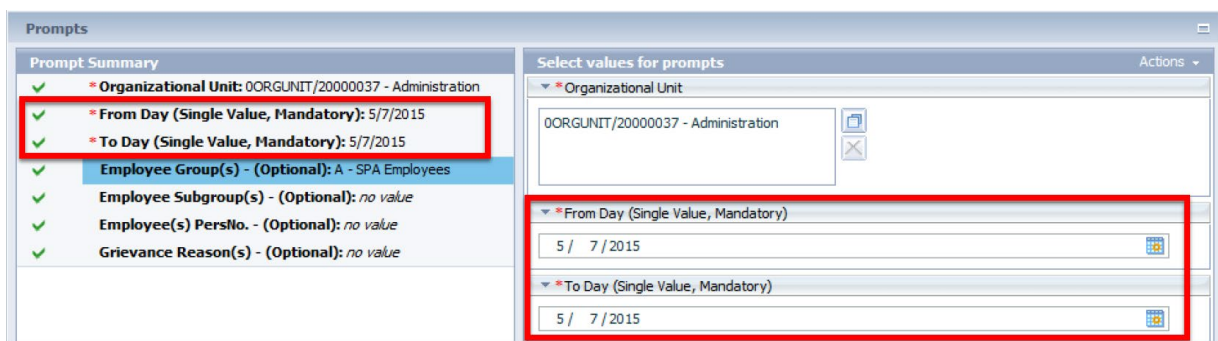


### Selecting Dates on Prompts Box

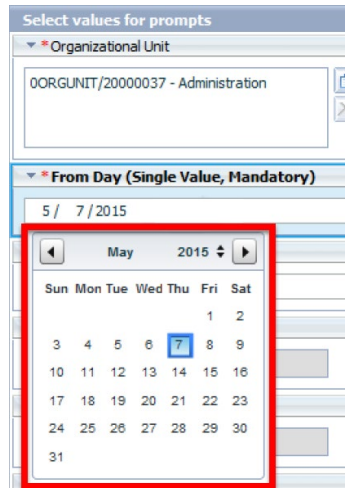
When selecting dates on the Prompts box, you have the option to select From Day/To Day values, Calendar Month/Year values, or a range of dates.

#### 1. Selecting From Day/To Day Values

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



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

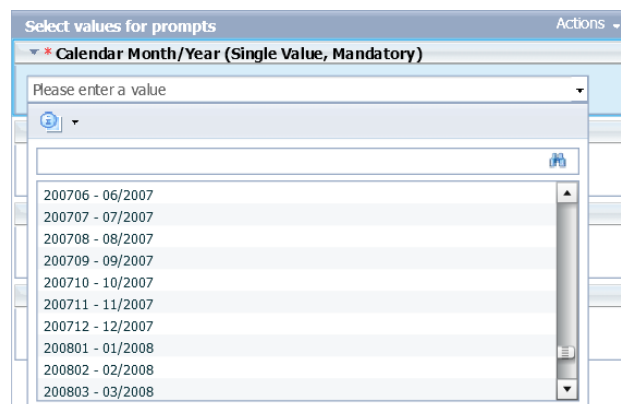


**NOTE:** You can enter a date directly in the prompt rather than clicking on the month icon.

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

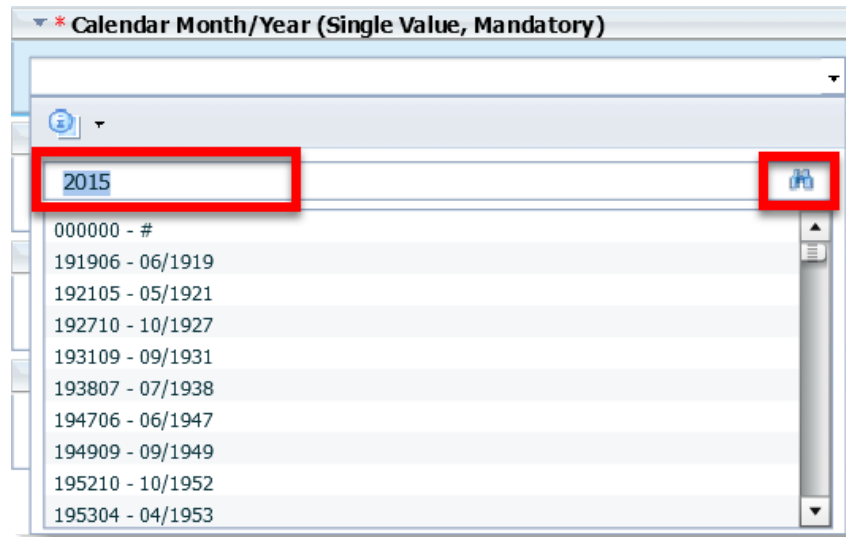
- A. Click in the drop-down arrow beside the Calendar Month/Year value field option. This will bring up a list of dates available for selection. Double-click the date for which you need to generate a report, and it will populate in the value field.

**NOTE:** You can enter a Month/Year directly in the prompt rather than clicking on the drop-down arrow beside the Calendar Month/Year value field option.

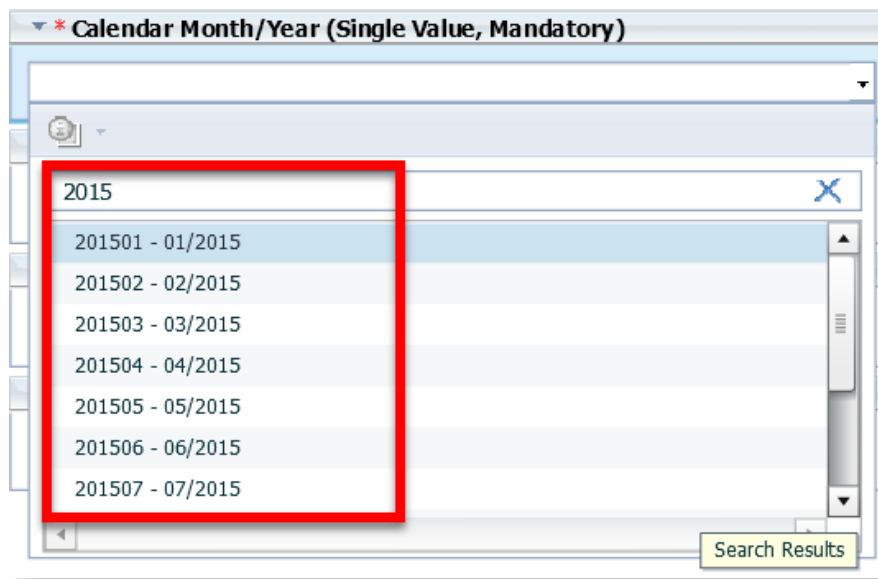


**NOTE:** Also, you can enter a search value in the Search field box to narrow the date list to select. You do not need to use the asterisk (\*) wildcard in the search field.

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



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



## SUMMARY

In this lesson, you learned to:

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

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# Lesson 5: Business Objects - Web Intelligence

## Reading Mode

### Objectives

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

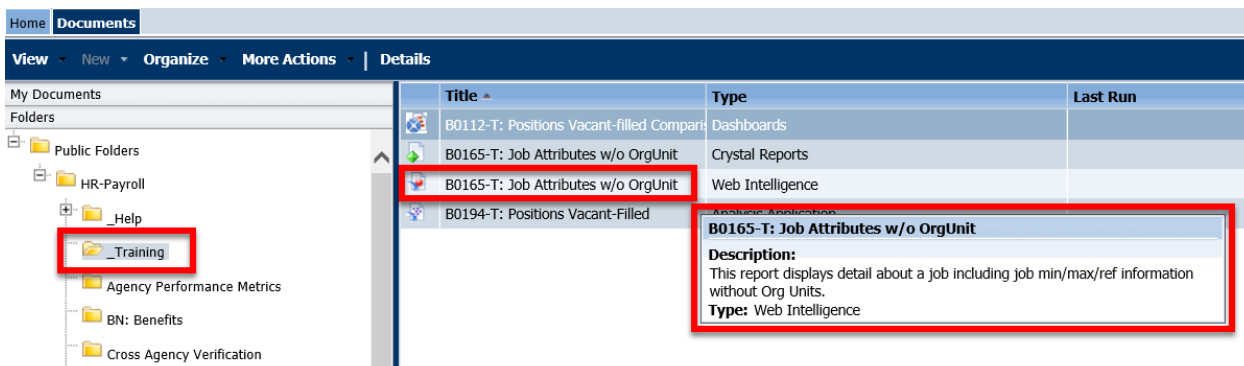
### Definition of Web Intelligence

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

### To Open and View a Web Intelligence Report

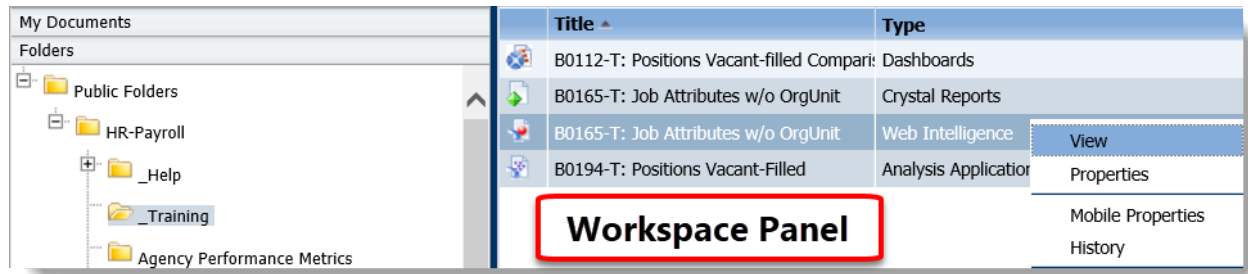
Once you log into the Integrated HR-Payroll System and select the Business Objects tab, the Launch Pad will open providing access to the reports and information housed in BOBJ. Click on the appropriate folder (My Documents or Public Folders) to locate the report in the workspace panel which you would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

**NOTE:** The report may be in the Home tab, My Recently Viewed Documents, if it was in the last ten reports opened.

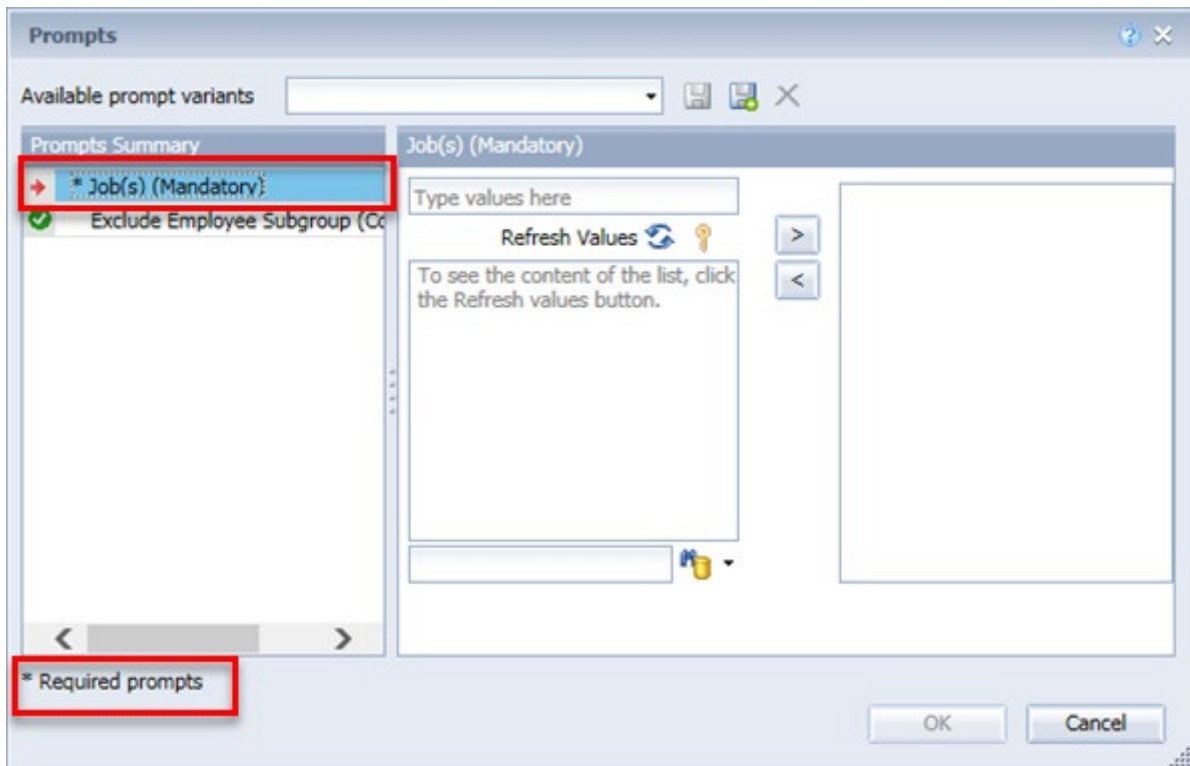


Hovering over a report in the list or single clicking the report will display an information box showing the Description and Type of the Report.

1. Double-click on the report title in the Workspace Panel. Also, you can right click on the report title and select View.



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





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

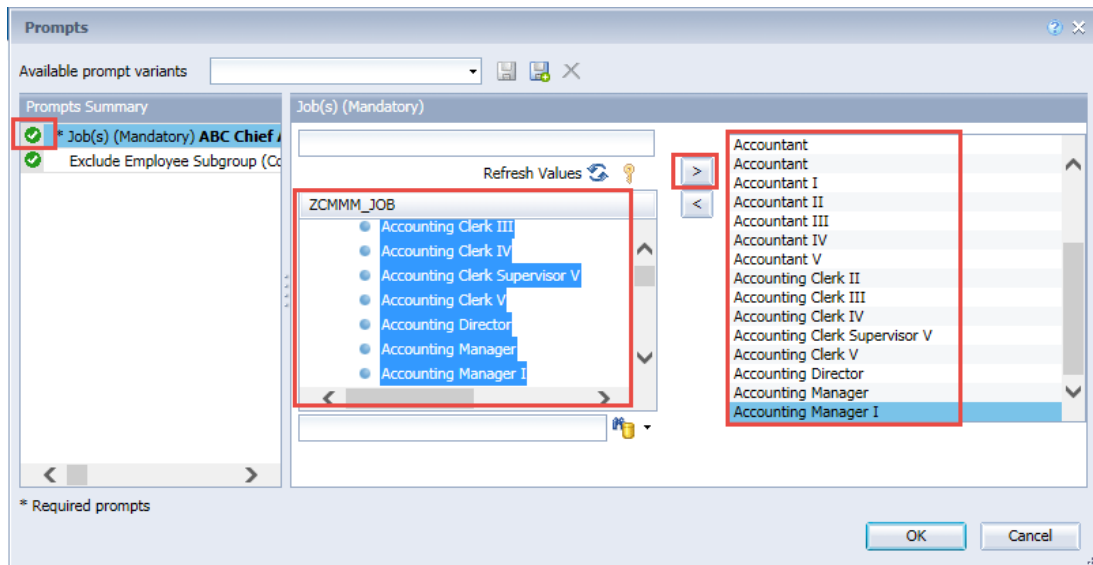
Highlight the value in the Prompts Summary field and click on the Refresh Values option to load the content for selection. Refresh Values

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

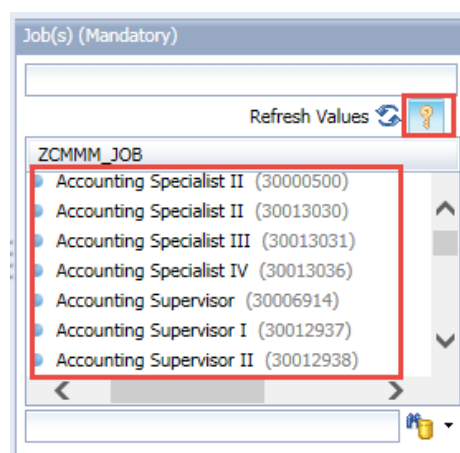


- Once the values are loaded in the content area for selection, single click on the selected value, and click the right arrow to add to the selected prompt window. Notice that once the value(s) are selected, the Red Arrow  beside the mandatory field becomes a Green Check .

**PROCESS TIP:** Click and hold Shift or Ctrl on your keyboard, and click on the selected values to highlight multiple values before clicking on the right arrow to add to the selected prompt window.



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



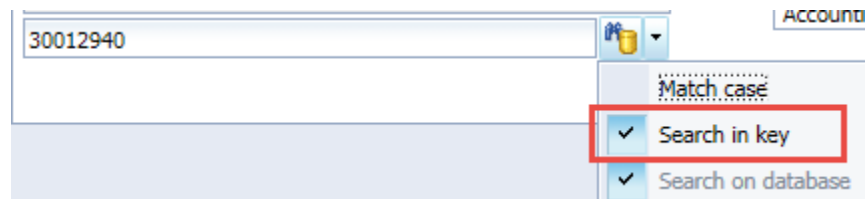
Also, you can enter a search value in the Search field box to narrow the list from which to select. Once you have entered the value, click on the binocular search icon to execute the search.

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



\*Security\*

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

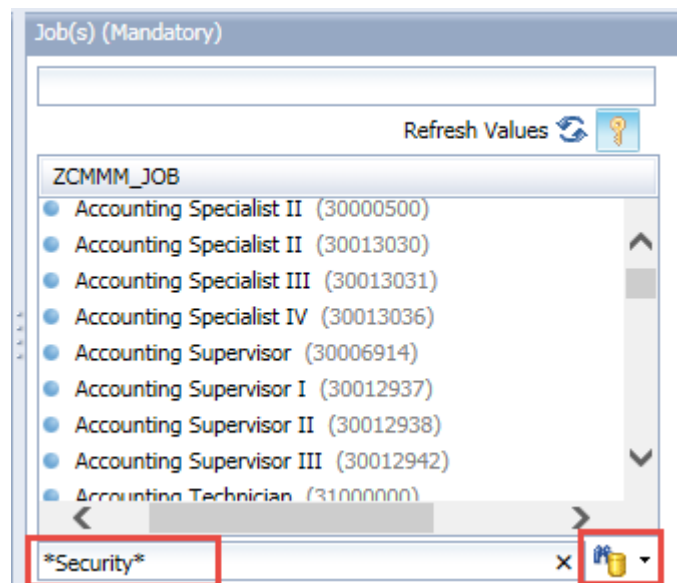


30012940

Match case

☒ Search in key

☒ Search on database




Job(s) (Mandatory)

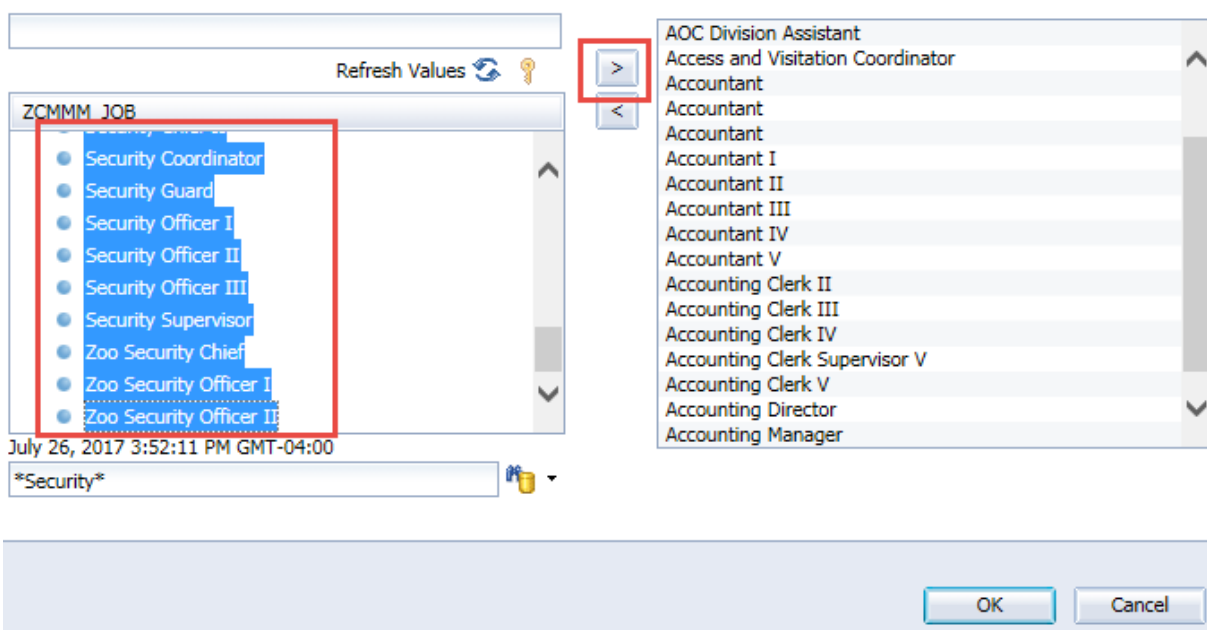
Refresh Values



ZCMMM\_JOB

- Accounting Specialist II (30000500)
- Accounting Specialist II (30013030)
- Accounting Specialist III (30013031)
- Accounting Specialist IV (30013036)
- Accounting Supervisor (30006914)
- Accounting Supervisor I (30012937)
- Accounting Supervisor II (30012938)
- Accounting Supervisor III (30012942)
- Accounting Technician (31000000)

\*Security\*

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



Refresh Values  


ZCMMM\_JOB

- Security Coordinator
- Security Guard
- Security Officer I
- Security Officer II
- Security Officer III
- Security Supervisor
- Zoo Security Chief
- Zoo Security Officer I
- Zoo Security Officer II

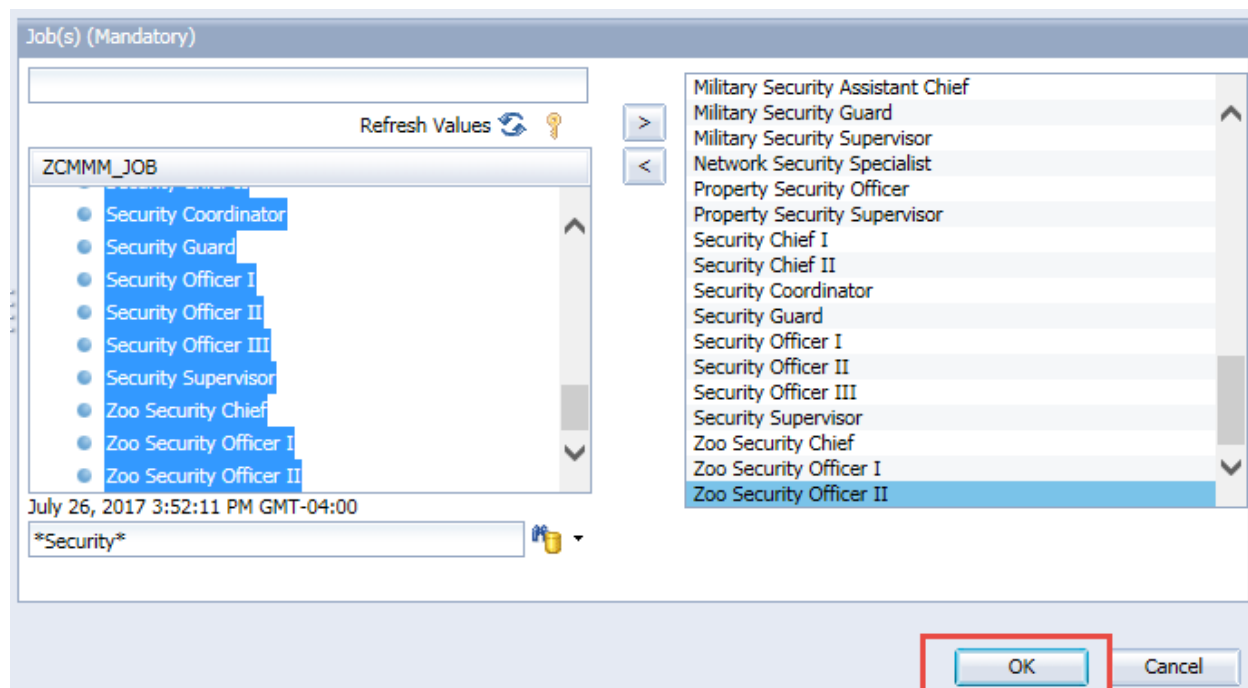
July 26, 2017 3:52:11 PM GMT-04:00

\*Security\*



OK Cancel

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

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



Job(s) (Mandatory)

Refresh Values  

ZCMMM\_JOB

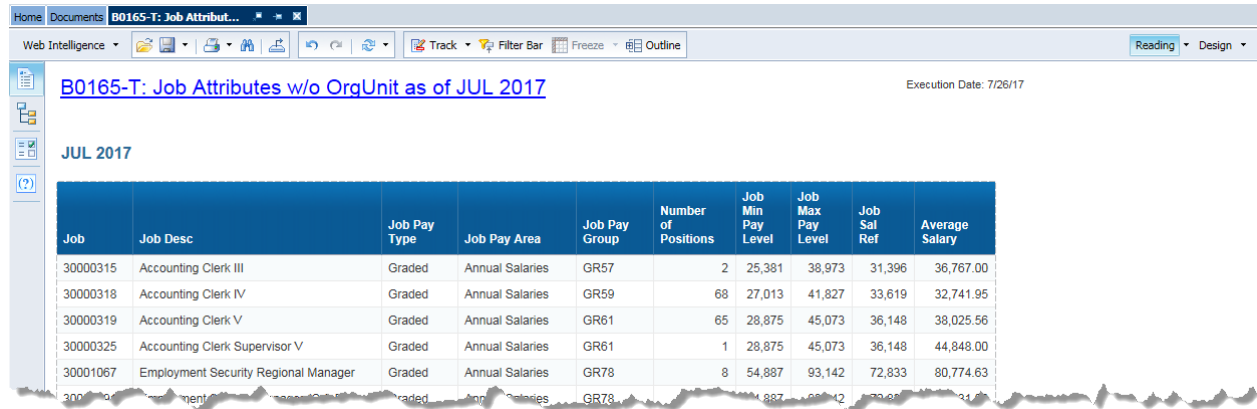
- Security Coordinator
- Security Guard
- Security Officer I
- Security Officer II
- Security Officer III
- Security Supervisor
- Zoo Security Chief
- Zoo Security Officer I
- Zoo Security Officer II

July 26, 2017 3:52:11 PM GMT-04:00

\*Security\*

OK Cancel

6. The report will load and appear in your work space.



**B0165-T: Job Attributes w/o OrgUnit as of JUL 2017**

Execution Date: 7/26/17

**JUL 2017**

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary
30000315	Accounting Clerk III	Graded	Annual Salaries	GR57	2	25,381	38,973	31,396	36,767.00
30000318	Accounting Clerk IV	Graded	Annual Salaries	GR59	68	27,013	41,827	33,619	32,741.95
30000319	Accounting Clerk V	Graded	Annual Salaries	GR61	65	28,875	45,073	36,148	38,025.56
30000325	Accounting Clerk Supervisor V	Graded	Annual Salaries	GR61	1	28,875	45,073	36,148	44,848.00
30001067	Employment Security Regional Manager	Graded	Annual Salaries	GR78	8	54,887	93,142	72,833	80,774.63

**NOTE:** Effective June 2019, all WEBI reports were updated to include a new feature where the report description will launch when clicking on the title of the report. The report description will open in a separate tab.



## Web Intelligence Modes of Review

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

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

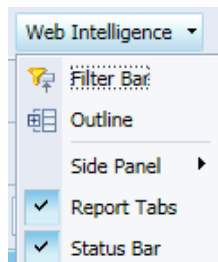
1. **Reading Mode** - simplifies the Web intelligence interface, providing only those functions associated with exploring and analyzing reports. Special functions associated with reading mode include the Filter Bar and Freeze mode.
2. **Design Mode** - Design mode expands the Web Intelligence interface.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


## Reading Mode

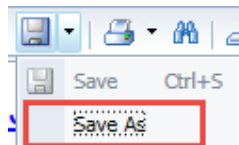
### Toolbar Menu



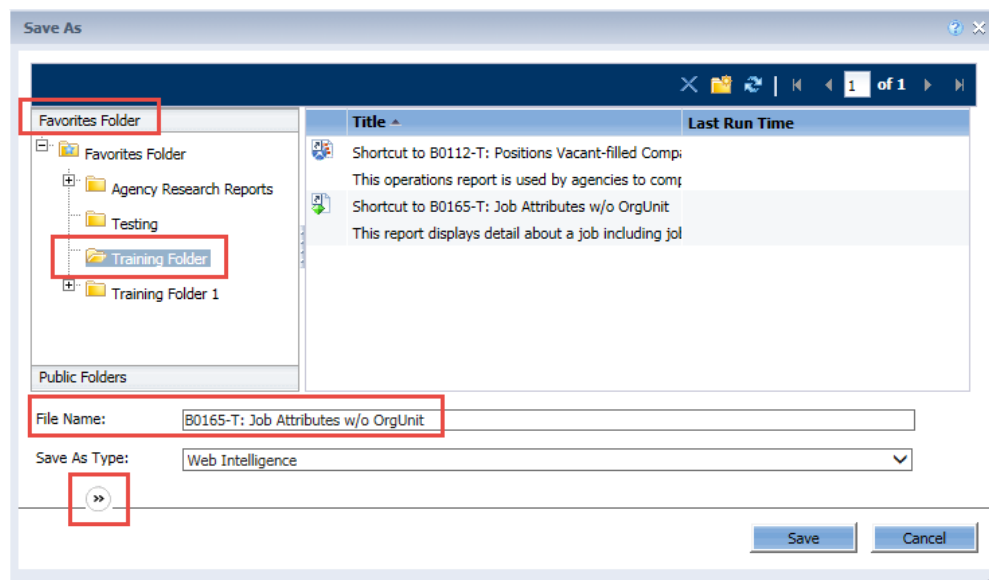
- **Web Intelligence** - drop down menu allows you to view or hide the various menu bars such as the Filter Bar, Outline, Side Panels, Report Tabs, and/or Status Bar.



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



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



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

**Save As**

1 of 1

Title	Last Run Time
Shortcut to B0112-T: Positions Vacant-filled Comparison as of Mar	
This operations report is used by agencies to compare	
Shortcut to B0165-T: Job Attributes w/o OrgUnit	
This report displays detail about a job including job	

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

Save As Type: Web Intelligence

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

Keywords: Job, Job Details, Job Attributes, training

Assign Category:

Save Cancel


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

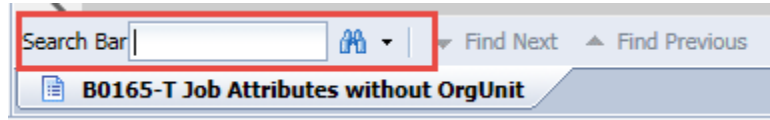
My Documents	
My Favorites	
Agency Research Reports	
Testing	
Training Folder	

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

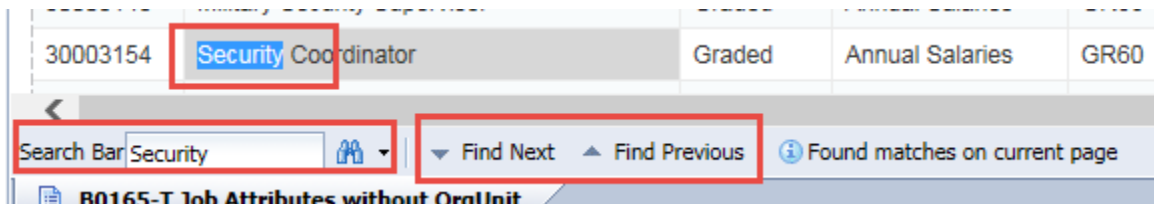
**NOTE:** If updates are made to the report located in the Public Folders, your saved report will not be updated.

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

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

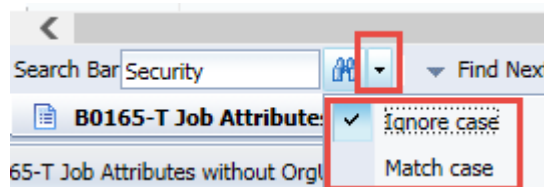



2. Type the word in the Search field and click the binocular icon. The result(s) will be highlighted in the report.

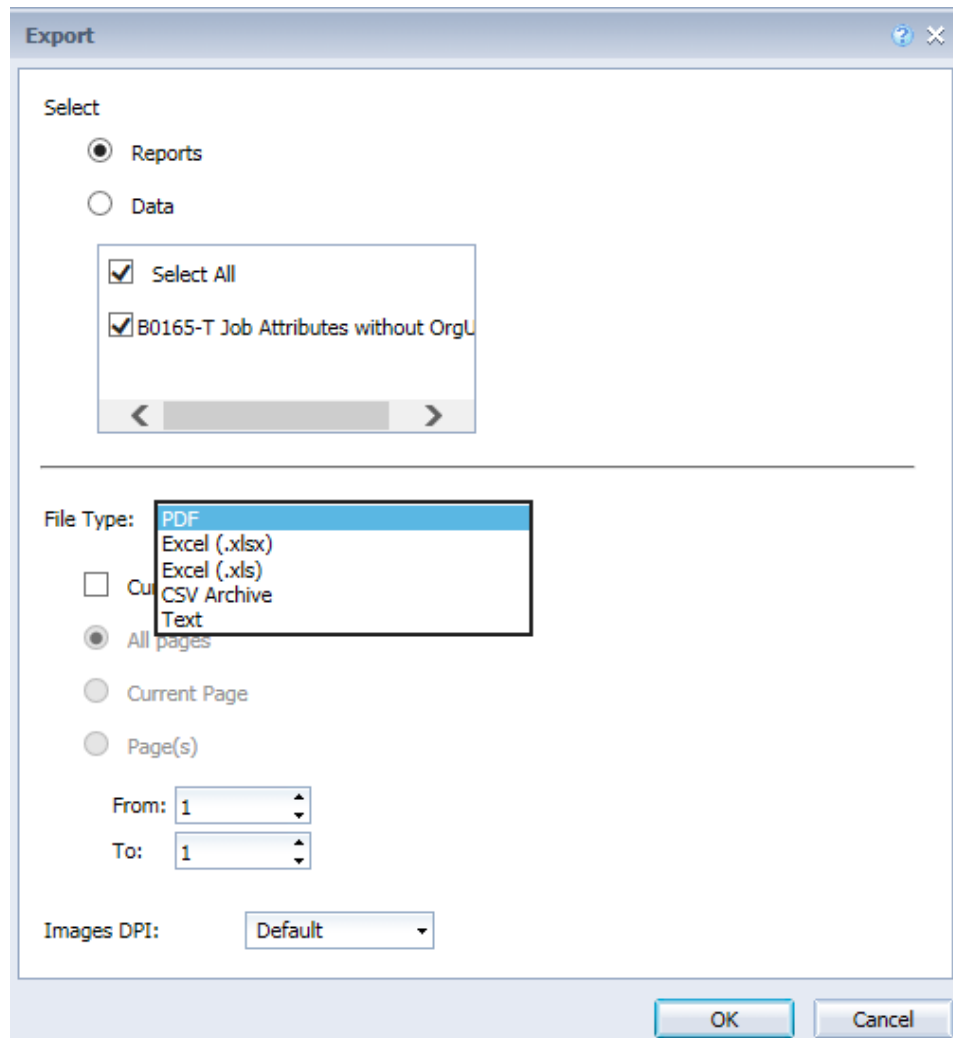


You can click on Find Next or Find Previous to see your search results on the page(s).

Click on the arrow to the right of the binocular to change the output results of the Find feature (for example, Ignore case or Match case).



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





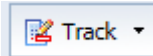
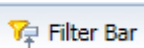
1. Once you select the format, the following box displays for you to determine if you want to open or save the exported report/document. The exported report/document will be saved on your computer and not within BOBJ.

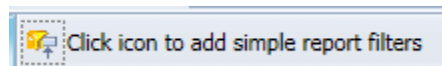
Do you want to open or save Training\_B0165-T\_Job\_Attributes\_w\_o\_OrgUnit.xlsx (8.83 KB) from bi.mybeacon.its.state.nc.us?

Open Save Cancel

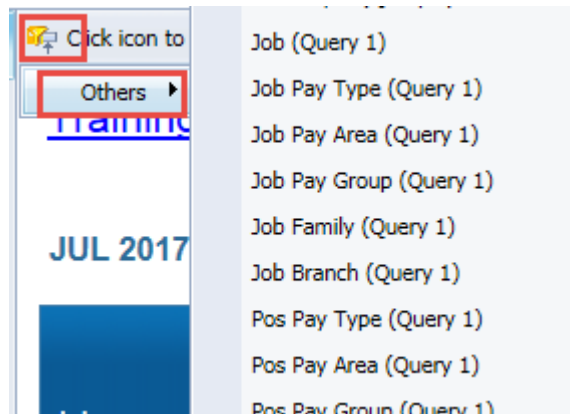
**NOTE:** The File Download options may display differently depending on the browser you are using. If you use IE10, the download will appear in the bottom of the browser window with the option available to open or save.



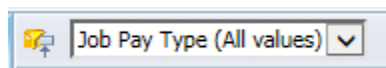
- **Undo and Redo**  - Reverses the previous action or Reverses the undo action.
- **Refresh**  - The data in the report can be refreshed on demand by clicking on the Refresh icon on the toolbar. The Prompts box will appear, and you have the opportunity to select new values when the report is refreshed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



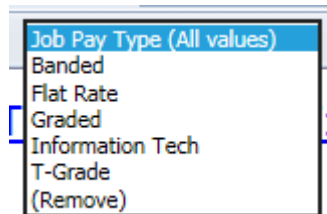
2. Click on the key icon and then click **Others** to see the list of available data elements.



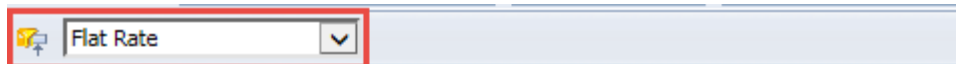
3. Select the data element you want to filter. The data element selected will appear in the filter bar as an item that can be used for filtering.



4. Click on the drop-down box and select the data value to apply the filter.



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

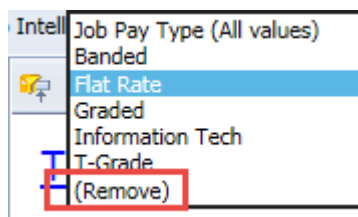


[Training B0165-T: Job Attributes w/o OrgUnit as o](#)

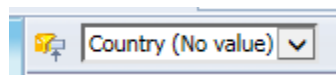
JUL 2017

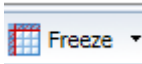
Job	Job Desc	Job Pay Type	Job Pay A
30005189	Chairman- Employment Security Commission	Flat Rate	Flat Rate
30013271	Access and Visitation Coordinator	Flat Rate	Judicial

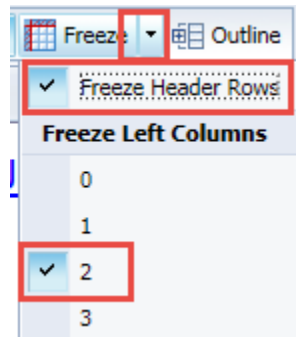
6. To remove the filter from the bar, click on the drop-down box and click (Remove).



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



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

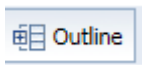


- To unfreeze the left columns, clear the Freeze Left Column check box or select 0.

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

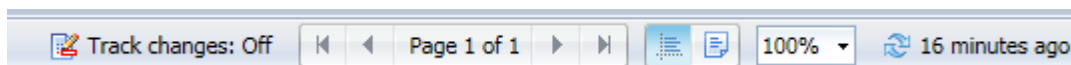
You must be in Quick Display Mode for this to function properly.

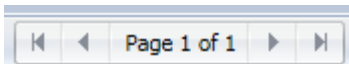



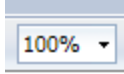
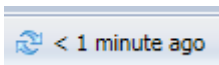
- Outline**  - This option is an advanced feature and will not be covered now.

## Status Bar

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

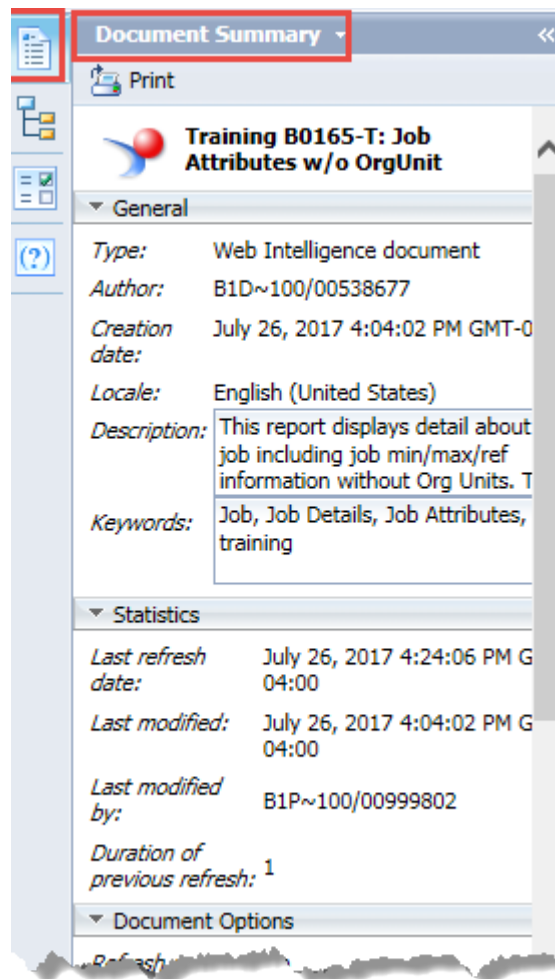


- Track changes:** This option is an advanced feature and will not be covered now.
- Navigation:**  allows you to move through the pages of a document. If there is a + sign next to the second page number, this indicates the report is more than one page. If you click on the "Page 1 of 1+" text, you can enter a page number for direct navigation.

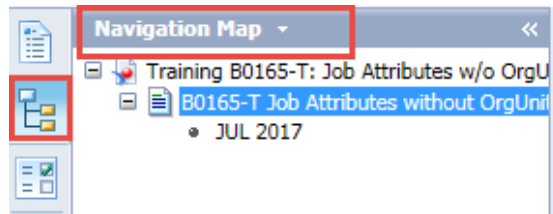
- **Display Options:**  allows you to toggle between Quick Display mode and Page mode. Page mode gives you a preview of how it will look when printed. You must be in Quick Display mode when using the Freeze functionality.
- **Zoom:**  allows you to zoom in or out on the document.
- **Refresh:**  allows you to refresh data on demand and provides the length of time since the last refresh action.

## Navigation Panel

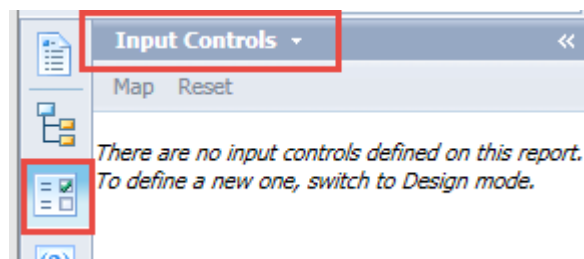
- **Document Summary** - provides information about the report you are viewing, such as the type, author, refresh date, document and data options, and Parameters (Prompts).



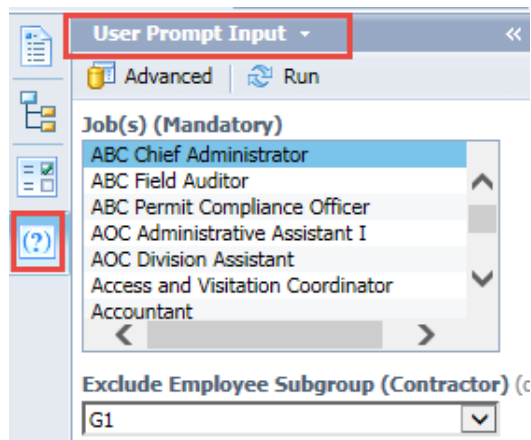
- **Navigation Map** - allows navigation between sections and tabs of the report.



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



- **User Prompt Input** - reflects the prompts that were selected when the report was launched.



## SUMMARY

In this lesson, you learned to:

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

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# Lesson 6: Business Objects - Web Intelligence Design Mode


## Objectives

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

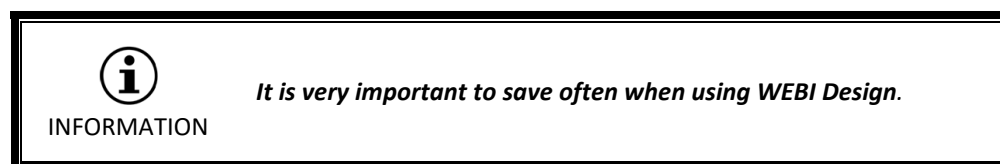
## Design Mode

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

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

top right of the toolbar .

**NOTE:** Effective June 2019, all WEBI reports were updated to include a new feature where the report description will launch when clicking on the title of the report. The report description will open in a separate tab.

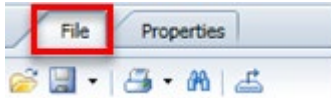



## Toolbars

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

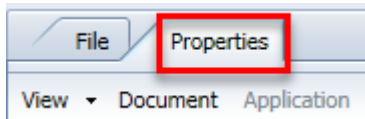


- **File Tab:** provides access to features for opening, saving, printing, searching, and exporting documents.

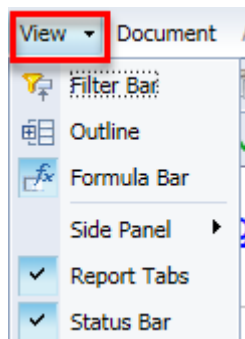


**Save:**  allows you to save a report in the My Documents drawers, My Favorites folder. It is very important to Save your report often while working in Design mode.

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

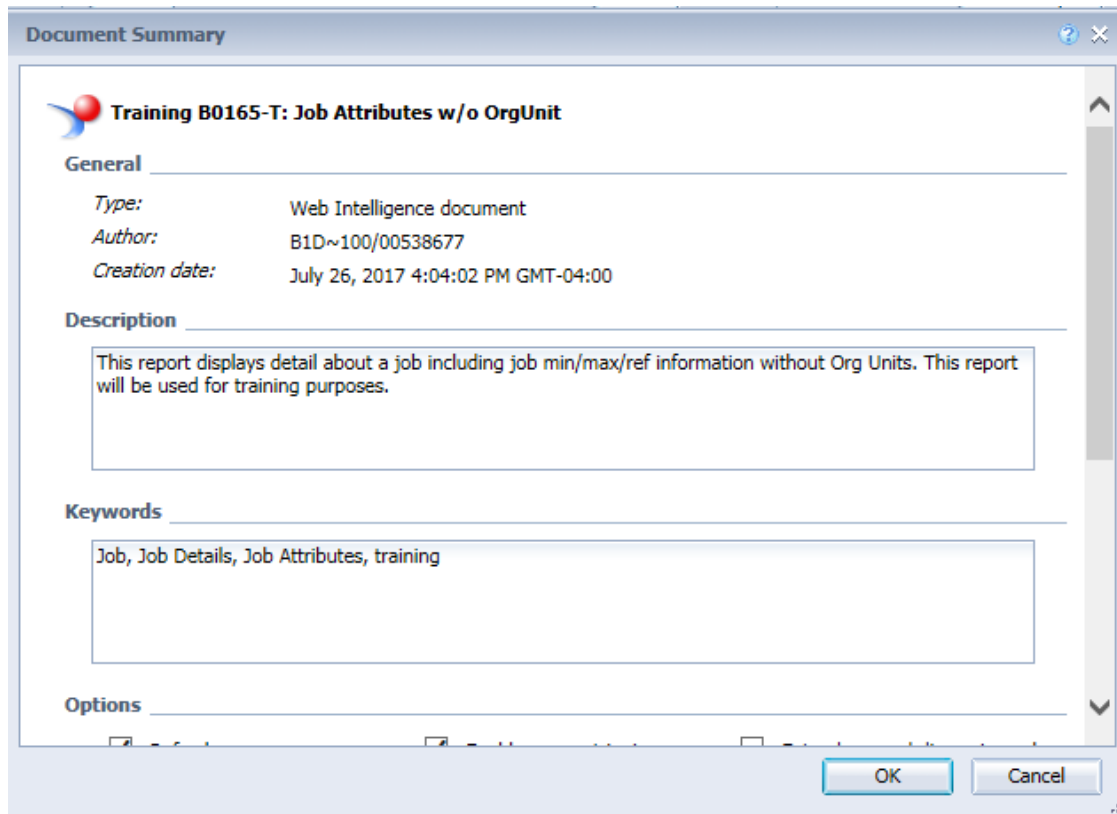


- **View:** allows you to view and hide the various menu bars such as Filter Bar, Outline, Formula Bar, Side Panel, etc.



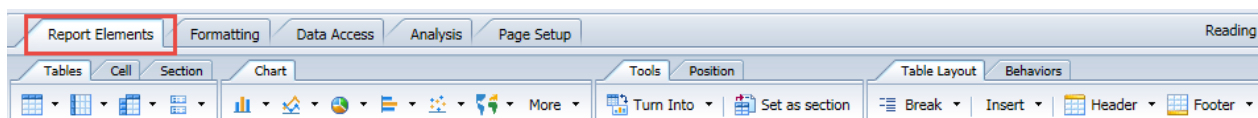


- **Document:** allows you to modify the current document properties such as Description and Keywords.

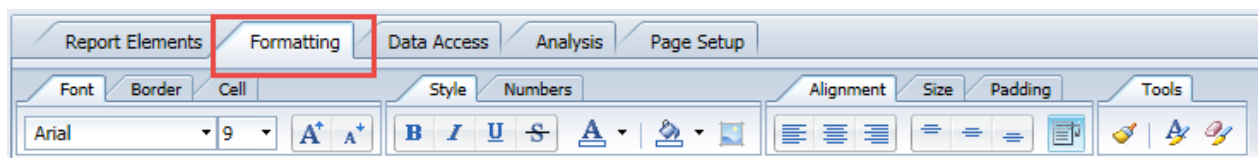


The image shows a 'Document Summary' dialog box for a report titled 'Training B0165-T: Job Attributes w/o OrgUnit'. The dialog has several sections: 'General' with fields for Type (Web Intelligence document), Author (B1D~100/00538677), and Creation date (July 26, 2017 4:04:02 PM GMT-04:00); 'Description' with a text area containing 'This report displays detail about a job including job min/max/ref information without Org Units. This report will be used for training purposes.'; 'Keywords' with a text area containing 'Job, Job Details, Job Attributes, training'; and 'Options' with various checkboxes. At the bottom right are 'OK' and 'Cancel' buttons.

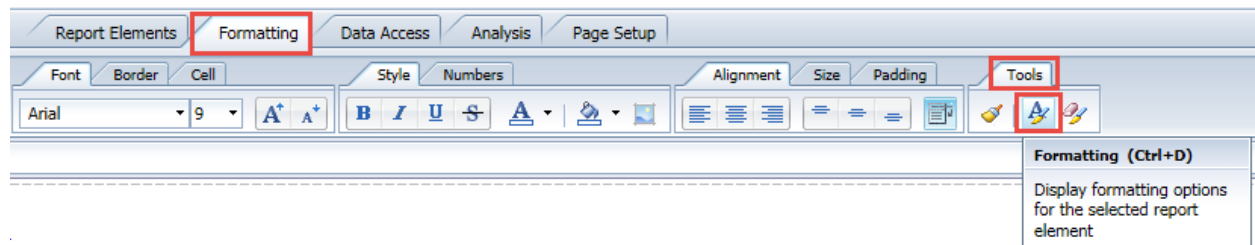
- **Report Elements Tab:** allows access to functions for inserting and modifying various report elements such as tables, cells, sections, and charts. The tab gives you control over the layout of these elements:



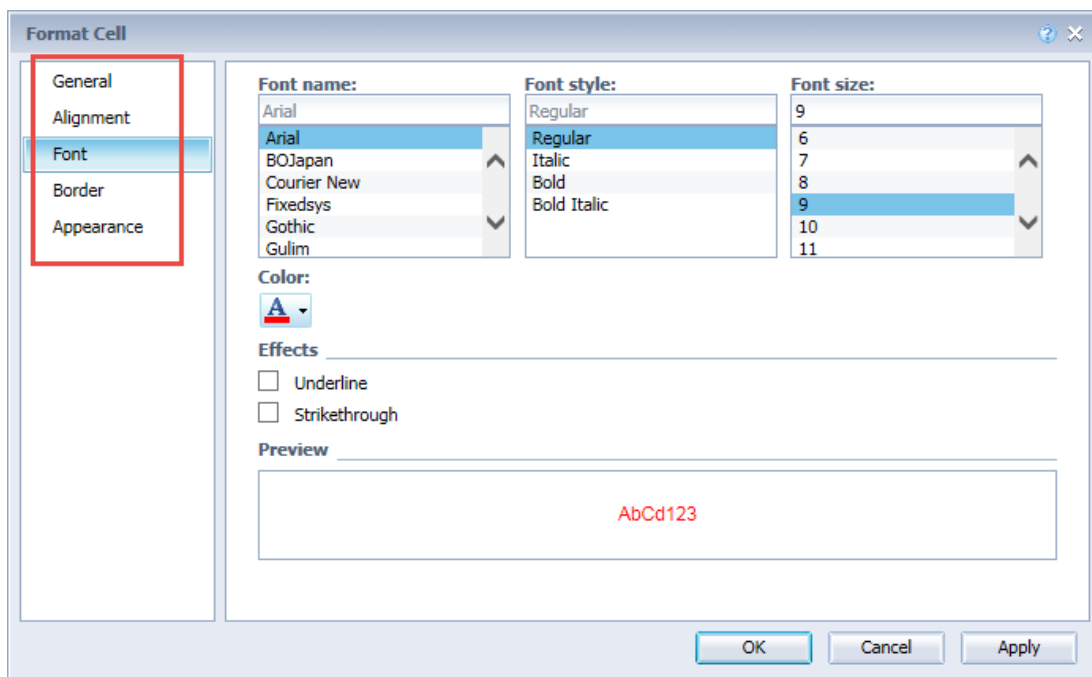
- **Formatting Tab:** allows you to format individual cells, column headings, and columns or rows of data. You can also copy the formatting from one cell to another.



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

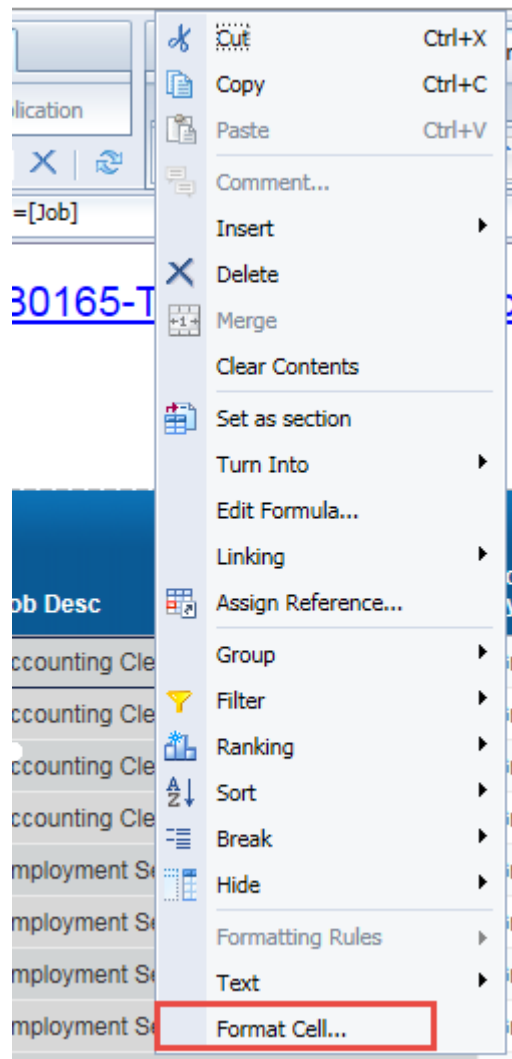


2. The following Format Cell pop-up box will open for you to make your selections:

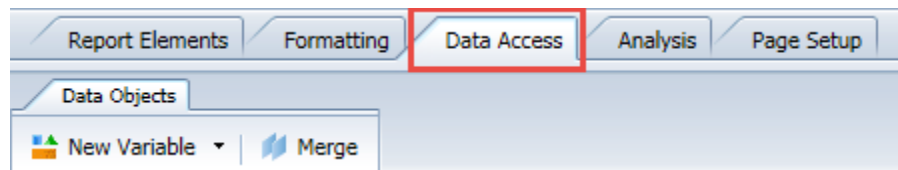


3. Once the formatting is complete, click OK.
  - **General tab** - provides options for changing the overall size and display settings for the cell(s)
  - **Alignment tab** - enables you to define cell alignment and padding, and to wrap text or merge cells.
  - **Font tab** - allows you to change the format of the font in the selected cell(s).
  - **Border tab** - enables you to adjust the lines around the selected cell(s).
  - **Appearance tab** - provides options for changing the cell background using colors or images. You can choose a predefined color or create your own custom color.

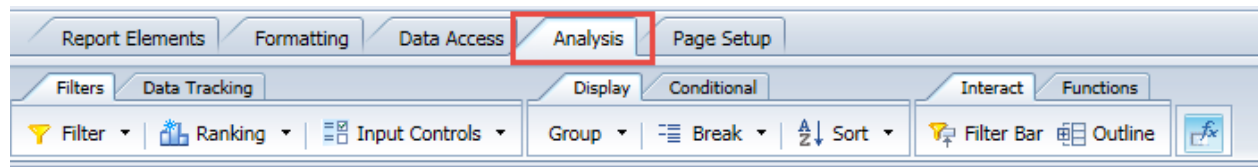
**NOTE:** You can also right click in a field within the report to open the pop up window with options available from the various menus to use:



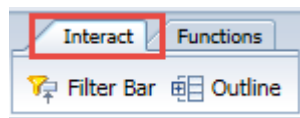
- **Data Access Tab:** allows user to create new variables. The Merge function is an advanced feature and will not be covered during class.



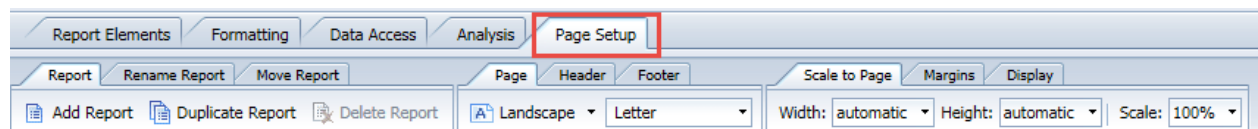
- **Analysis Tab:** allows you to work with and examine the data in your report. You can apply filters, database ranking, input controls, data tracking, breaks, sorts, format rules, and simple arithmetic functions to your data. The Ranking, Data Tracking and Outline functions are advanced features and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



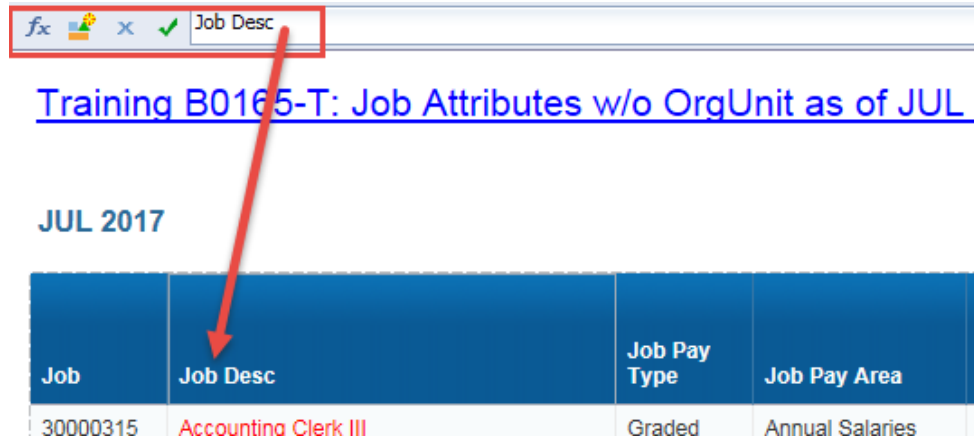
- **Interact Sub Tab:** allows you to enable Filter Bar and Outline Mode. These features are also available in Reading Mode:



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



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



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

31000190	Property Security Officer	Banded	Career Banding	31000190
31002629	IT Security Specialist	Banded	Career Banding	31002629
31002975	ABC Permit Compliance Officer	T-Grade	Annual Salaries	TG65
31004025	Chief Information Security Officer	Graded	Judicial	JB29
31004036	Enterprise Risk & Security Director	Information Tech	Annual Salaries	IT14


B0165-T Job Attributes without OrgUnit	Report 2
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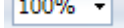
## Status Bar

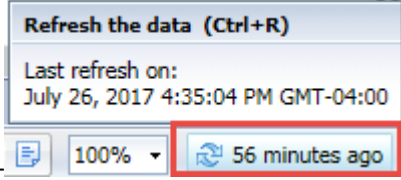
At the bottom of the report page is the Status Bar, that allows you to navigate the pages in the report, change display mode, modify screen magnification, and refresh the report data.



- **Navigation:** - shows the current/total pages of the document. It allows you to move through the pages of a document. A + sign next to the second page number indicates the report is more than one page. Use the arrows to navigate to other pages (First Page, Previous Page, Next Page, and Last Page) or if you click on the "Page 1 of 1+" text, you will be able to enter a page number for direct navigation.

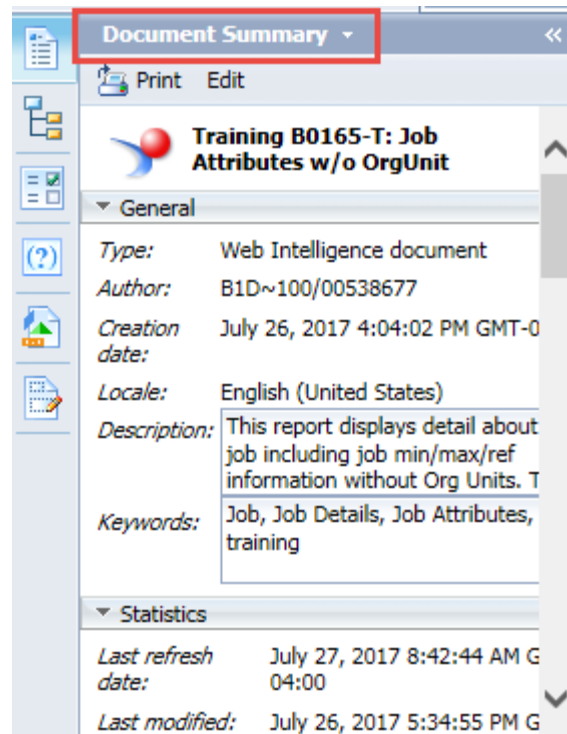
- **Display Options:**  - allows you to toggle between Quick Display mode and Page mode. Page mode gives a preview of how it will look when printed. You must be in Quick Display mode when you use the Freeze functionality in Reading mode.

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

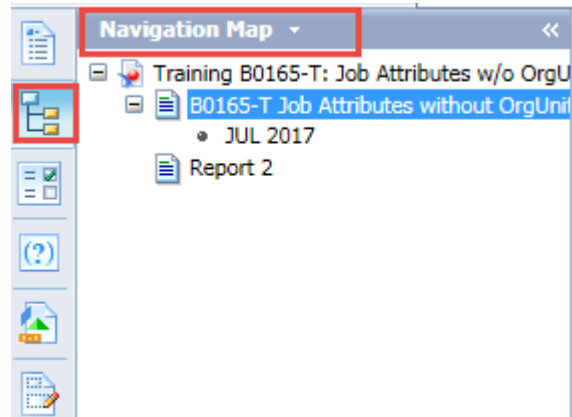
- **Refresh Button:**  - shows the last date and time the report was refreshed with the latest data. Click on the Refresh icon to trigger a new refresh.

### Navigation Left Side Panel

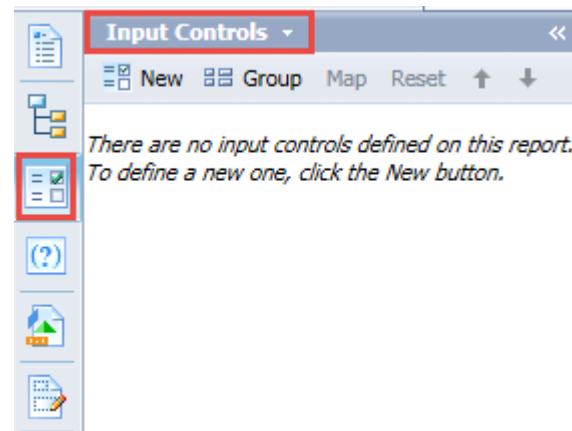
- **Document Summary Panel:** displays information about the document properties, such as the author, refresh date, document and data options, and parameters.



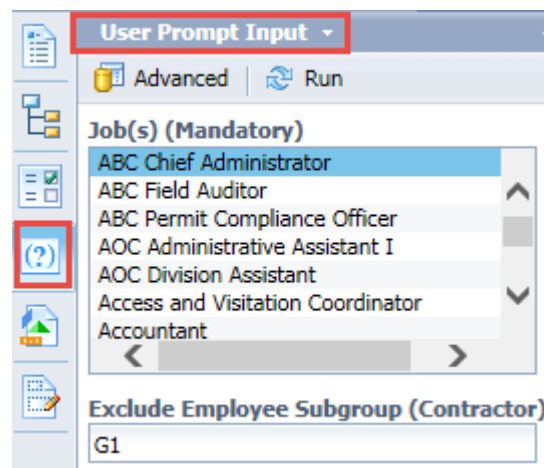
- **Navigation Map:** allows you to see an outline of all reports and elements within the document.



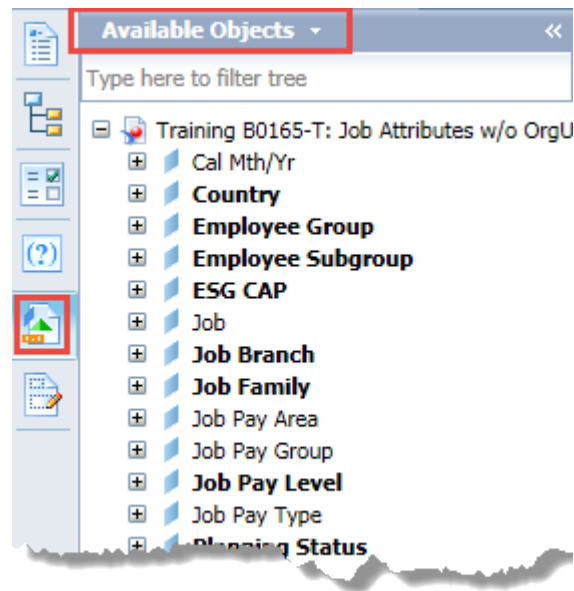
- **Input Controls Panel:** allows you to add and edit input controls applied to the document. Input Controls (interactive filters) are report specific. We will go over these in more detail at the end of the session.



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





- **Available Objects Panel:** displays the list of the available objects and variables that can be added to the report, once in Design mode. The list includes dimensions and measures.




The list is unique to the report being generated.

If the available object is **bold**, it indicates that the data element or measure is not currently included in the report.

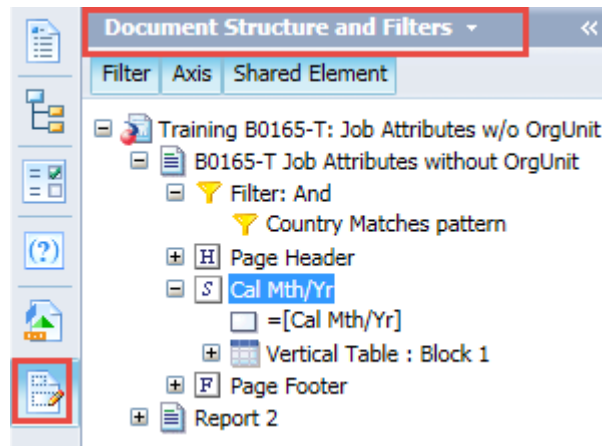
- **Dimensions:**  - key data elements, such as Position - Text or Position - Key. Dimension objects represent the basic structure of the data. Text is a description of the data element where a Key is a unique number/code for the data element. (Ex. Employee - **Text** is the Employee Name, Employee - **Key** is the Employee's Personnel Number.) Org Unit, Job, Position, and Employee dimensions all have attributes  associated with them.

**PROCESS TIP:** You can drag and drop an attribute in the report even if the associated dimension is not in the report; however, the system may not calculate the measures correctly resulting in a Multivalue error message. See \_Help/Job Aid folder located in the Public Folders/HR-Payroll folder for more information regarding this error. You can also visit the OSC Training website.

- **Measures:**  - numeric values that are the result of calculations.
- **Variables** - If you have created a formula that you may want to apply more than once in the report, you can save the formula as a variable to make it reusable.



- **Document Structures and Filters Panel:** allows you to view all the elements that make up the document, such as the headers, sections, report blocks, and footers, as well as the filters. Expand the sections to see all the filters and other details. Pre-existing report filters can be edited, and additional filters can be added.



## Adding Objects to a Report

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

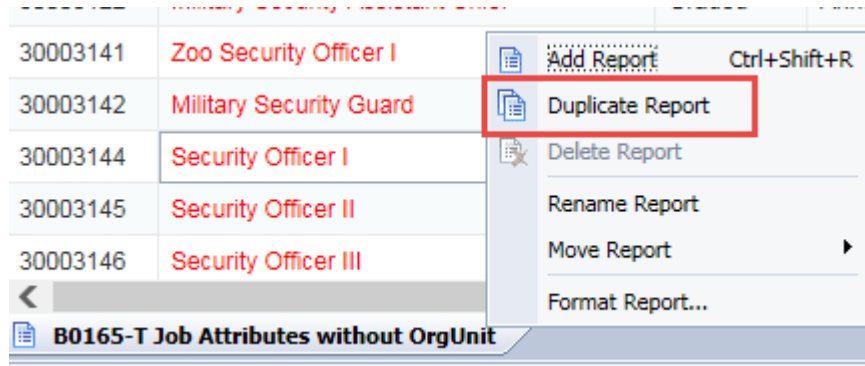
Once the report is open, we are going to add an object to the report, and then we are going to add a formula and variable. We will also format the new column data.

**PROCESS TIP:** It is good practice to first make a duplicate copy of a report before making major modifications. This way, if the changes don't work, you still have the original version of the report. Also, remember to save your changes frequently.

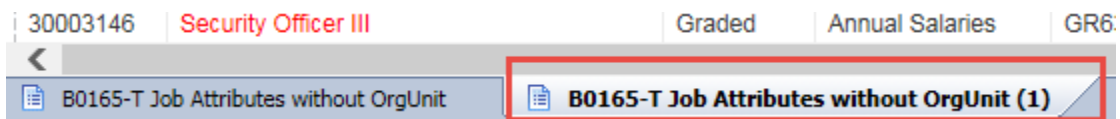
1. Change to Design Mode.



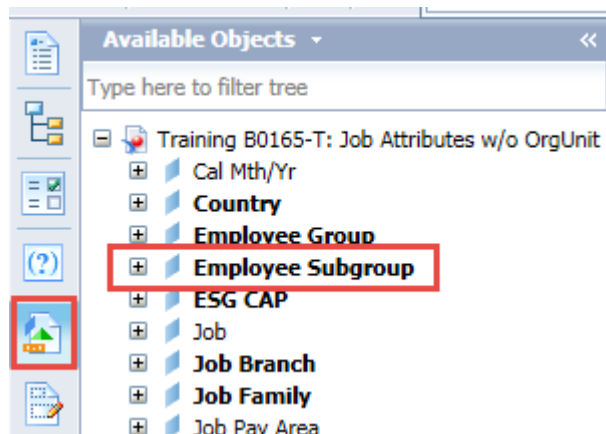
2. First duplicate the Report 1 tab by right clicking on the Report 1 tab and selecting Duplicate Report in the pop-up menu. You can also click on the Page Setup tab, Report sub-tab and Duplicate option.

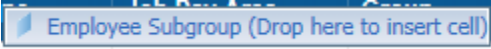


An exact copy of the Report 1 tab is added to the document and is now the active report. You can rename the tab by right clicking on tab and selecting Rename Report from the menu, or you can double click on the new report tab and type the new name.



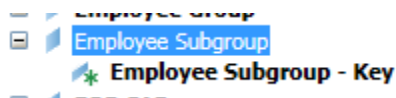
3. Click on the Available Objects button to show the list of available objects. In this exercise, add the Employee Subgroup Text object to the report.



- To add the object to the report, left click on the object title and drag it to the report. You will notice a rectangle icon  moving along with the mouse cursor indicating to drop here to insert cell.



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




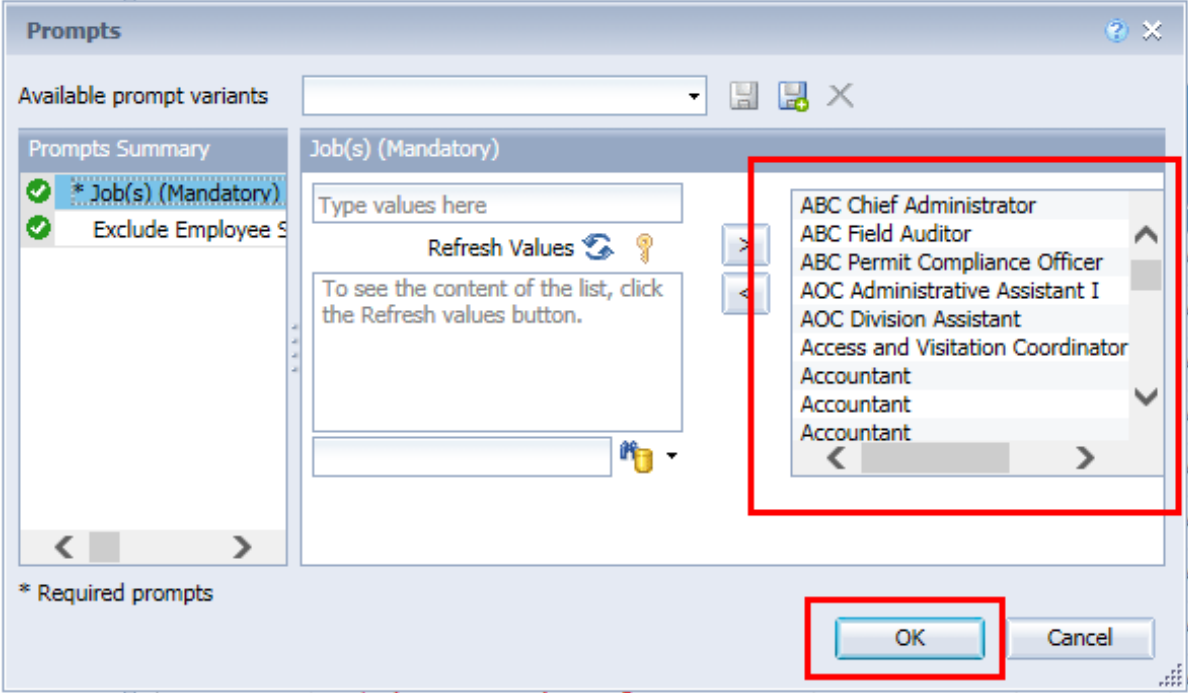
Notice that the expanded entry indicates - Key. The main selection is a text field and the Key selection is the key field information. Notice the difference in the two that were added to the report:

Employee Subgroup	Employee Subgroup - Key	Job Pay Type
FT S-FLSAOT Perm	B1	Graded
FT S-FLSAOT Perm	B1	Graded
FT S-FLSAOT TI	B3	Graded

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

	Employee Subgroup	Job Pay Type
ing Clerk III	#REFRESH	Graded
ing Clerk IV	#REFRESH	Graded
ing Clerk V	#REFRESH	Graded
inn Clerk Supervisor V	#RFFRESH	Graded

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



**Prompts**



Available prompt variants

Prompts Summary

- \* Job(s) (Mandatory)
- Exclude Employee S

Job(s) (Mandatory)

Type values here

Refresh Values  

To see the content of the list, click the Refresh values button.

ABC Chief Administrator  
ABC Field Auditor  
ABC Permit Compliance Officer  
AOC Administrative Assistant I  
AOC Division Assistant  
Access and Visitation Coordinator  
Accountant  
Accountant  
Accountant

\* Required prompts

OK Cancel

30003118	Security Guard	#REFRESH	Graded	An
30003122	Military Security Assistant Chief	#REFRESH	Graded	An

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

	Employee Subgroup	Job Pay Type
	FT S-FLSAOT Perm	Graded
	FT S-FLSAOT Perm	Graded
	FT S-FLSAOT TL	Graded
	FT S-FLSAOT Perm	Graded
	FT S-FLSAOT Prob	Graded
	FT S-FLSAOT Perm	Graded
Manager	FT N-FLSAOT Perm	Graded
Supervisor	FT N-FLSAOT Perm	Graded

**PROCESS TIP:** When dragging and dropping an available object, you will see the message inside the rectangle icon changes to 'drop here to replace cell' or 'drop here to insert cell.' If you are dragging an object and dropping near an existing column, you must read the rectangle icon message. If your icon reads replace cell, it means it is replacing the current column. If the icon reads insert cell, you are inserting either before or after the cell depending on your cursor location.

**NOTE:** Dimensions can be placed behind measures in a report.



## Adding Columns, Creating Formulas, and Creating Variables

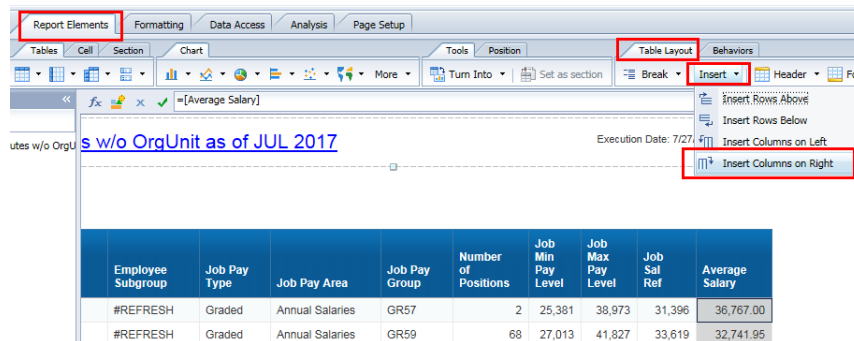
We are going to add a column to grant a 10% increase to the Job Sal Ref column and then add another column to show how to use a variable to add the 10% increase to the Job Sal Ref value.

### Adding Columns

In Web Intelligence - Design Mode, you can add a column to a table by dragging an available object to the desired location or by inserting a blank column in the report. Below are two approaches for inserting a blank column:

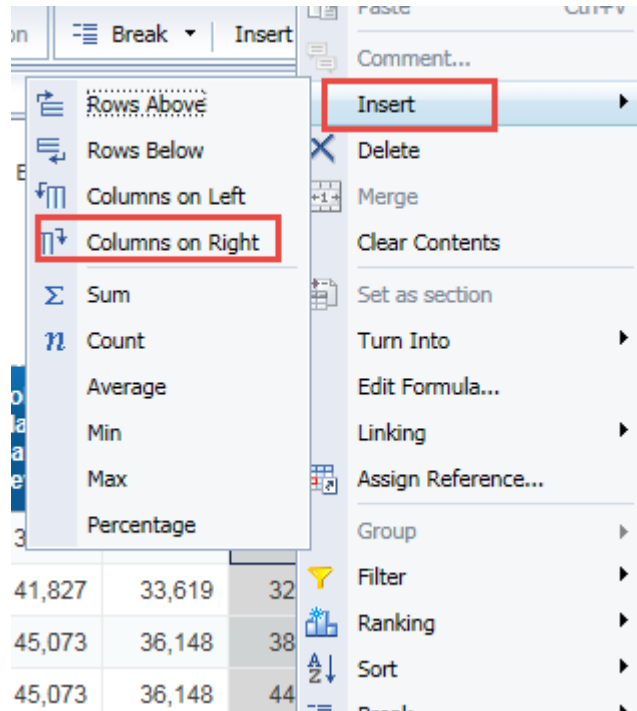
#### Method 1 – Using the Report Elements Tab:

1. Click on the column in the report where you want to insert the new column. In this exercise, click the **Average Salary** column.
2. Click the Report Elements tab, go to Table Layout sub-tab, click on the Insert function, and select Insert **Columns on Right**.



**Method 2 – Right Click on Column**

1. Click on the column in the report where you want to insert the new column. In this exercise, click the **Average Salary** column.
2. Right click on the highlighted column, select **Insert** from the menu list, and click on **Columns on Right**.



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

## Creating a Formula

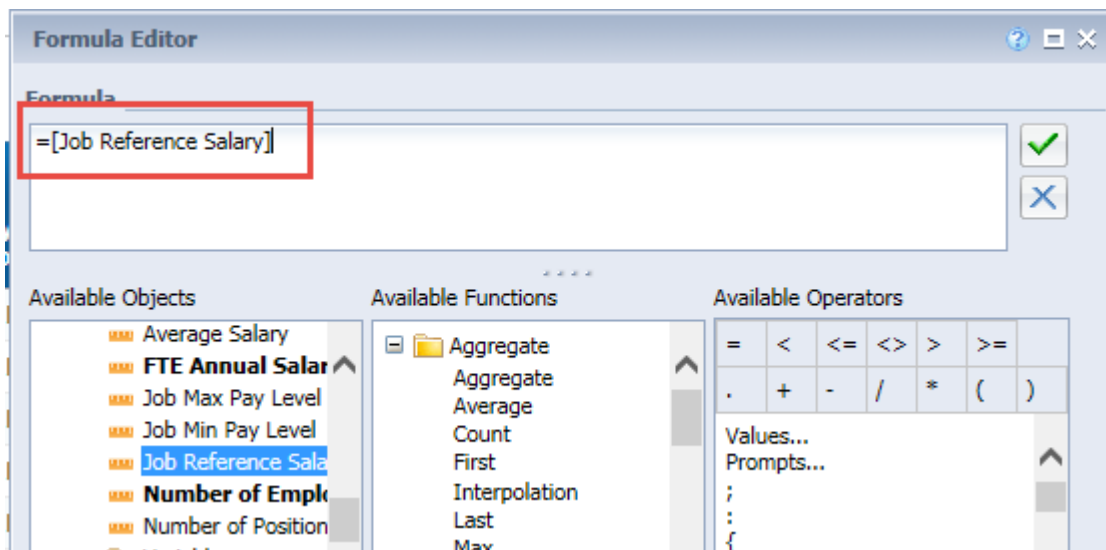
Web Intelligence - Design Mode enables you to create custom formulas to calculate values that are not stored in your data source.

1. Click in the first cell under the header row to highlight the new column you just added to your report.
2. Click on the Edit the Formula button, or right click and select Edit Formula

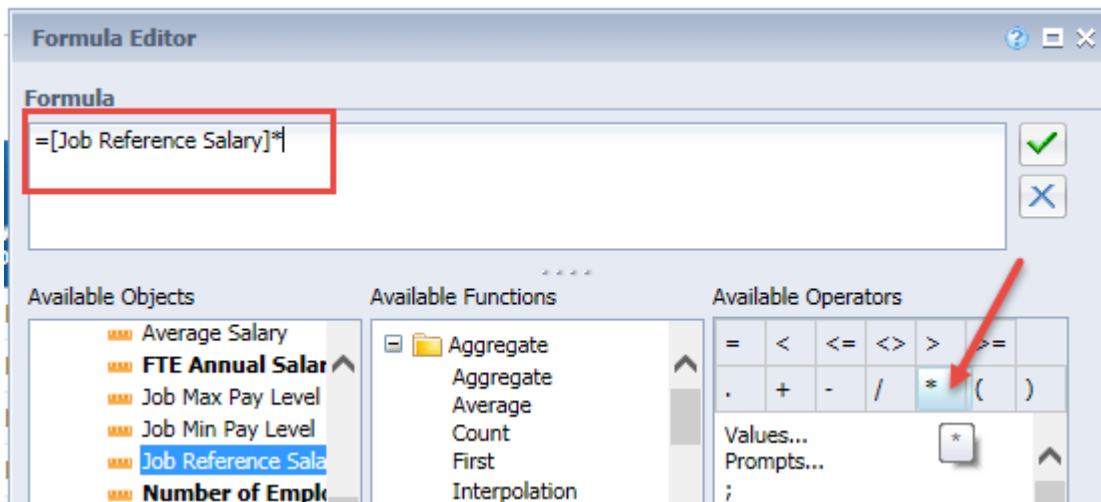



3. In the Formula Editor box, fill in the following values to construct the formula. You will construct the formula to calculate a 10% increase by multiplying Job Reference Salary by 10%.
4. Double click the measure, **Job Reference Salary** from the Available Object list to add it to the Formula box.

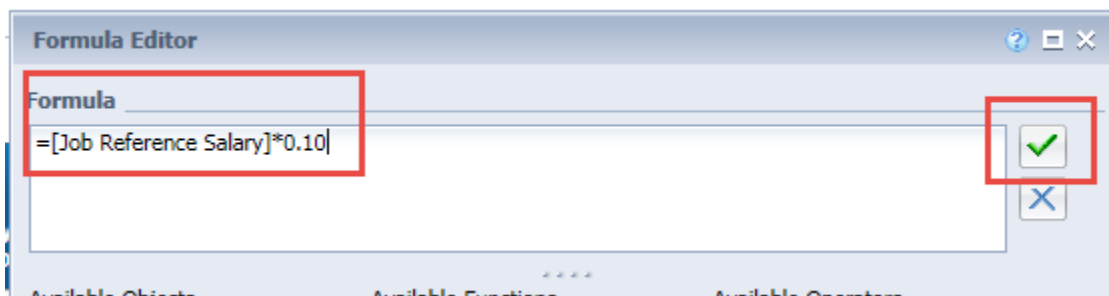
**NOTE:** Brackets are automatically placed in front and behind the available objects in the Formula box. Also, the equal sign is automatically added to the beginning of the formula when you select the first available object.



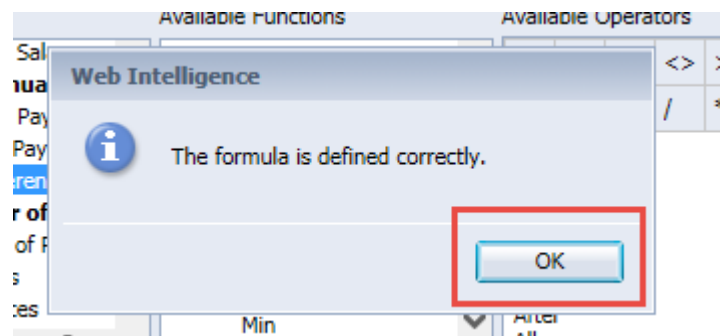
- Single click on the appropriate Available Operator. In this exercise, we are multiplying; therefore, select the asterisk (\*).



- Click in the Formula box to the right of the \* and enter 0.10 - this is the 10% increase based on the Job Reference Salary value. Once the formula is complete in the Formula box, click the green check  to validate.

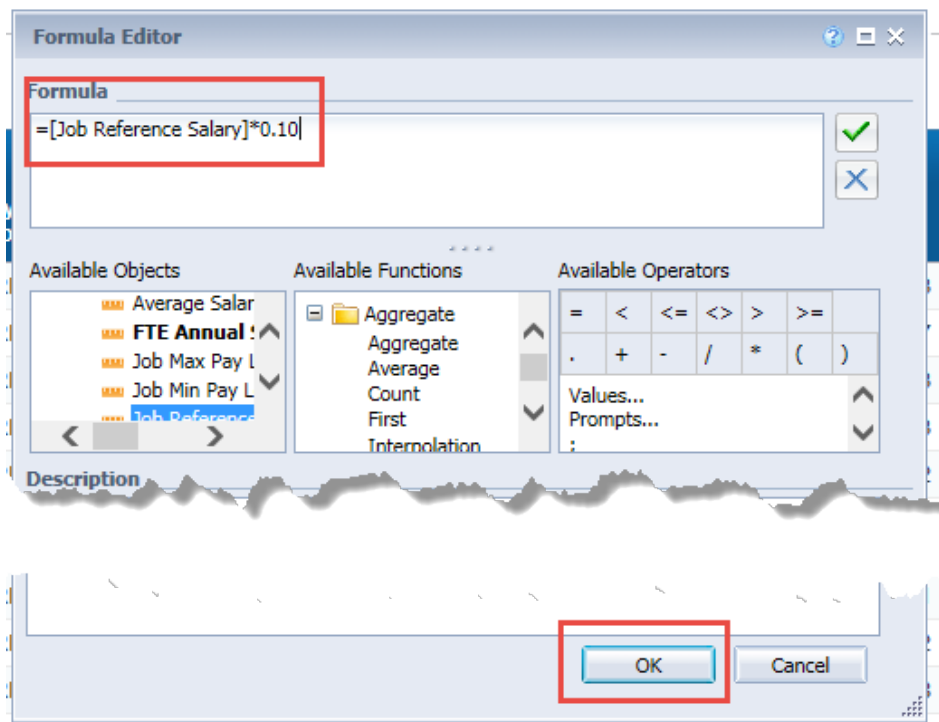


- Click OK.






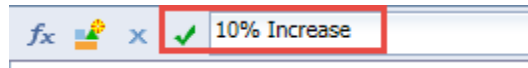
- A. Click OK to close the Formula Editor if the formula is defined correctly.



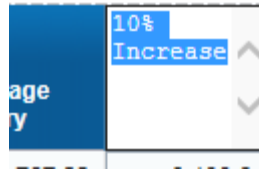
The calculation now displays in the new column.

	Job Sal Ref	Average Salary	
073	31,396	36,767.00	3,139.6
027	33,619	32,741.95	3,361.9
073	36,148	38,025.56	3,614.8
073	36,148	44,848.00	3,614.8

8. To add a title to the column, click in the column header area of the new column and type the title in the Cell Formula Bar Text box. Once the title is entered, click the green check  to validate the formula. You can double click in the column header and press enter once you have typed the title.



Or



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

average ary	10% Increase
6,767.00	3,139.6
2,741.95	3,361.9
8,025.56	3,614.8
4,848.00	3,614.8
0,774.63	7,283.3
7 031.00	7 283.3



## Creating a Variable

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

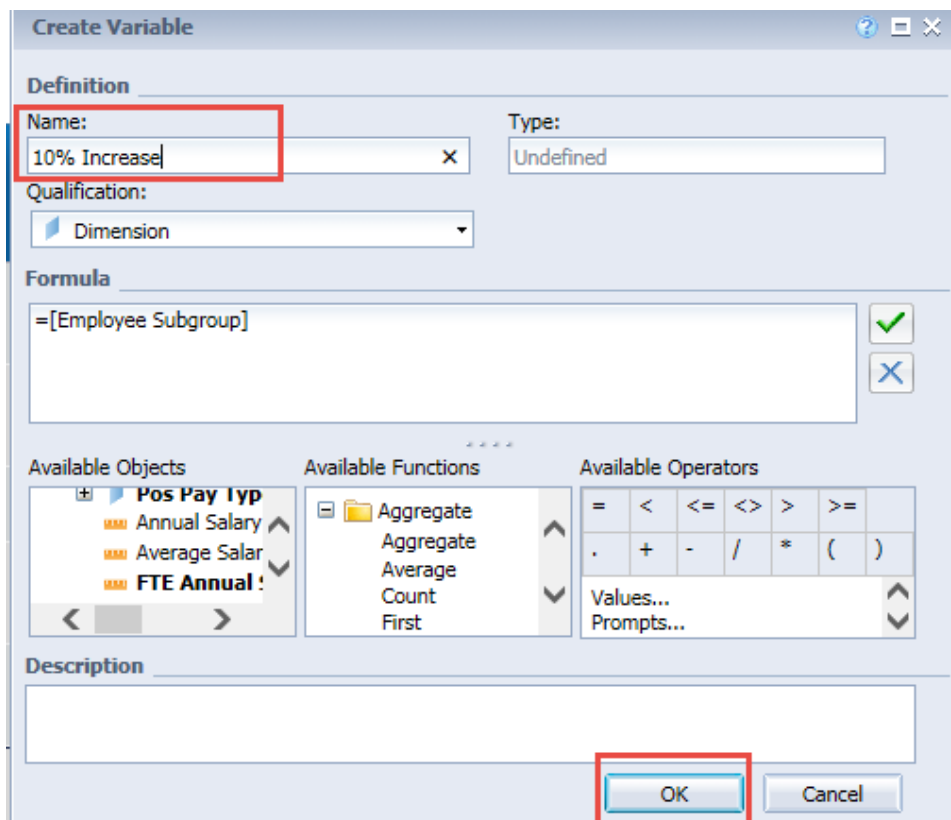
1. Click on the 10% Increase column to set as a variable and then click on the Variable icon on the formula bar.



Execution Date: 7/27/17

	Employee Subgroup	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	10% Increase
	FT S-FLSAOT Perm	Graded	Annual Salaries	GR57	2	25,381	38,973	31,396	36,767.00	3,139.6
	FT S-FLSAOT Perm	Graded	Annual Salaries	GR59	65	27,013	41,827	33,619	32,741.95	3,361.9

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



**Create Variable**

**Definition**

Name: 10% Increase X

Type: Undefined

Qualification: Dimension

**Formula**

=[Employee Subgroup] ✓ X

**Available Objects**

- Pos Pay Typ
  - Annual Salary
  - Average Salar
  - FTE Annual!

**Available Functions**

- Aggregate
  - Aggregate
  - Average
  - Count
  - First

**Available Operators**

= < <= <> > >=

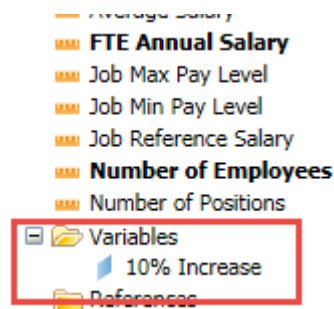
. + - / \* ( )

Values... Prompts...

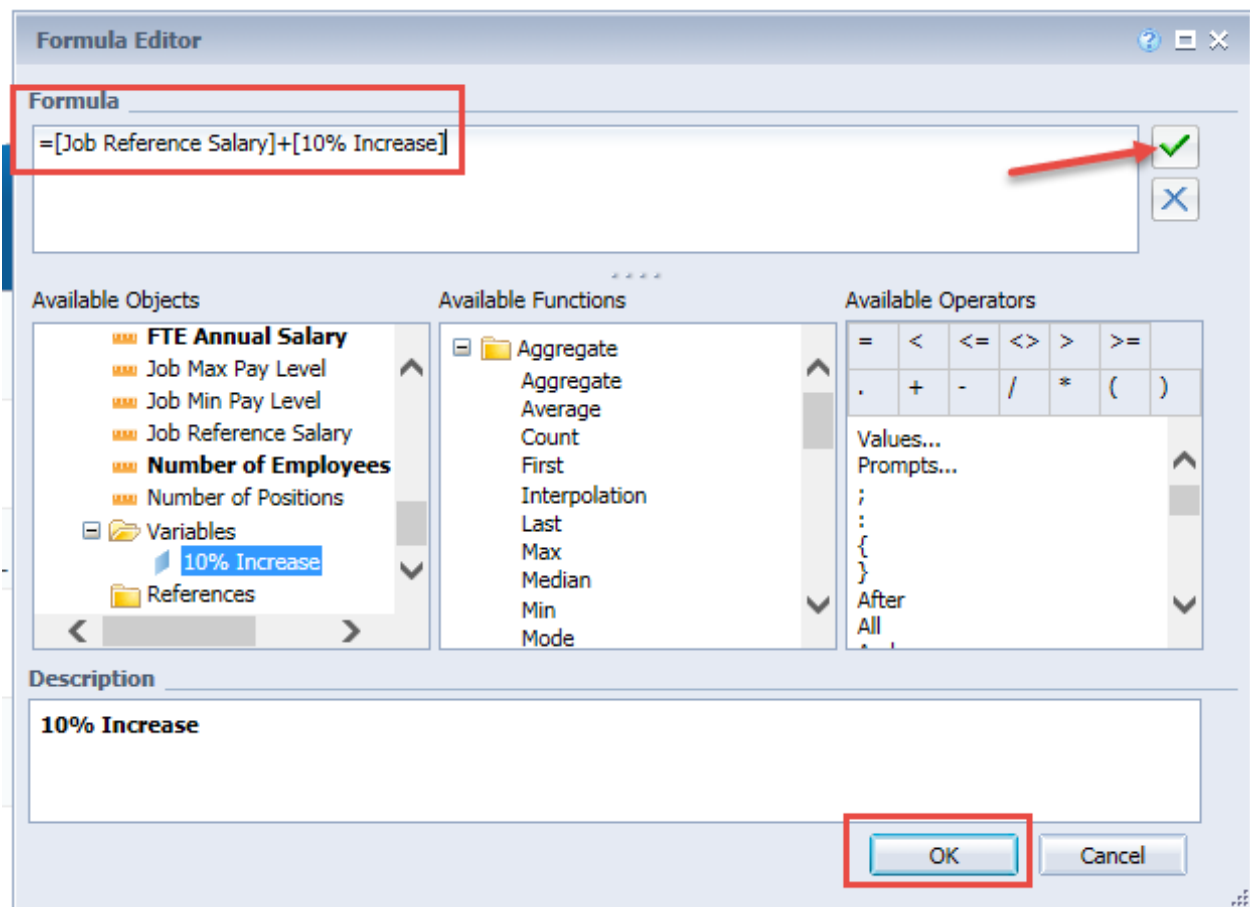
**Description**

OK Cancel

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



- Now that the variable has been created, we will add another column to the far right of the report and use the variable to calculate a formula.
- Highlight the new column and click the Edit the Formula button. Remember you can also right click and select Edit Formula from the list. We will add the 10% Increase variable to the Job Reference Salary object to calculate the new salary.



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

**NOTE:** Remember to enter a title for the column.

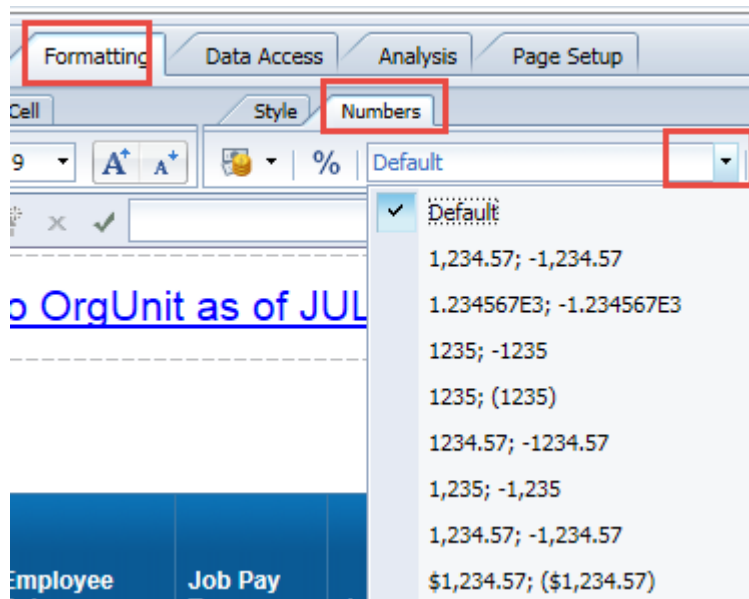
Job Max Pay Level	Job Sal Ref	Average Salary	10% Increase	Job Sal Ref plus 10% Increase
38,973	31,396	36,767	3,139.6	34,535.6
41,827	33,619	32,741.95	3,361.9	36,980.9
41,827	33,619	0	3,361.9	36,980.9
45,073	36,148	38,084.29	3,614.8	39,762.8

## Formatting Numbers

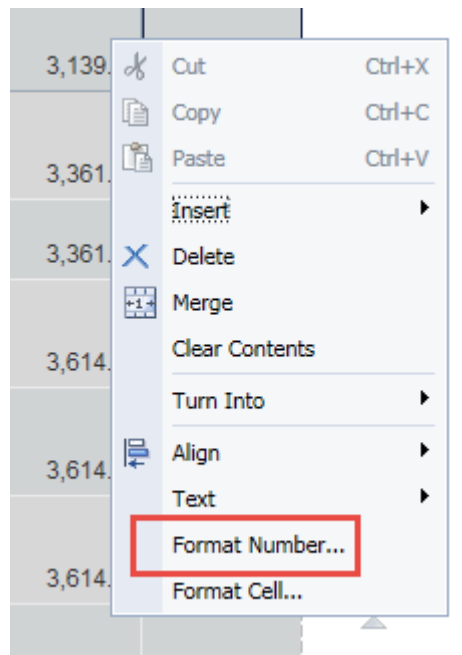
Web Intelligence - Design Mode enables you to adjust the text and number formatting of the values that appear in cells and tables in a report.

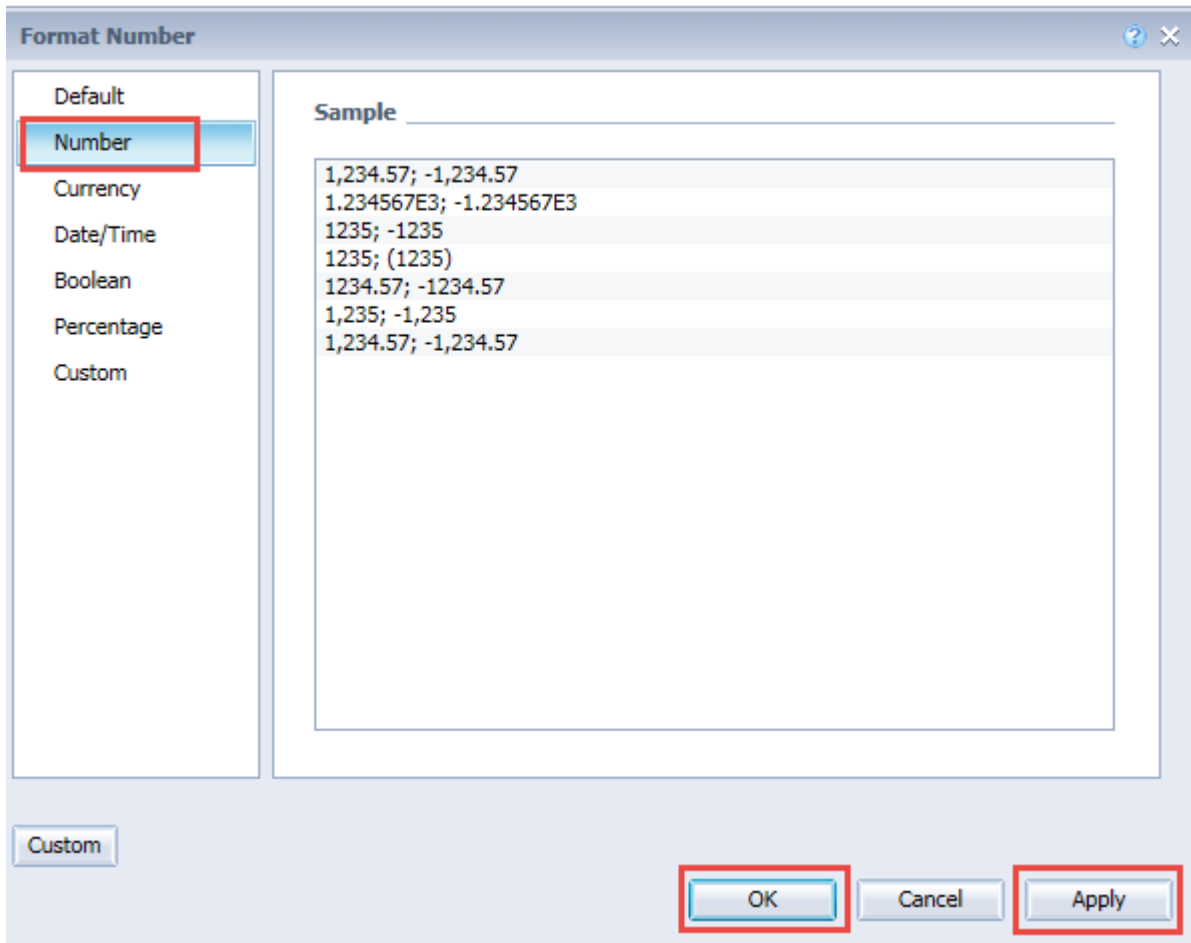
In this exercise, you will change the number formatting for the values in the columns you have added.

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



OR





## Freeze Columns/Rows

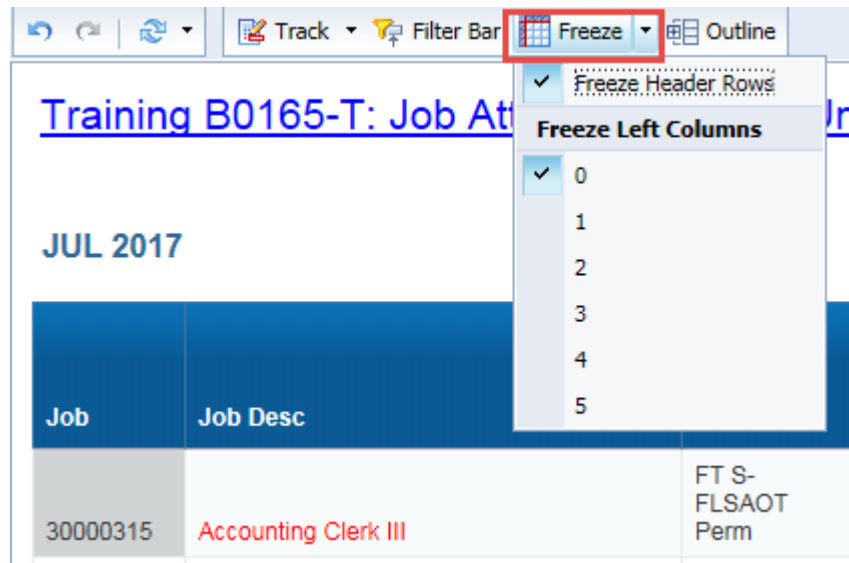
The Reading mode in BOBJ WEBI enables you to freeze column headers or a specific number of columns in a table to ensure that they remain visible as you scroll through the rest of the table.

**NOTE:** The Freeze functionality is not available in Design mode.

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

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

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



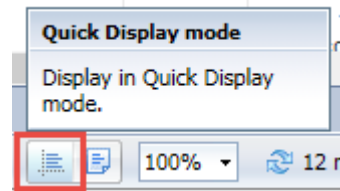
- Select from the drop-down list the number of columns to freeze. In this exercise select 3.
- Once you start to scroll to the right, you will see a dark gray line appear. The first three columns remain visible while you scroll through the additional columns of the table.

Job	Job Desc	Employee Subgroup	Job Pay Area	Job P Group
30000315	Accounting Clerk III	FT S-FLSAOT Perm	Annual Salaries	GR57
30000318	Accounting Clerk IV	FT S-FLSAOT Perm	Annual Salaries	GR59
30000318	Accounting Clerk IV	FT S-FLSAOT TL	Annual Salaries	GR59
30000319	Accounting Clerk V	FT S-FLSAOT Perm	Annual Salaries	GR61
30000319	Accounting Clerk V	FT S-FLSAOT Prob	Annual Salaries	GR61

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

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





**NOTE:** You must be in Quick Display Mode.

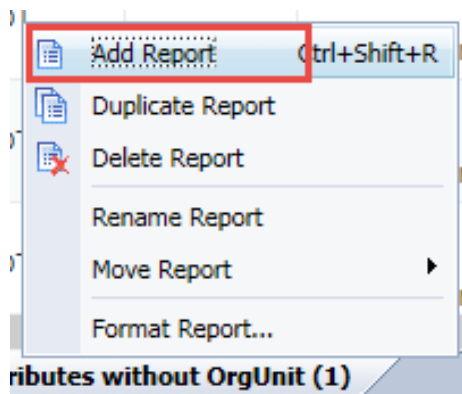


## Creating a Table

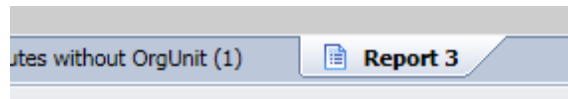
In Web Intelligence - Design Mode, you can create a table by choosing a table layout and dragging and dropping objects in the columns. Alternately, you can choose a table layout and define the columns using a dialog box interface. You will create a table using both methods.

### *Dragging and Dropping Method for Creating a Table*

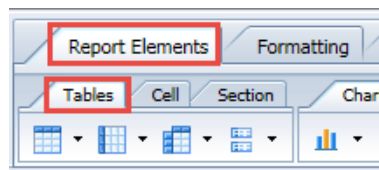
1. First add a new report tab to your report by right clicking on the second report tab and selecting Add Report from the menu list. Also, you can click on the Page Setup tab, Report sub-tab, and Add Report option.



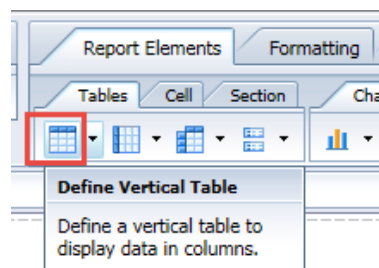
You will see the Report 3 tab at the bottom of your report and a blank workspace. To rename the Report tab, double click on the new report tab and type the new name.



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



3. Click on the Define Vertical Table icon.

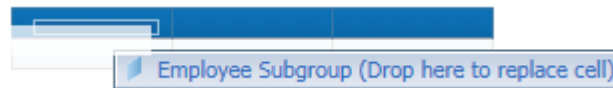


4. Click in the Report Workspace Panel to insert a blank table. In order to view the entire data table, it is very important that you click in the Workspace area below the Header section.



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

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



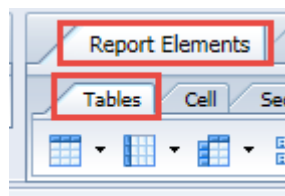
7. Once all objects have been added to your table, you may have to click the Refresh icon to retrieve data.

Employee Subgroup	Position	Job Reference Salary	Number of Positions
FT S-FLSAOT Perm	Accountant	59,342	1
FT S-FLSAOT Perm	Accountant	59,342	1
FT S-FLSAOT Perm	Accounting Clerk V	36,148	1
FT S-FLSAOT Perm	Accountant	59,342	1

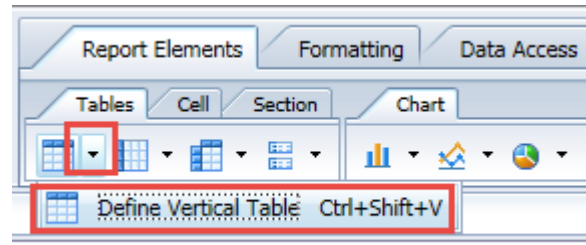
### *Choosing Table Layout Method for Creating Table*

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

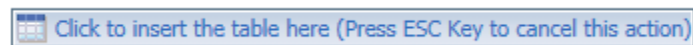
1. First add a new report tab to your report. You will see the Report 4 tab at the bottom of your report and a blank workspace. To rename the Report tab, double click on the new report tab and type the new name.
2. Click on the Report Elements tab and select the Tables sub-tab.



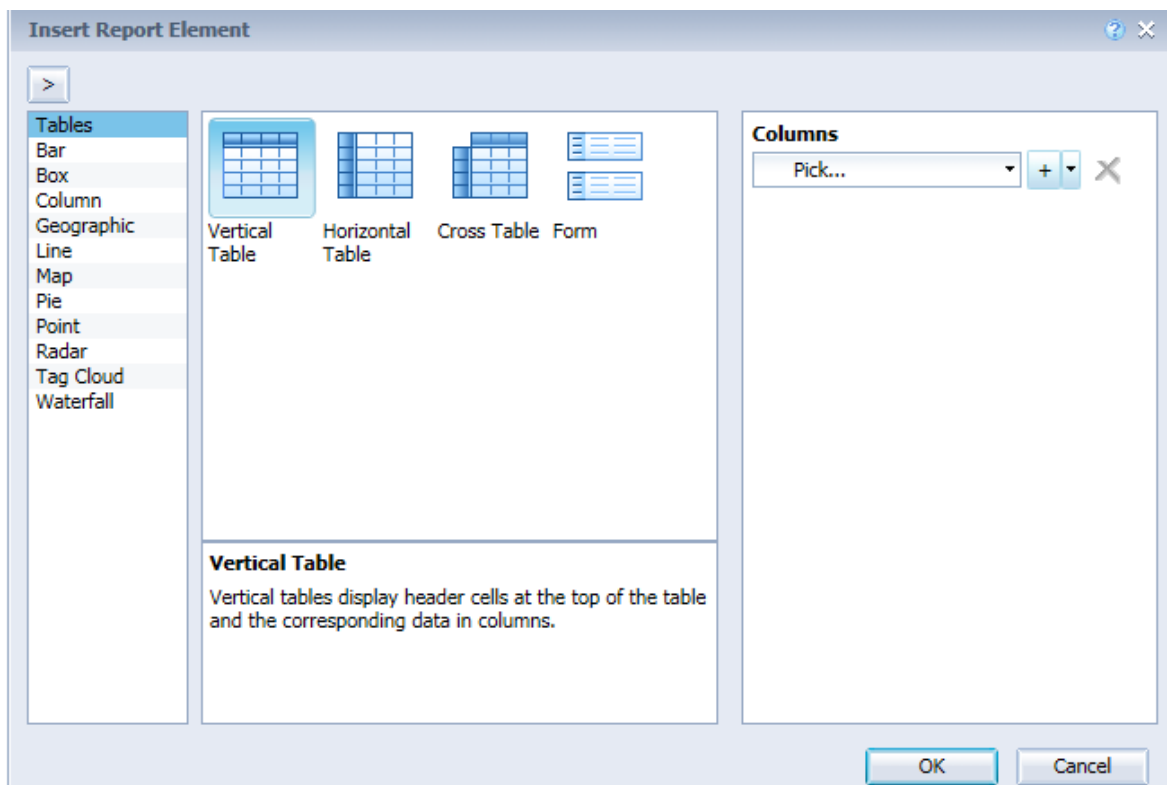
- Click on the drop-down arrow beside the type of table you want to insert into your report. In this exercise, you will select the first icon to define a vertical table. Click on Define Vertical Table from the drop down.



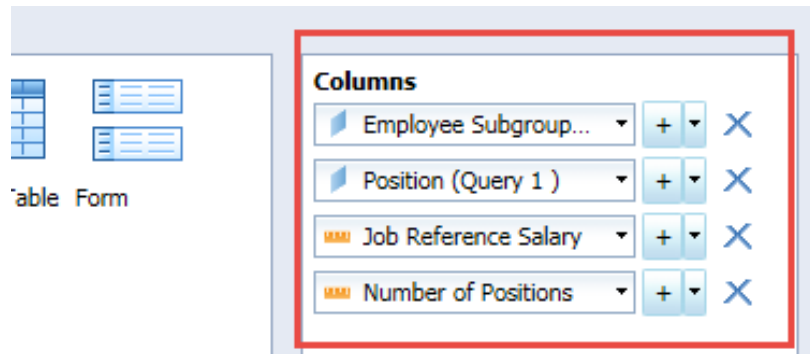
- Click in the blank workspace to insert the table.




- The following dialog box will display. It is very important to click in the Workspace area below the Header section.

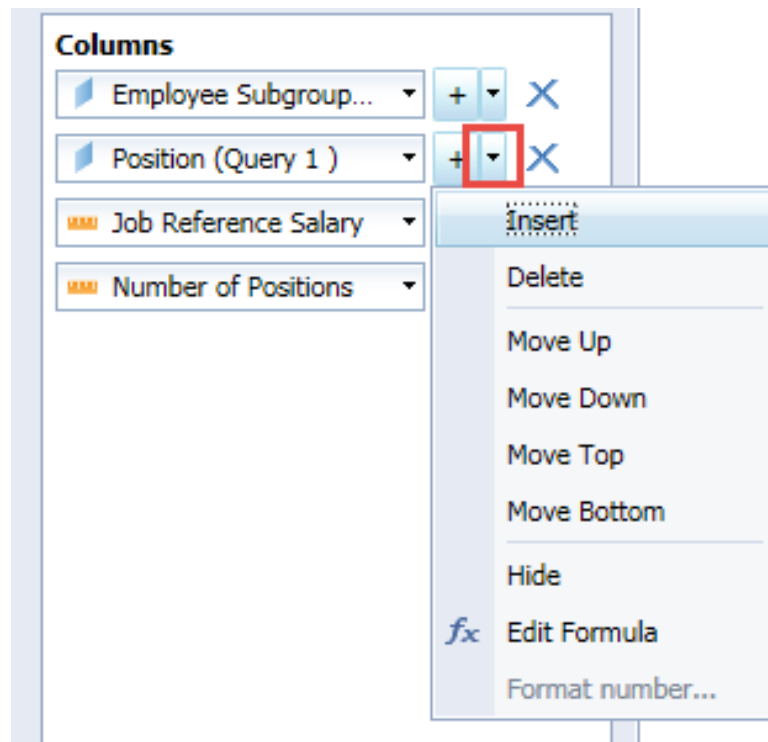


- On the right-hand side, you will see Columns listed with a drop-down arrow. Click on the drop-down arrow and select the object you want added to the report. Note there is a + option beside the selection box. Once you have selected the first object to add, you can add as many other objects as you need by selecting the + and choosing from the list. In this exercise, we will select **Employee Subgroup - Text**, **Position - Text**, **Job Reference Salary**, and **Number of Positions** objects.

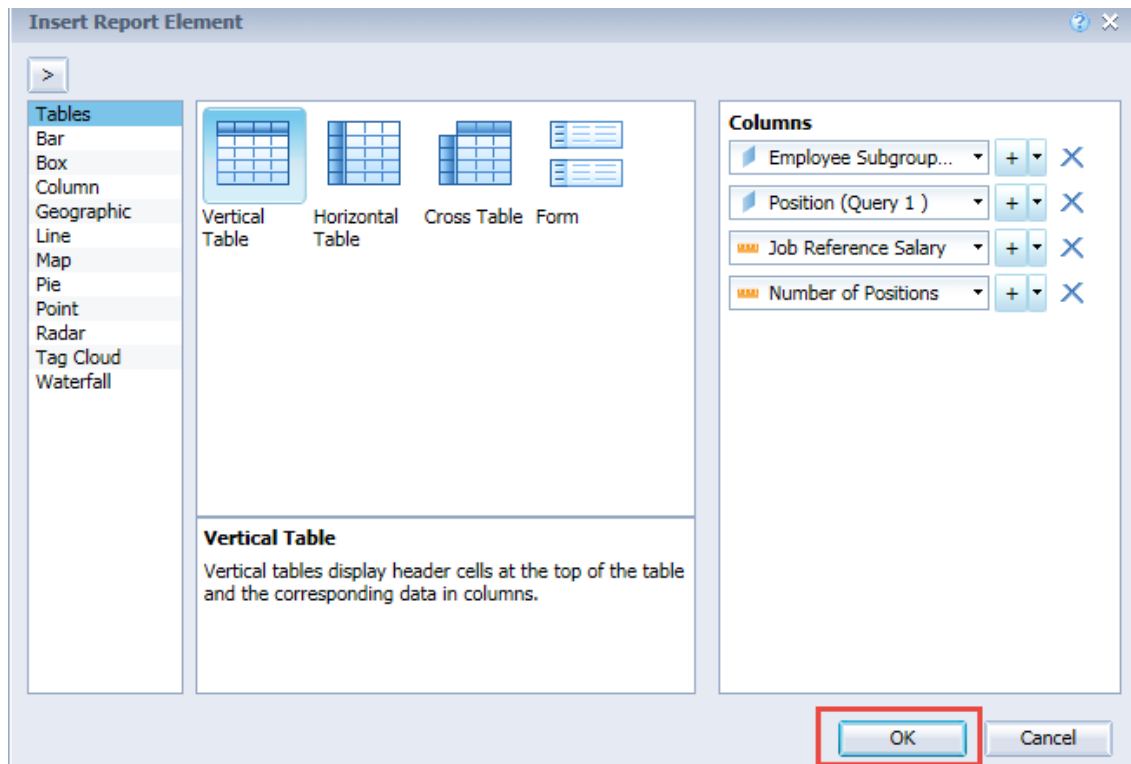



**NOTE:** Click on the  to remove a column if added in error.

**NOTE:** Click the arrows next to the + option to change the placement of the columns (Move Up, Move Down, etc.).



- Once you have selected as many columns for your table as you need, click OK. The table appears in the Report 4 tab.




**NOTE:** You may have to click the refresh button  if you added items to the table that were not part of the original report.



## Resizing Columns and Rows

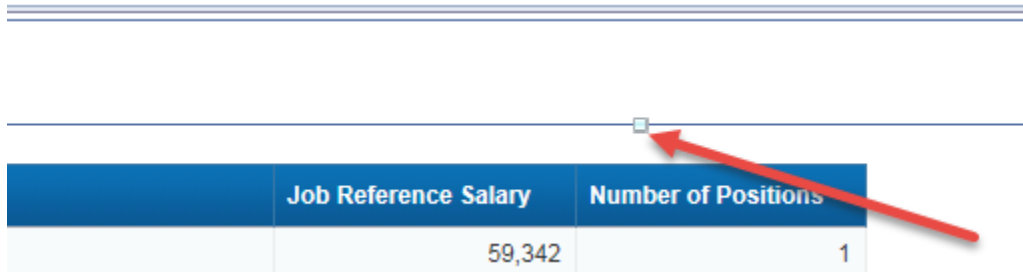
While all your columns fit on one page, you may want to change the column width.

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

## Adding a Header to a Table

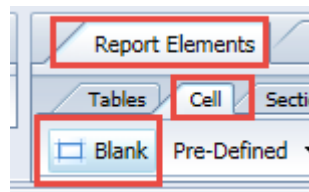
Once you have created a table in your WEBI document, you can add a Header by inserting a blank cell in the Header section of your report and typing the desired text.

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

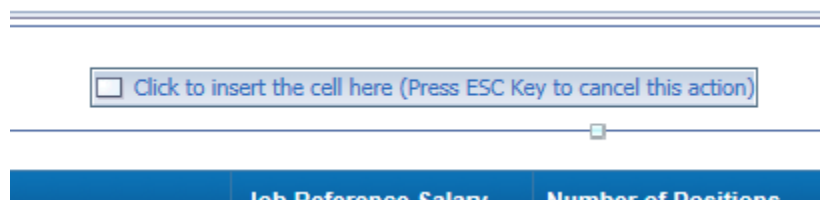


Job Reference Salary	Number of Positions
59,342	1

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



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



Job Reference Salary	Number of Positions
----------------------	---------------------

**NOTE:** You may need to increase the height of the Header by clicking on the node located at the bottom of the Header and dragging down.

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

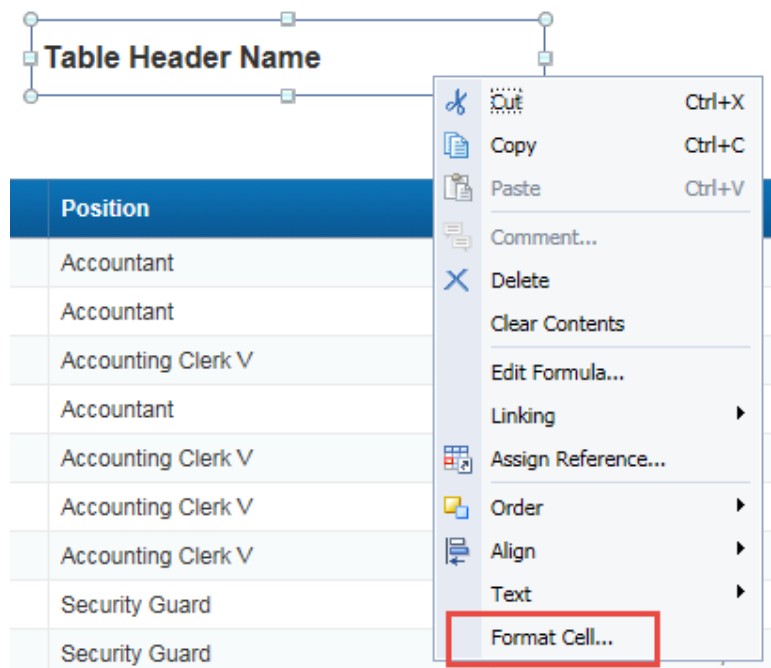


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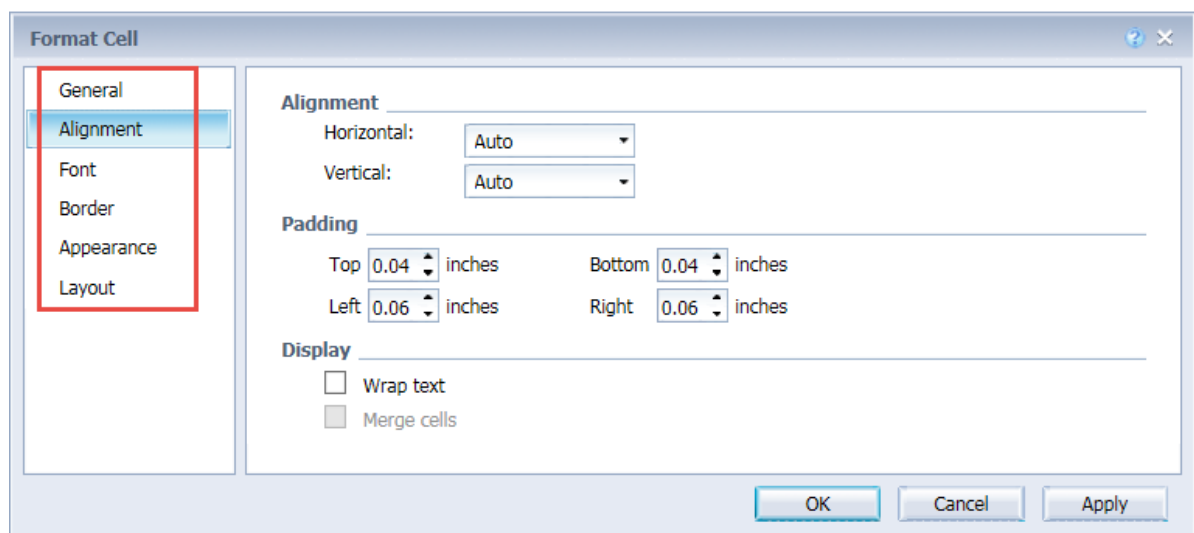
- Double click inside the blank cell and type the name you want to display in the Header. Press enter to display the name of your table.

### Table Header Name

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

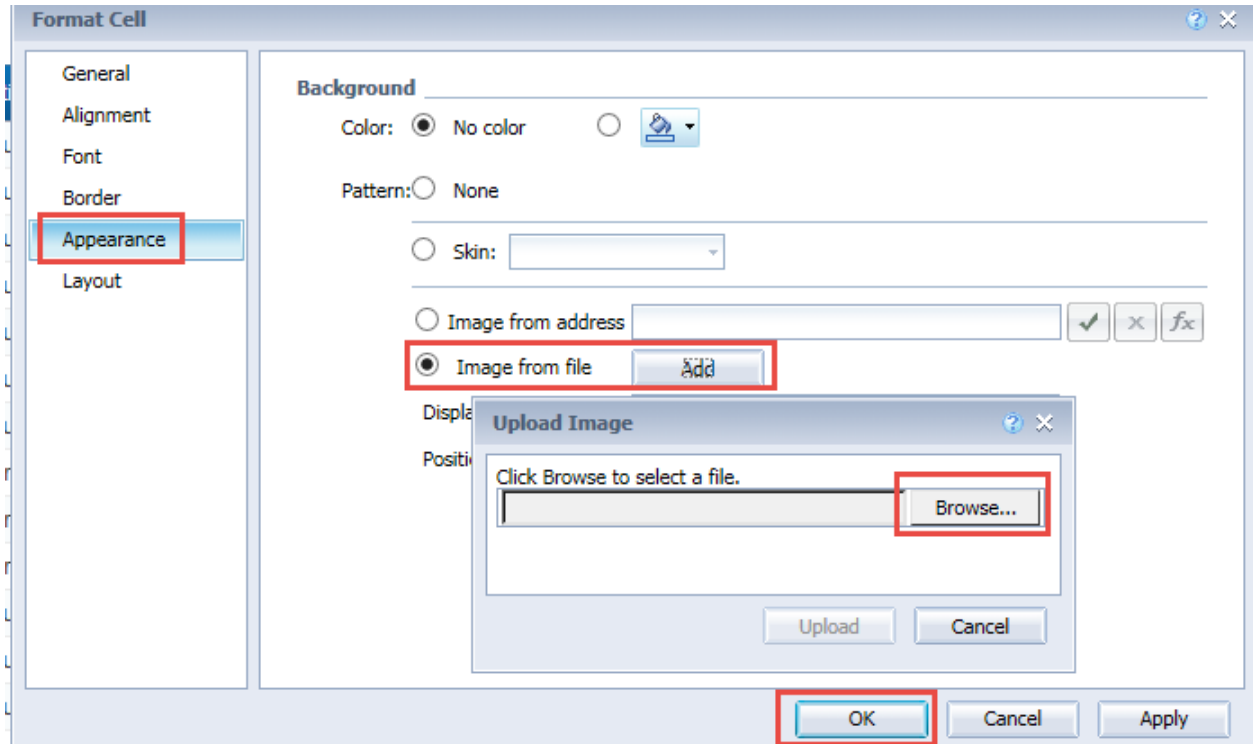


- You may change the General Size, Alignment, Font, Border, Appearance and Layout of the cell.





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



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



[B0165-T: Job Attributes w/o OrgUnit as of AUG 2017](#)

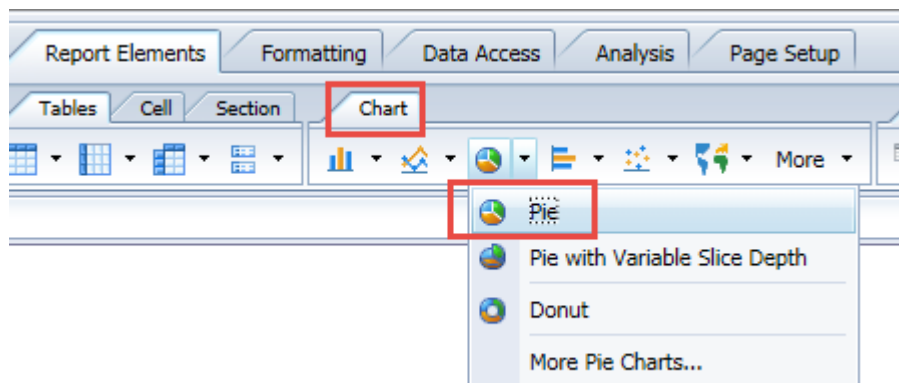
Execution Date: 8/15/17



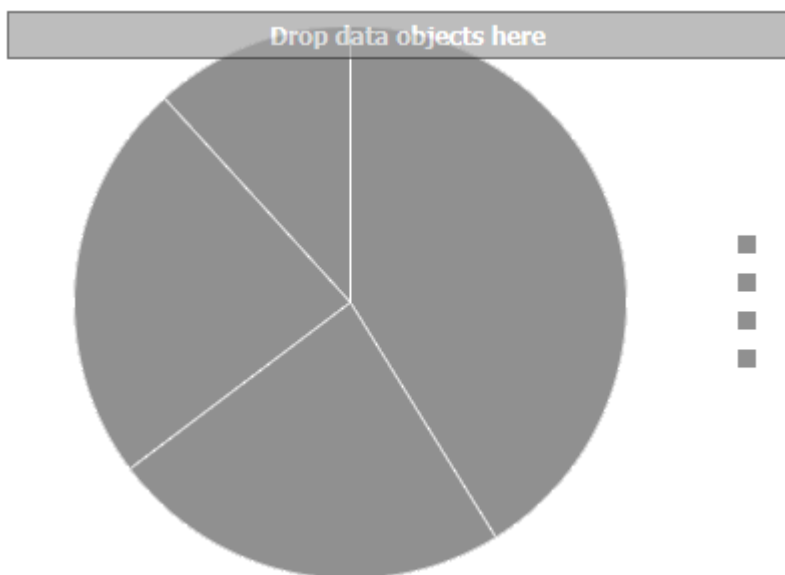
## Adding a Chart to Report

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

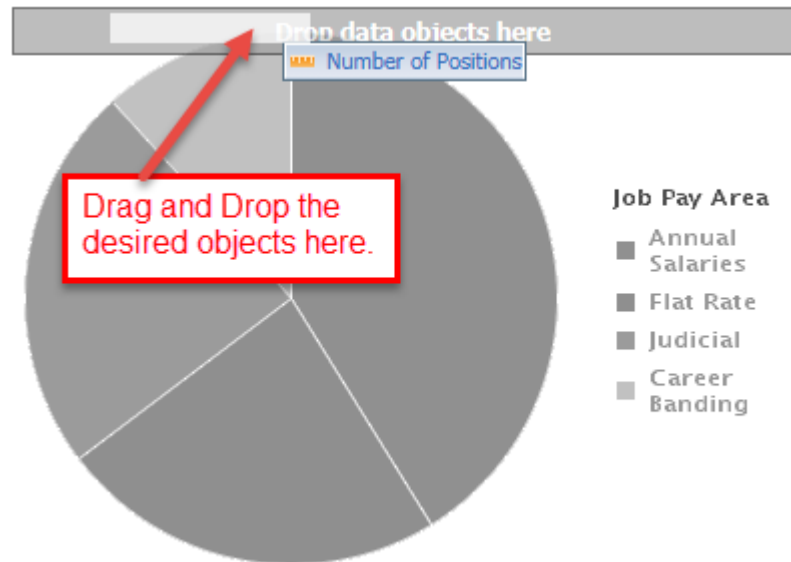
1. First add a new report tab to your report. In this exercise, rename the tab to read Chart.
2. Click on the Report Elements tab and then the Chart sub-tab. In this exercise, you will add a Pie Chart. Select the drop-down arrow beside the Pie Chart icon from the toolbar menu and select Pie.



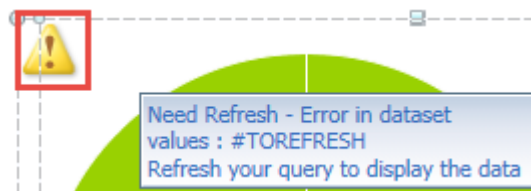
3. Click in the blank workspace to insert the Pie Chart into the report. The following object will appear. It is very important to click in the Workspace area below the Header section.



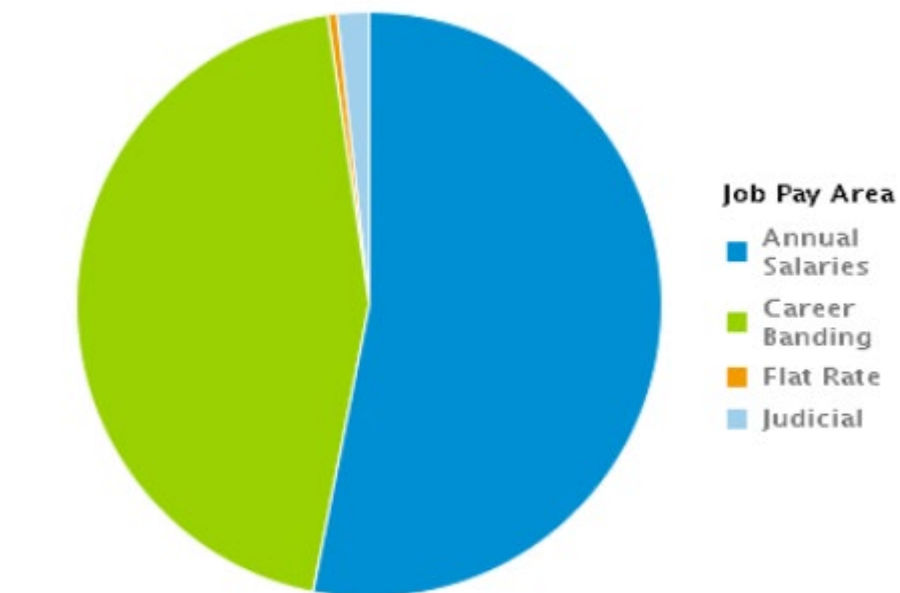
4. You must now choose the data you want to display in the chart. Open the Available Objects panel and drag and drop the desired objects directly onto the chart. Web Intelligence automatically determines how to display the data based on the chart type you selected. For this report, select Job Pay Area and Number of Positions.



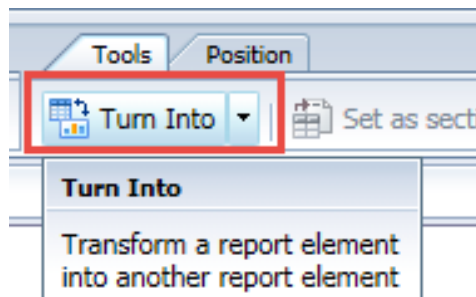
**NOTE:** You may have to click the refresh button to display the data in the chart.



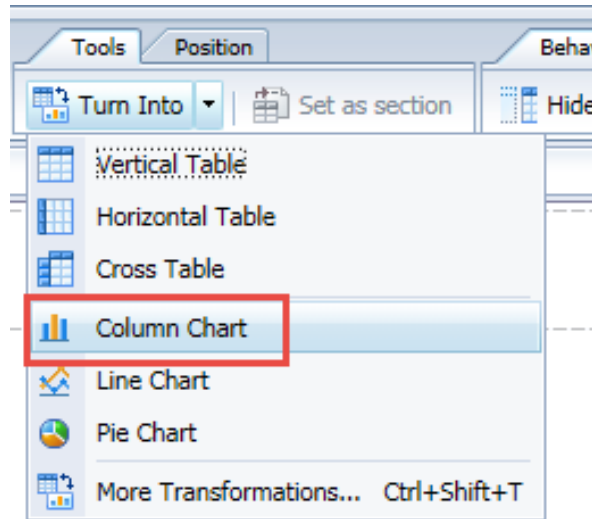
5. The chart now reflects the data you selected. For the objects, you selected in this exercise, you have determined that the Pie Chart is not the correct type of chart.



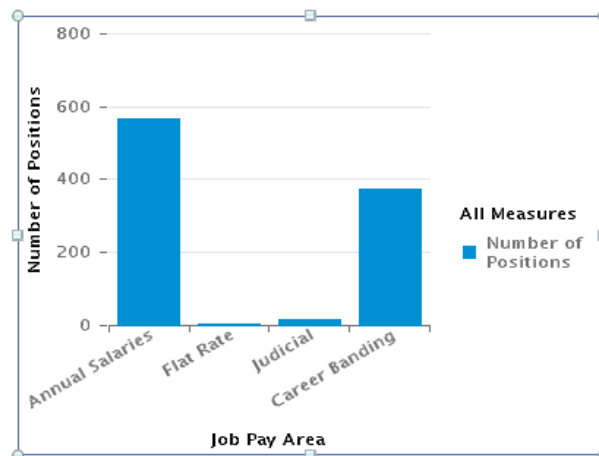
6. Web Intelligence allows you to convert the Pie Chart into another type of chart. Click on the Tools sub-tab located under the Report Elements tab, click on the drop-down arrow beside the Turn Into icon.




7. Select Column Chart for this exercise.



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

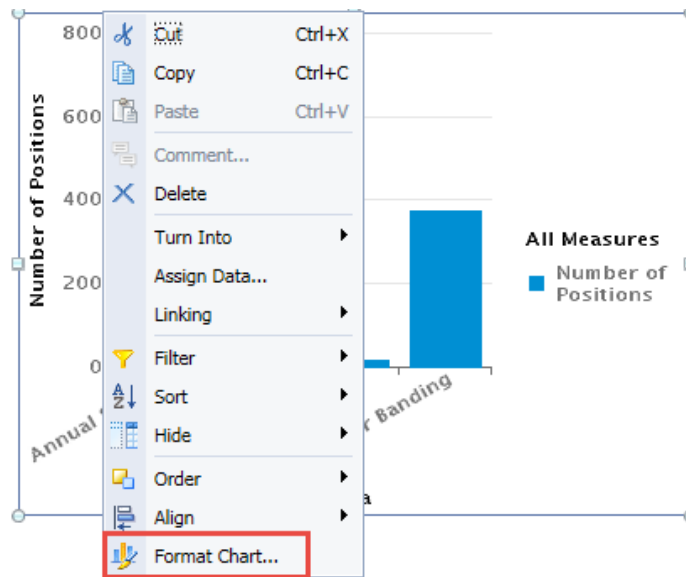


### *Adding a Title to a Chart*

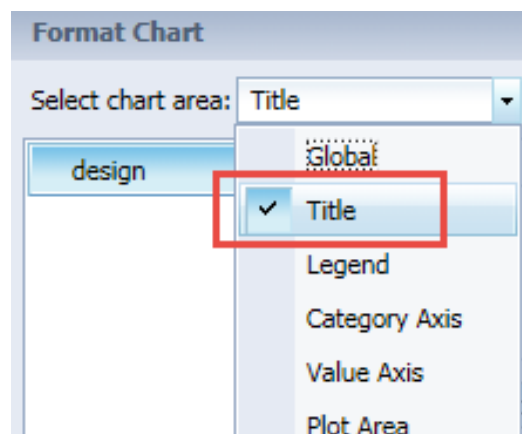
In Web Intelligence, you can add a title to a chart by using the Formatting tab, Chart Style sub-tab and clicking on the Format Chart icon . You can also right click and select Format Chart.

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

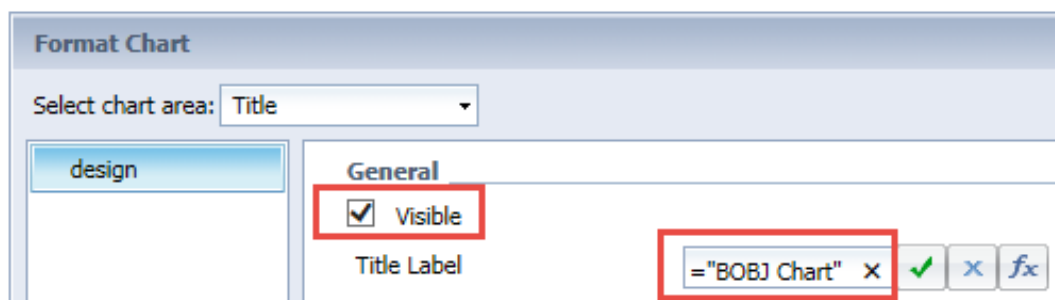
2. Once the chart has been selected, right click and select Format Chart.



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



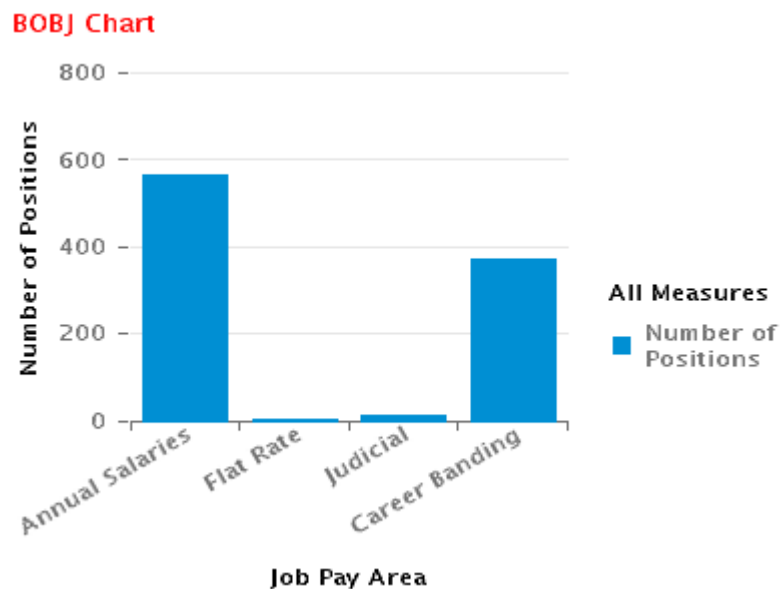
4. Click on Visible located in the General section so that a check mark appears in the box in front of the word Visible. Visible must be checked for the title to display on your chart.
5. Type your title between the quotations in the Title Label field. It is considered a formula; therefore, it is important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



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

The image shows the 'Format Chart' dialog box with the 'Title' chart area selected. The 'design' tab is active. The 'General' section includes a 'Visible' checkbox and a 'Title Label' field containing '="BOBJ Chart"'. The 'Layout' section, highlighted with a red box, includes 'Location' (Top, Bottom, Left, Right), 'Orientation' (Automatic, Vertical Lettering), 'Spacing' (2), and an 'Adjust Layout' checkbox. The 'Text' section, also highlighted with a red box, includes a font family dropdown (Arial), font size (9), bold/italic/underline buttons, a color picker, 'Horizontal Text Alignment' and 'Vertical Text Alignment' buttons, and a 'Text Policy' dropdown (No Wrap, Wrap, Truncate). The 'Border and Background' section, highlighted with a red box, includes 'Border Size' (None), 'Border Color' (RGBA Color selected), and 'Background Color' (RGBA Color selected), each with a color picker and a 0-100 slider. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom right.

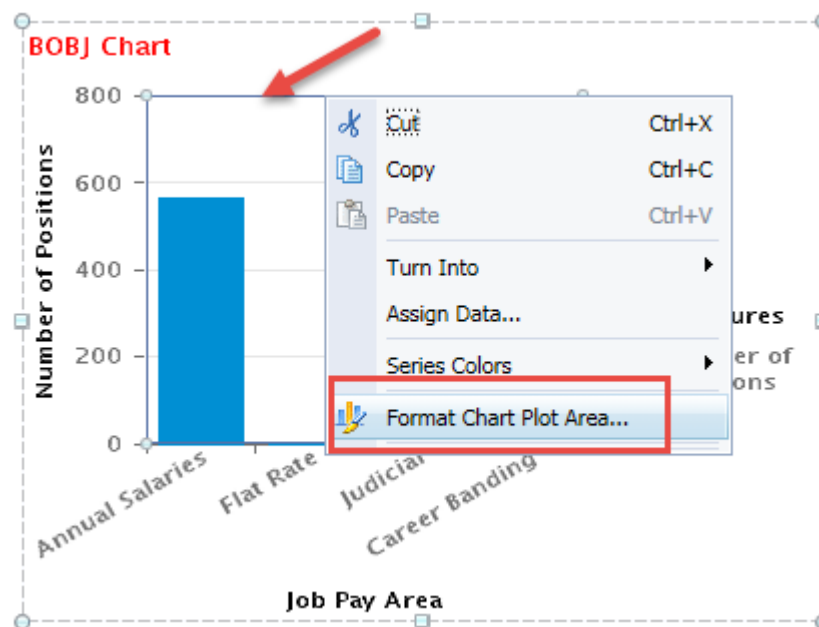
- Click Apply to see the title and make additional changes if necessary. Once you have completed the formatting, click OK.



### Formatting Chart Areas

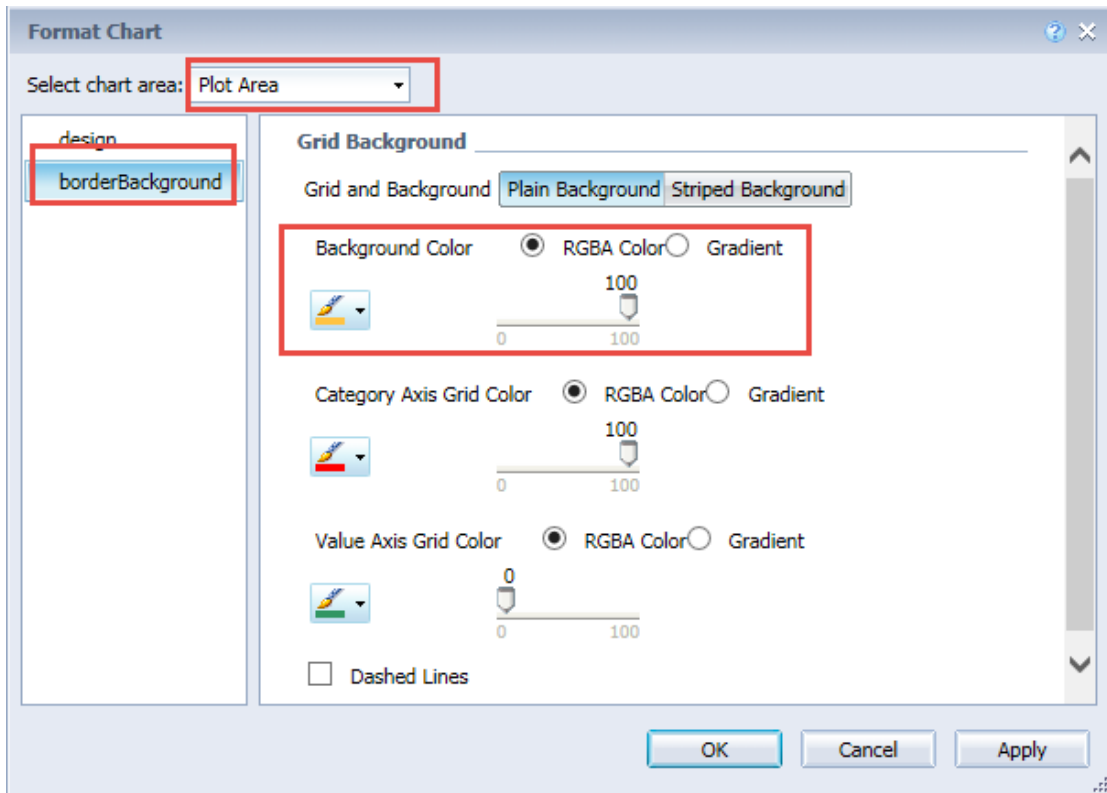
In Web Intelligence, you can format chart areas by right clicking on the chart plot area with the chart and select Format Chart Plot Area.

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

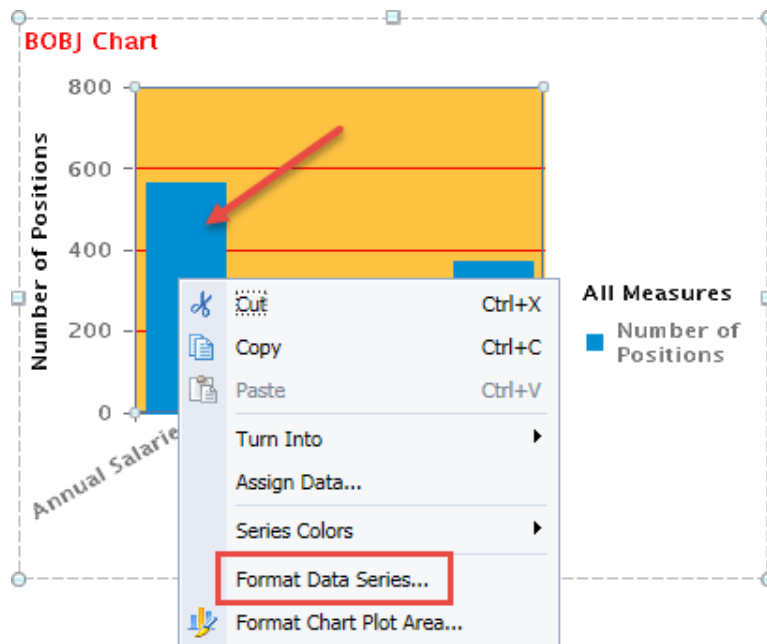




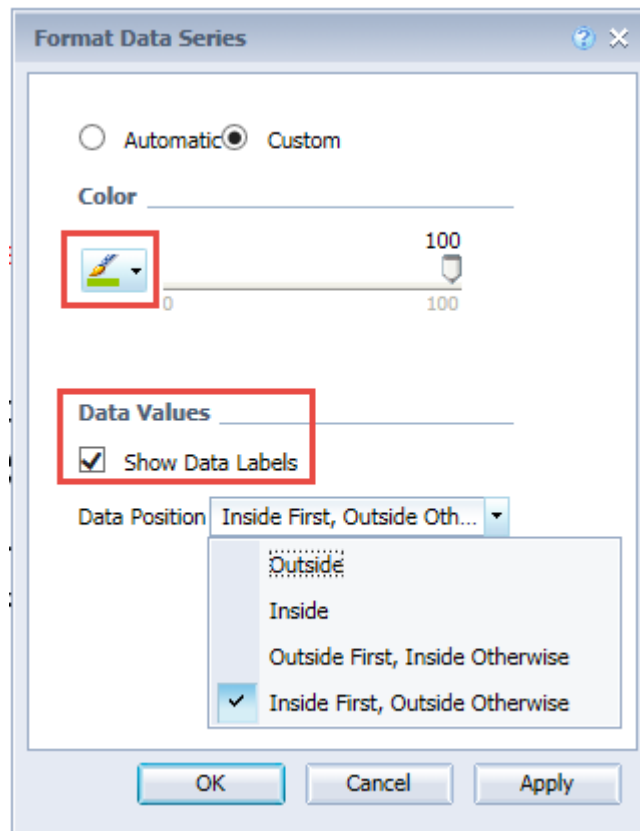
2. The Format Chart prompts box will display. Click on Background in the left side panel to change the background color(s) to the plot area.



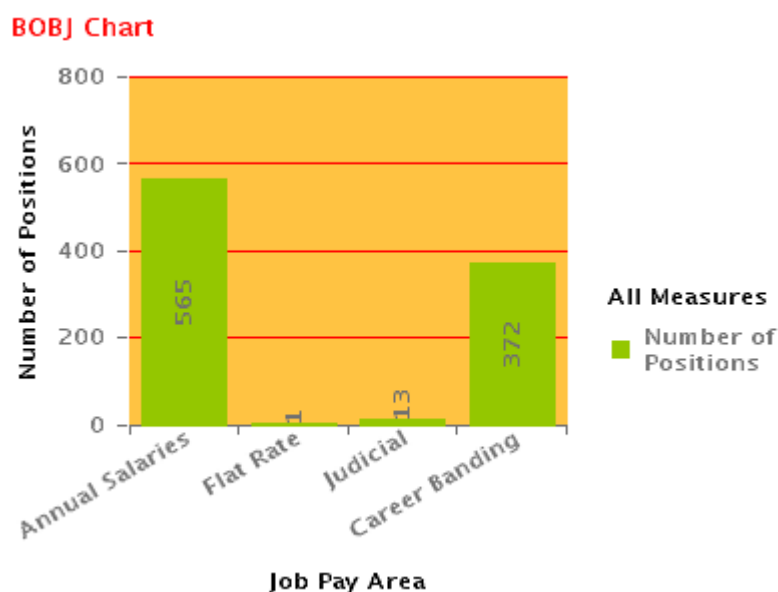
3. To format the Data Series, you must select the Data Series area, right click and select Format Data Series.



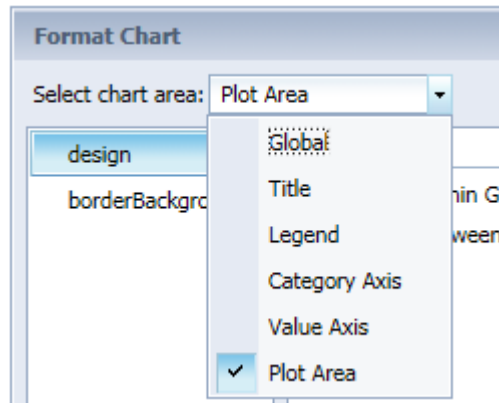
4. The Format Data Series prompts box will display. You can change data series to a custom color and/or select to show Data Labels.



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



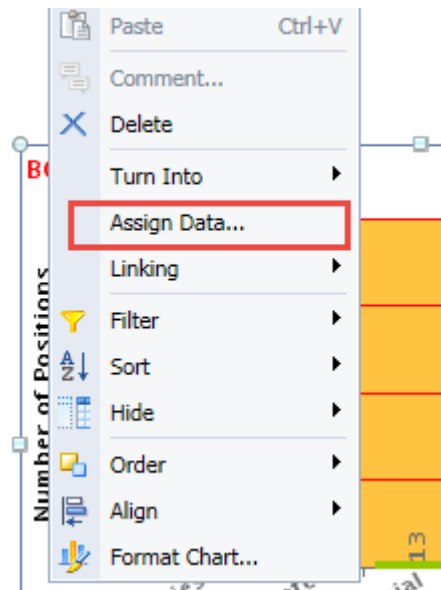
**NOTE:** All areas of the chart can be formatted by selecting the chart area from the drop-down menu in the Format Chart prompts box.



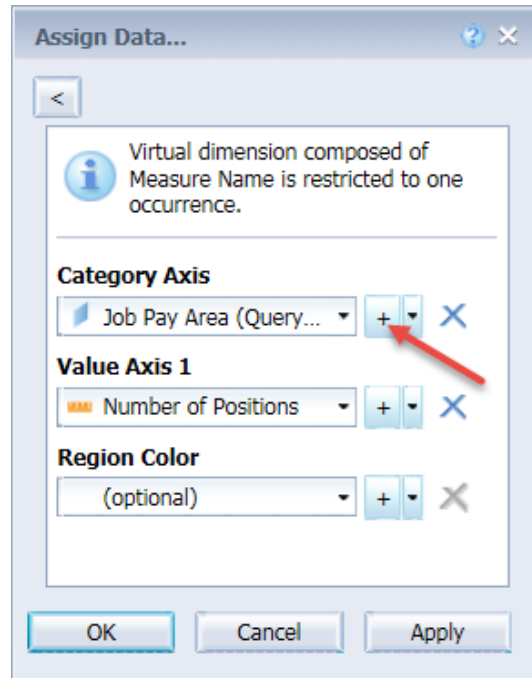
### Changing Data Objects in a Chart

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

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



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



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

## Filtering Data

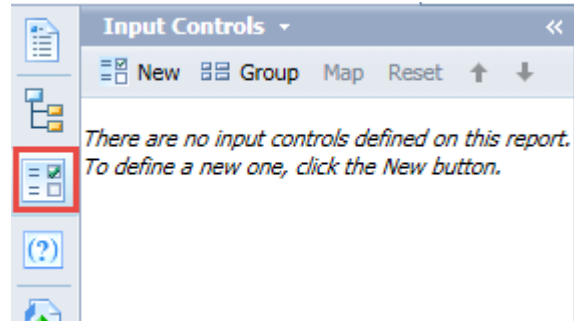
After running a query, you may decide that you want only certain data to be displayed in your report. The filters hide data that is visible in reports, charts, tables and graphs but the data is still available within the WEBI report structure. Once a report filter is removed, no additional data refreshes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

WEBI reports can be filtered using two methods:

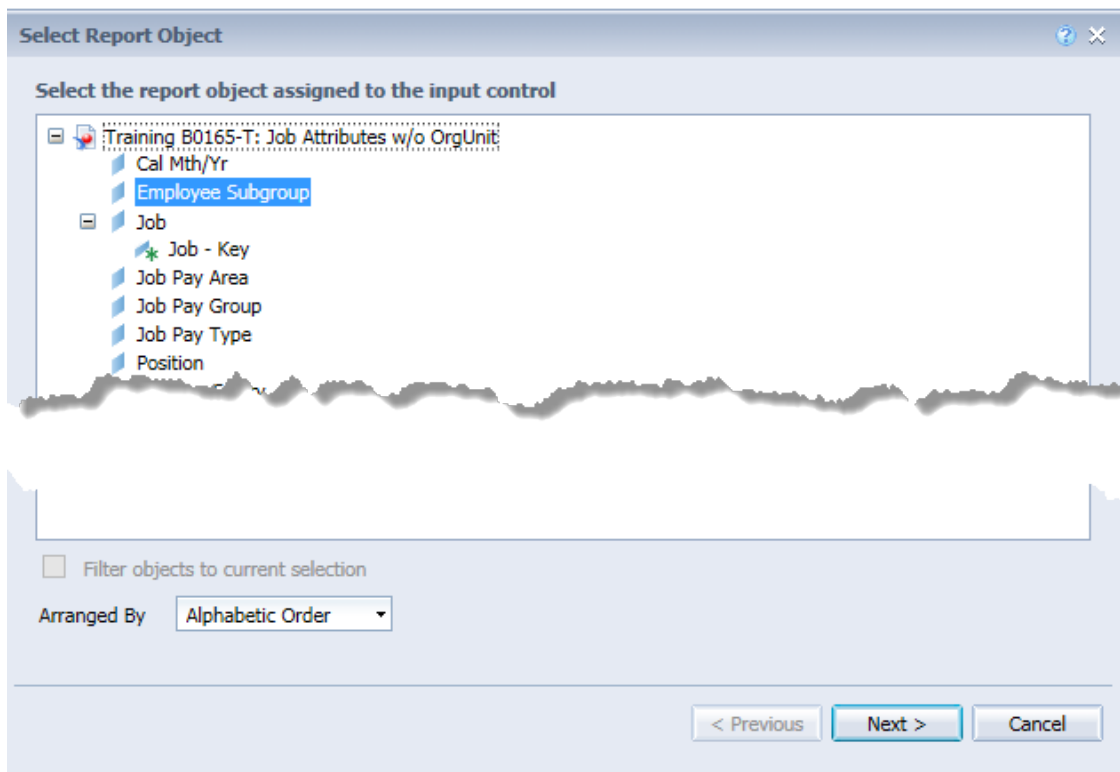
- **Filter Bar** - allows for the addition of multiple single value report filters on a report. This method is also available in WEBI Reading Mode. For details in using the Filter Bar, refer to the Toolbar Menu section within Lesson 5 - WEBI Reading Mode.
- **Input Controls** - provides a convenient,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

## Creating Input Controls using Dimensions

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



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



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

**Choose Control Type**

Select a control and its associated properties

**Simple Selection**

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

**Multiple Selections**

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

**Input Control Properties**

Radio buttons: Select a value from a list via radio buttons. Every possible value is displayed.

Control type: Radio buttons

Name: Employee Subgroup

Description:

List of values: From report

Use restricted List of Values: ☐ Yes

Allow selection of all values: ☒ Yes

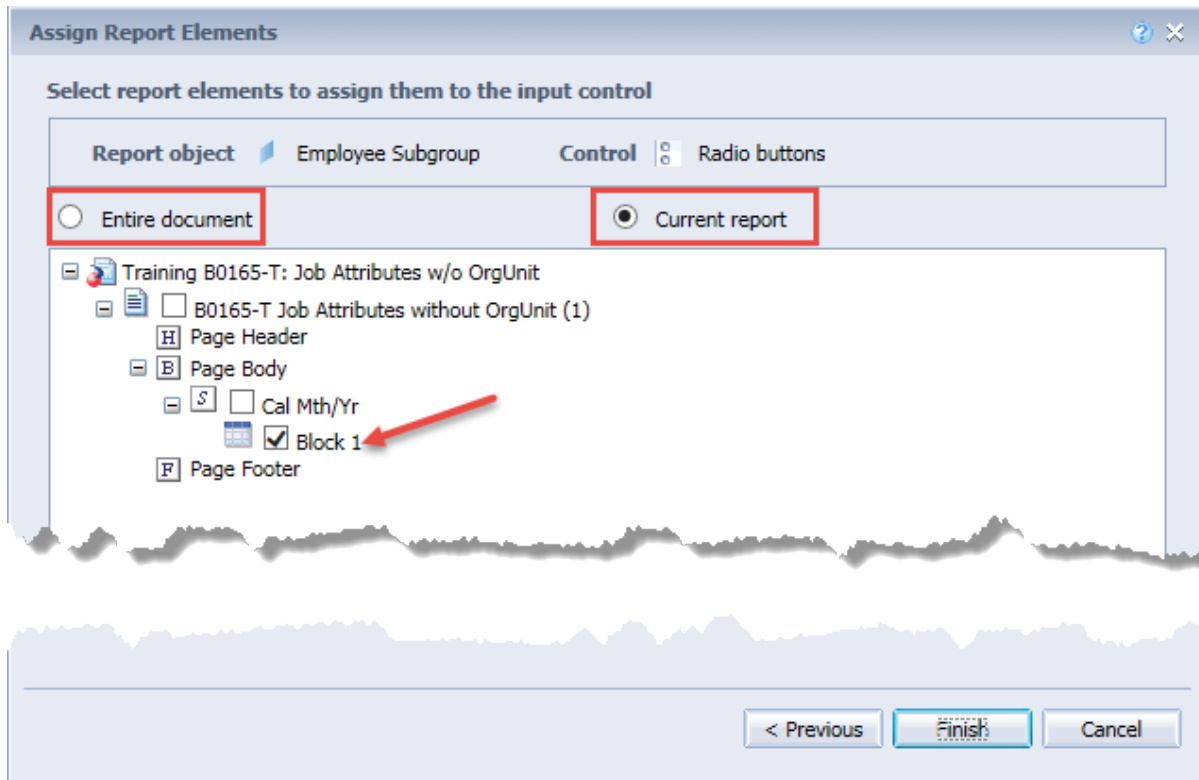
Allow selection of null values: ☐ Yes

Default value(s):

< Previous   Next >   Cancel

- Simple Selection:** allows you to select one value from a list of possible values.
  - Multiple Sections:** allows you to select several values from a list of possible values.
- Click **Next** to display the Assign Report Elements prompt.

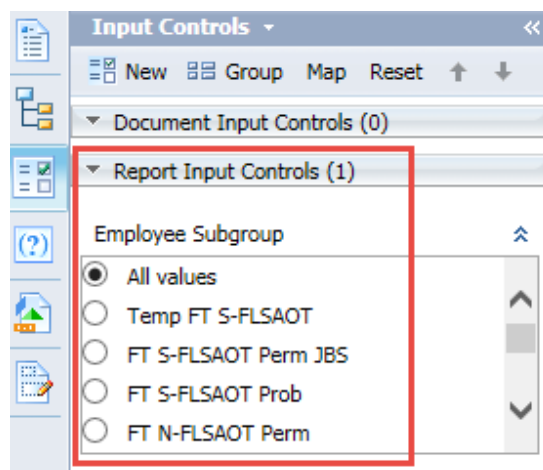
Input controls can be applied to the entire document, not just a single report. This is helpful where there are multiple reports that need to be filtered in a single document. Applying an input control to all reports allows global control of the data displayed in elements like tables, charts, and sections. To apply the input controls to the entire document, click on the **Entire document** option on the Assign Report Elements prompt.



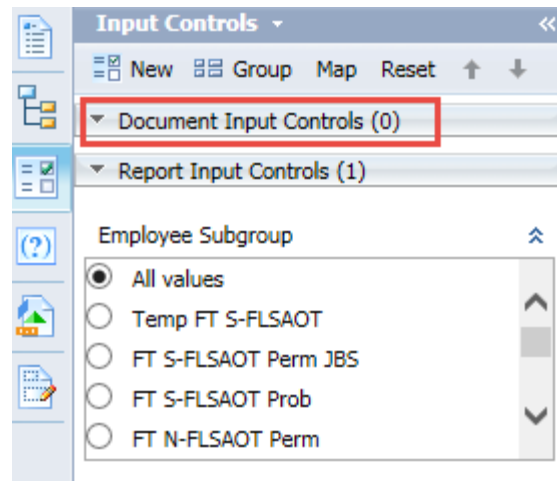
Input Controls can be associated with the report elements such as Page or Section Headers, Page Body or Page Footers. In this exercise the value you are filtering on is included in Block 1.

6. Click Finish

- Report Input controls.



- Document Input controls.



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

Report Input Controls (1)

Employee Subgroup

- ☐ FT N-FLSAOT Perm
- ☐ FT EPA
- ☐ FT N-FLSAOT Perm JBS
- ☒ FT S-FLSAOT Perm
- ☐ FT S-FLSAOT TL

**JUL 2017**

Job	Job Desc	Employee Subgroup	Job Pay Type
30000315	Accounting Clerk III	FT S-FLSAOT Perm	Grade
30000318	Accounting Clerk IV	FT S-FLSAOT Perm	Grade
30000319	Accounting Clerk V	FT S-FLSAOT Perm	Grade
30000325	Accounting Clerk Supervisor V	FT S-FLSAOT Perm	Grade

You may have multiple input controls within a report.

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



**Choose Control Type**

Select a control and its associated properties

**Simple Selection**

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

**Multiple Selections**

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

**Input Control Properties**

List box: Select several values from a scrollable list.

Control type: List box

Name: Job Pay Type

Description:

List of values: From report

Use restricted List of Values: ☐ Yes

Allow selection of all values: ☒ Yes

Allow selection of null values: ☐ Yes

Default value(s):

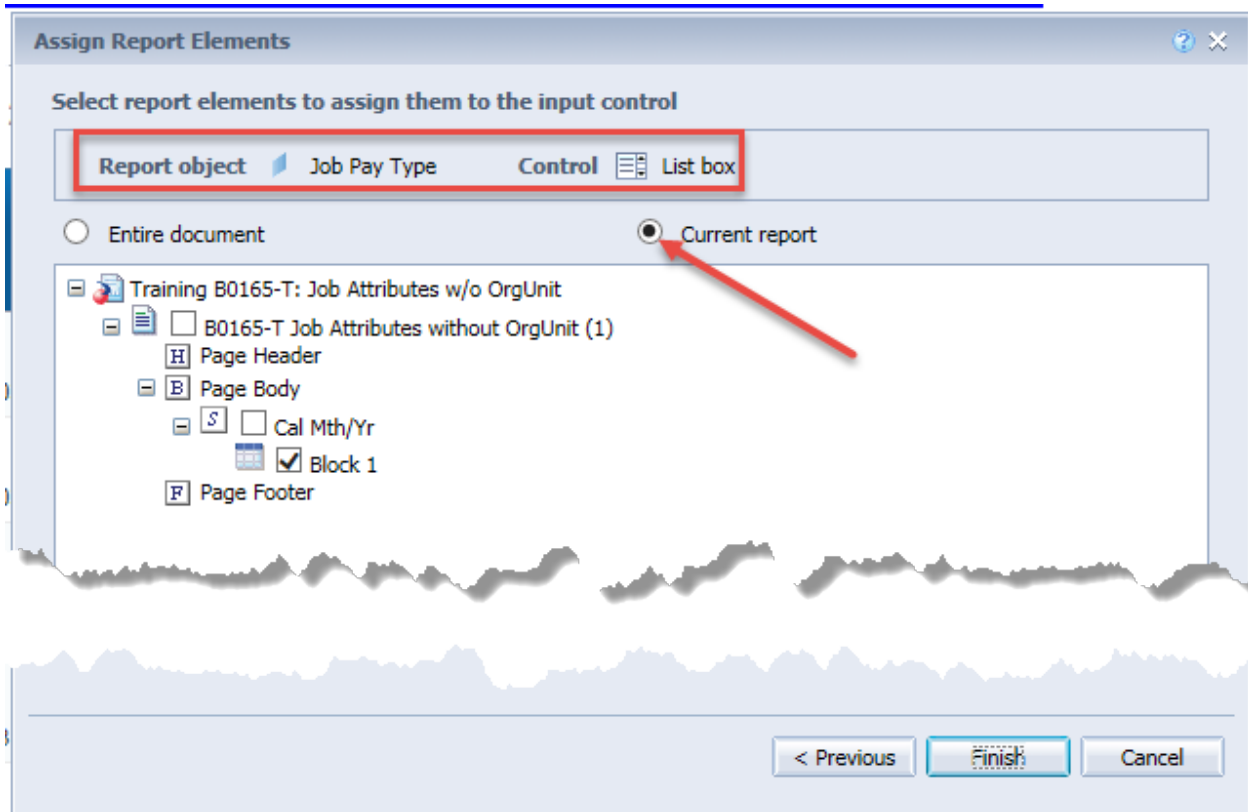
Filter operators: In List

Number of line(s): 5

< Previous   Next >   Cancel

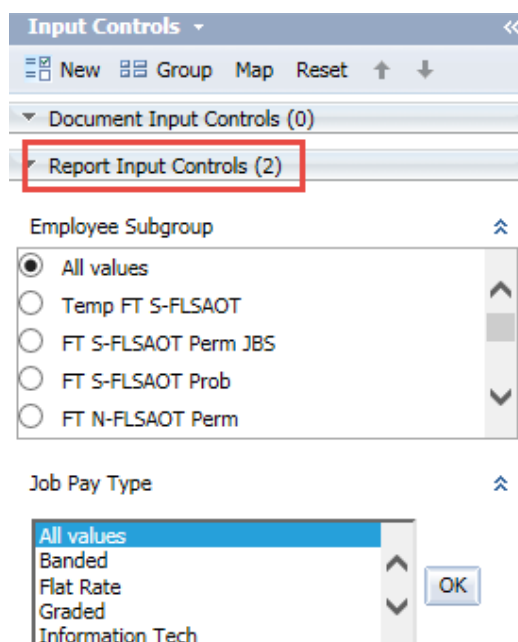
11. Click **Next** to display the Assign Report Elements prompt.

**NOTE:** Remember, input controls can be applied to the current report or to the whole document.

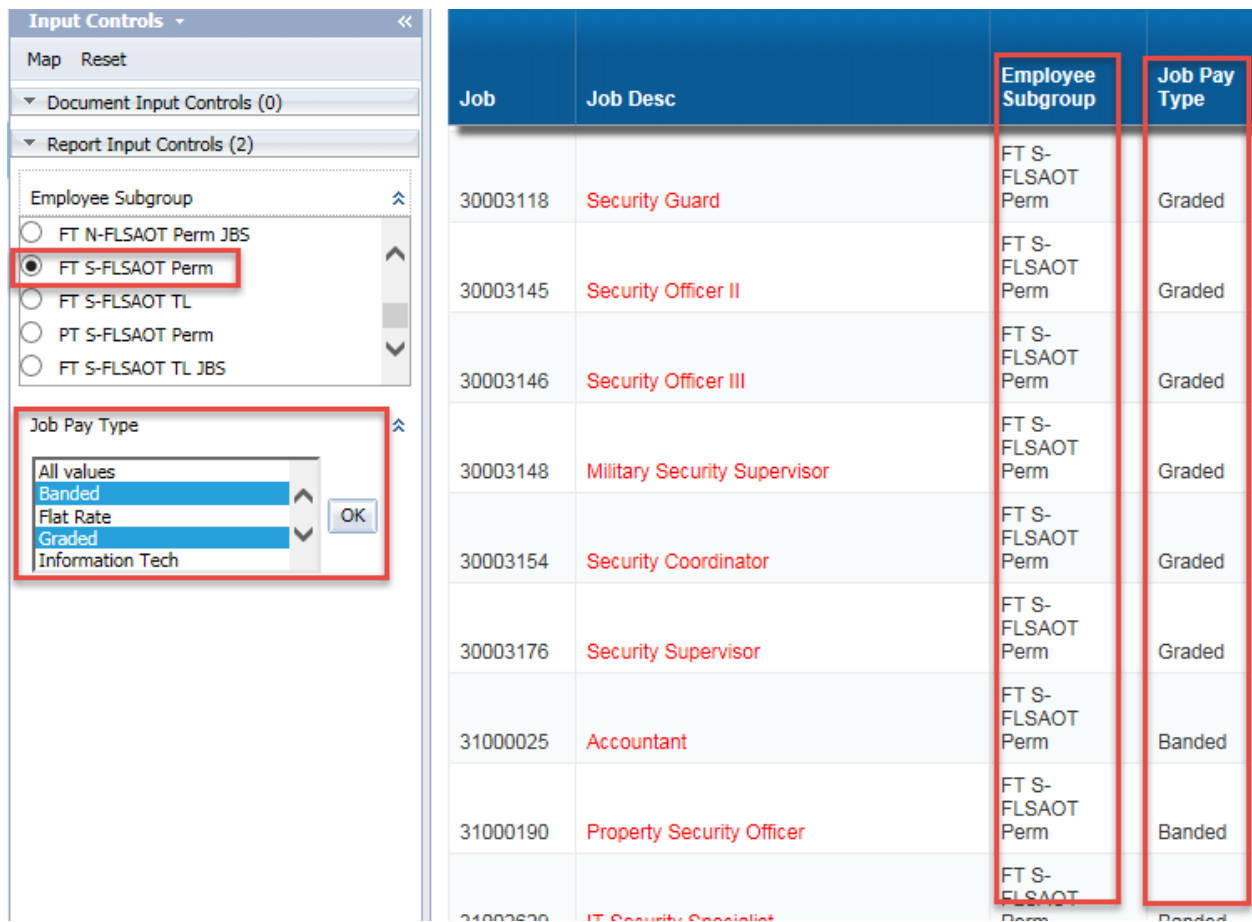


Input Controls can be associated with the report elements such as Page or Section Headers, Page Body or Page Footers. In this exercise, the value you are filtering on is included in Block 1.

12. Click Finish.



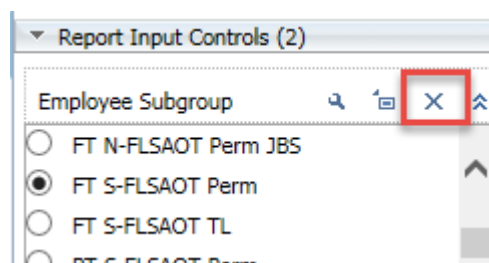
13. Selecting of one or more values in the Input Control selection and pressing OK will result in applying the filter criteria to the result in the report. In the example below, Graded and Banded are selected in the second filter. The first filter on Employee Subgroup remains as FT S-FLSAOT Perm.



The screenshot shows the 'Input Controls' panel on the left and a report table on the right. In the 'Input Controls' panel, under 'Report Input Controls (2)', the 'Employee Subgroup' filter has 'FT S-FLSAOT Perm' selected. The 'Job Pay Type' filter has 'Banded' and 'Graded' selected. The 'OK' button is visible. The report table on the right has columns: Job, Job Desc, Employee Subgroup, and Job Pay Type. The table contains 10 rows of data, all of which are 'Graded' or 'Banded' and belong to the 'FT S-FLSAOT Perm' subgroup.

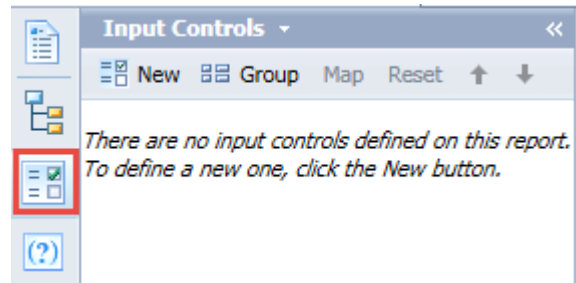
Job	Job Desc	Employee Subgroup	Job Pay Type
30003118	Security Guard	FT S-FLSAOT Perm	Graded
30003145	Security Officer II	FT S-FLSAOT Perm	Graded
30003146	Security Officer III	FT S-FLSAOT Perm	Graded
30003148	Military Security Supervisor	FT S-FLSAOT Perm	Graded
30003154	Security Coordinator	FT S-FLSAOT Perm	Graded
30003176	Security Supervisor	FT S-FLSAOT Perm	Graded
31000025	Accountant	FT S-FLSAOT Perm	Banded
31000190	Property Security Officer	FT S-FLSAOT Perm	Banded
31000220	IT Security Specialist	FT S-FLSAOT Perm	Banded

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

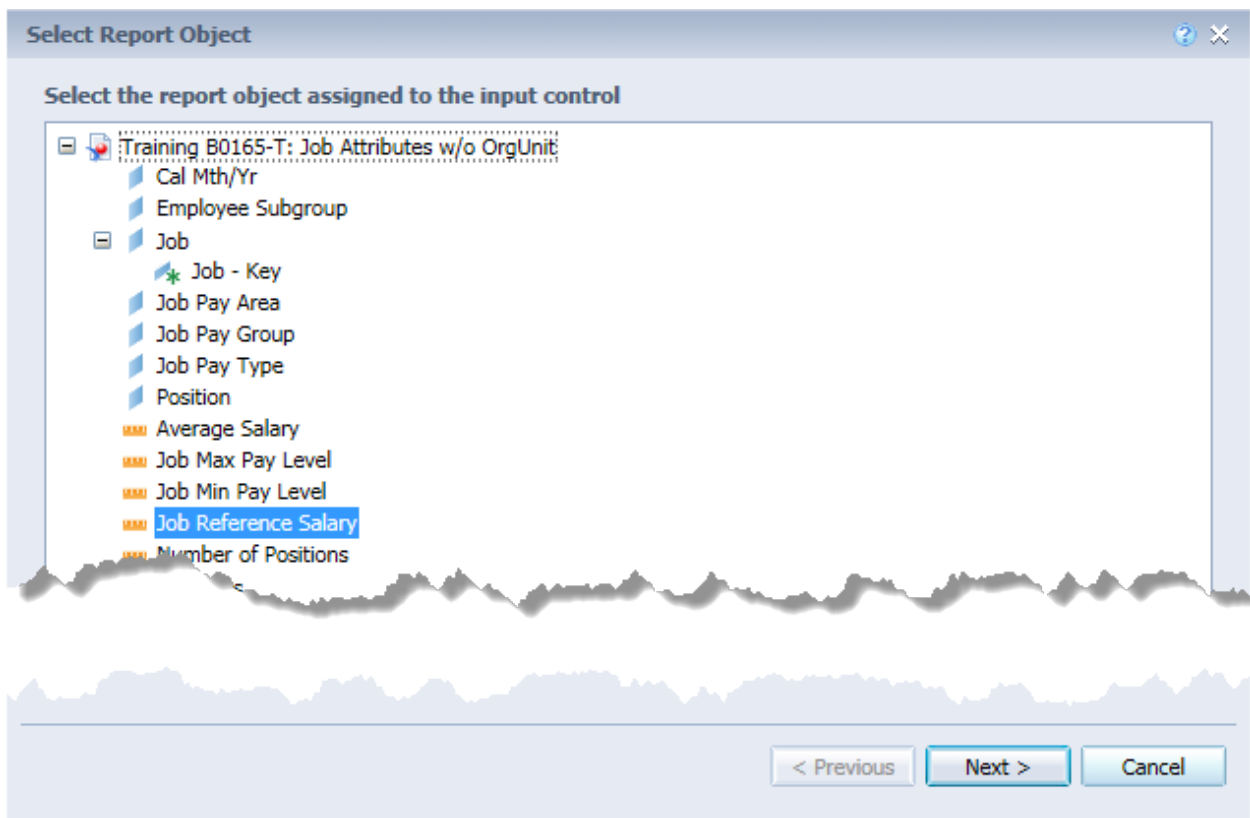


## Creating Input Controls using Measures

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



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



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

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

**Choose Control Type**

Select a control and its associated properties

**Simple Selection**

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

**Multiple Selections**

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

**Input Control Properties**

Double slider: Enter two values and use a slider to increment or decrement it. You must declare default values and interval bounds.

Control type: Double slider

Name: Job Reference Salary

Description:

Min value:

Max value:

Increment: 1

Default value(s):

Min value:

Max value:

Filter operators: Between

Missing: Default value(s), Min value, Max value

< Previous Next > Cancel

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

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

**Choose Control Type**

Select a control and its associated properties

**Simple Selection**

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

**Multiple Selections**

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

**Input Control Properties**

Double slider: Enter two values and use a slider to increment or decrement it. You must declare default values and interval bounds.

Control type: Double slider

Name: Job Reference Salary

Description:

Min value: 30000

Max value: 120000

Increment: 10000

Default value(s)

Min value: 30000

Max value: 120000

Filter operators: Between

< Previous Next > Cancel

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

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

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

The screenshot shows the 'Input Controls' pane on the left. Under 'Report Input Controls (1)', there is a 'Job Reference Salary' control with a double slider. The slider is positioned at 120,000, with a minimum value of 30,000 and a maximum value of 120,000. The report area displays a table with the following data:

Employee Subgroup	Job Pay Type	Job Pay	Job Max Pay Level	Job Sal Ref	Ave Salary
FT S-FLSAOT Perm	Graded	Annual	38,973	31,396	
FT S-FLSAOT Perm	Graded	Annual	41,827	33,619	33,619
FT S-FLSAOT TL	Graded	Annual	41,827	33,619	

The 'Job Reference Salary' input control is set to 120,000, which is reflected in the 'Job Sal Ref' column of the report table.

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

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

The screenshot shows the 'Input Controls' pane on the left. Under 'Report Input Controls (1)', there is a 'Job Reference Salary' control with a double slider. The slider is positioned at 90,000, with a minimum value of 50,000 and a maximum value of 120,000. The report area displays a table with the following data:

Employee Subgroup	Job Pay Type	Job Pay	Job Max Pay Level	Job Sal Ref	Average Salary
FT N-FLSAOT Perm	Graded	Annual	93,142	72,833	80,142
FT N-FLSAOT Perm	Graded	Annual	93,142	72,833	80,142
FT N-FLSAOT Perm	Graded	Annual	74,431	58,346	56,142

The 'Job Reference Salary' input control is set to 90,000, which is reflected in the 'Job Sal Ref' column of the report table.

## Creating Sections and Breaks

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

## Creating a Section

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

**PROCESS NOTE:** Remember it is good practice to first make a duplicate of the original report tab before making major modifications. This way, if the changes don't work, you still have the original version of the report in a separate tab.

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

Job	Job Desc	Emp Sub
30000315	Accounting Clerk III	FT S FLSA Perm
30000318	Accounting Clerk IV	FT S FLSA Perm
30000318	Accounting Clerk IV	FT S FLSA

- Merge
- Clear Contents
- Set as section**
- Turn Into
- Edit Formula...
- Linking
- Assign Reference...
- Group
- Filter



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

#### FT N-FLSAOT Perm JBS

Job	Job Desc	Job Pay Type	Job Pay Ar
30012947	Accountant	Graded	Judicial
31004025	Chief Information Security Officer	Graded	Judicial
32001888	Network Security Specialist	Graded	Judicial

#### FT S-FLSAOT Perm JBS

Job	Job Desc	Job Pay Type	Job Pay Ar
30013040	AOC Division Assistant	Graded	Judicial

#### FT S-FLSAOT TL JBS

Job	Job Desc	Job Pay Type	Job Pay Ar
-----	----------	--------------	------------

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

FT N-FLSAOT Perm

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions
30001067	Employment Security Regional Manager	Graded	Annual Salaries	GR78	
30001091	Employment Security Manager (C & R)	Graded	Annual Salaries	GR78	
30001400	Employment Security Manager	Graded	Annual Salaries	GR78	

## Creating a Break

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

Breaks offer the following advantages:

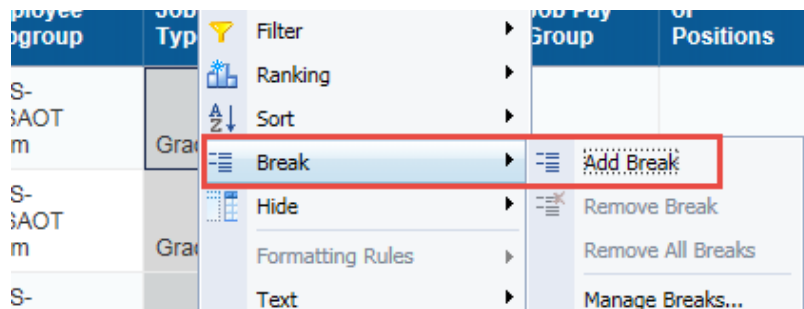
- You can more efficiently organize how your data is represented.
- You can display subtotals.
- You can display sub-aggregations.

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

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

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

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



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

	Employee Subgroup	Job Pay Type	Job Pay Area
urity	FT EPA	Flat Rate	Flat Rate
nator	FT S-FLSAOT TL		
	JBS		Judicial
		Flat Rate	

	Employee Subgroup	Job Pay Type	Job Pay Area
	FT N-FLSAOT Perm	T-Grade	Annual Salaries
cer	FT S-FLSAOT Perm		Annual Salaries
		T-Grade	

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

## Calculating Totals and Subtotals

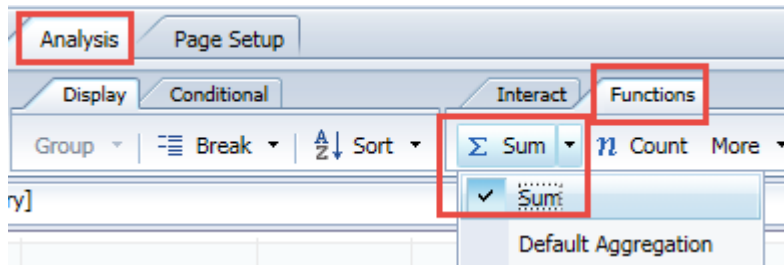
Web Intelligence calculations enable you to quickly add information to your report. You can sum the values in a column, count the number of values in a column, and display averages and percentages. Many of the calculations only work with numeric data. The type of data determines which calculation functions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

The following table shows the available calculations and data types:

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

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

1. Select the report tab with the Sections and Breaks.
2. Highlight the column you want to calculate the sum. In this exercise, select the Job Salary Reference column.
3. Click on the Analysis tab and select Sum from the drop down beside Sum in the Functions sub-tab.



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

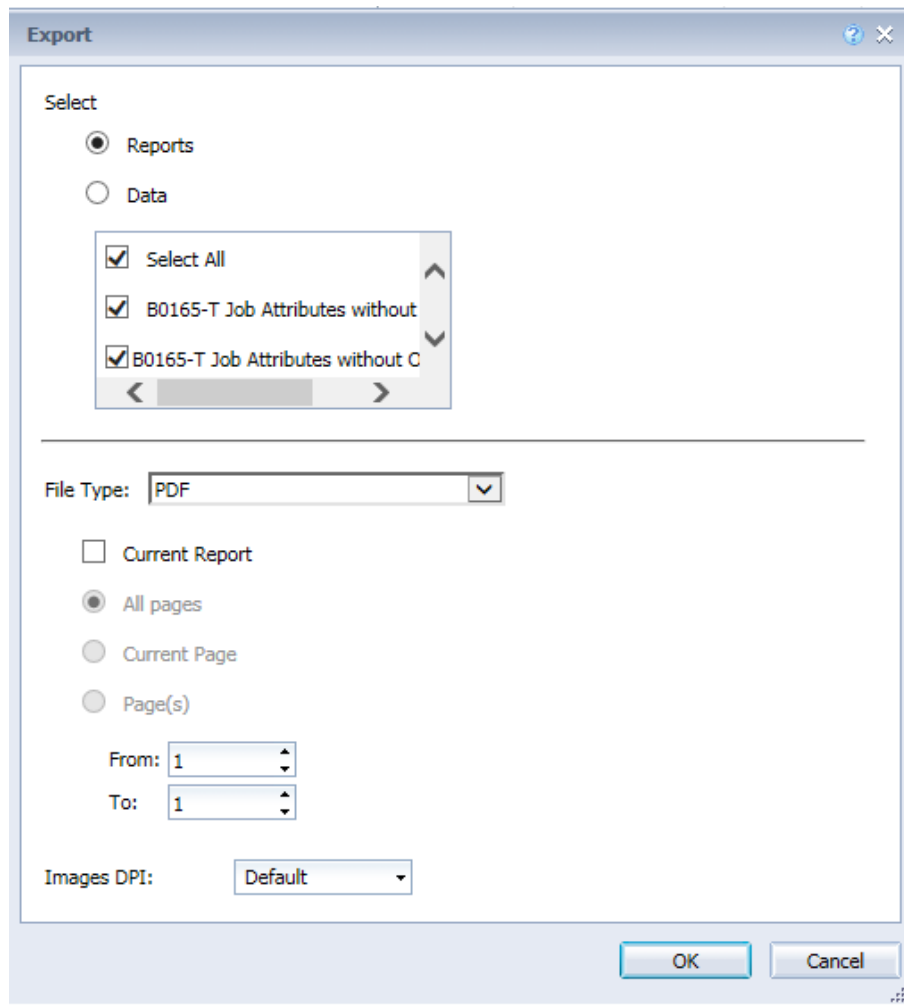
[illegible]

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

## Exporting the report

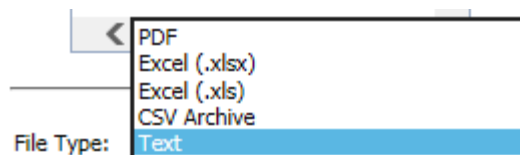
A report can be exported to another application for sharing or manipulating.

1. Click on the Export icon from the tool bar menu to display the Export options.

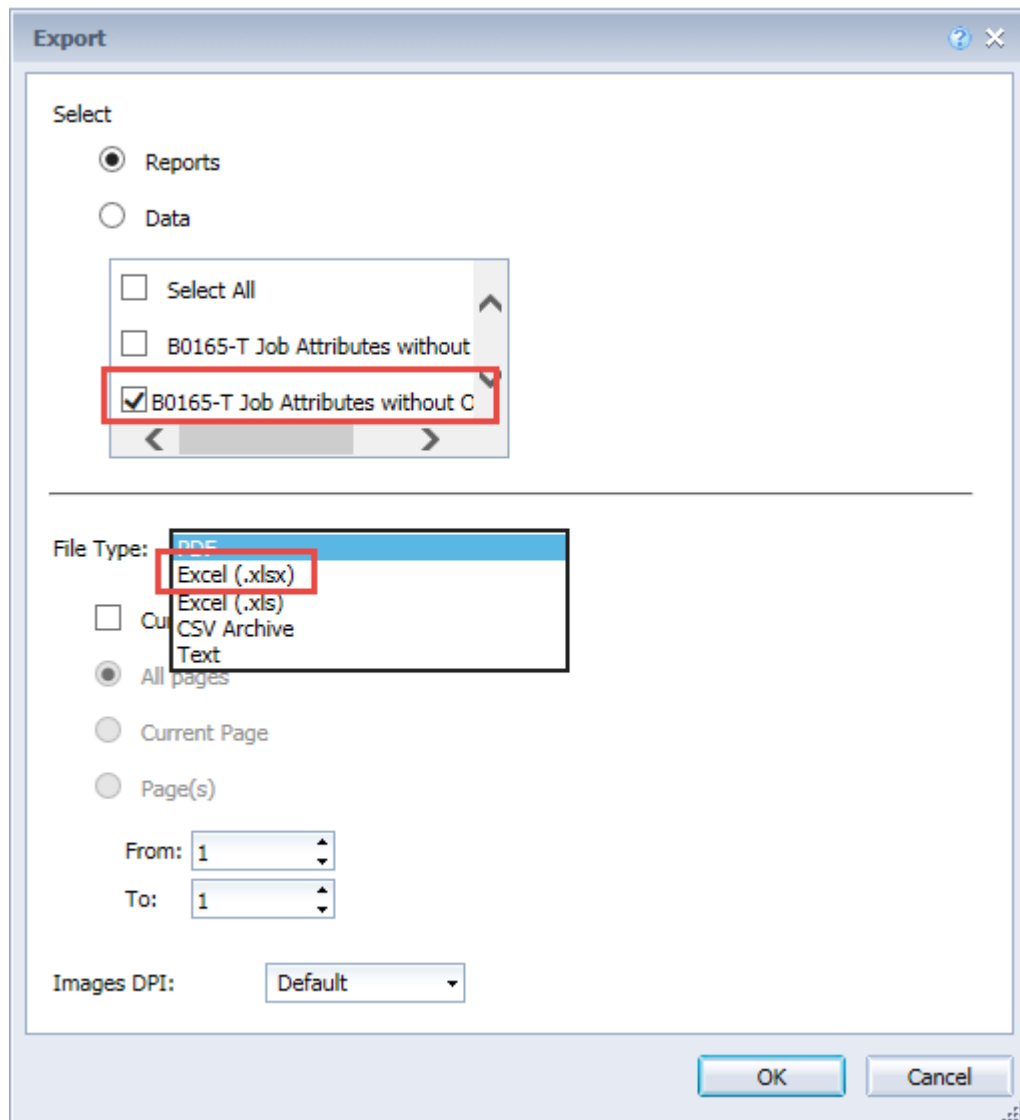


There are multiple options to select when exporting.

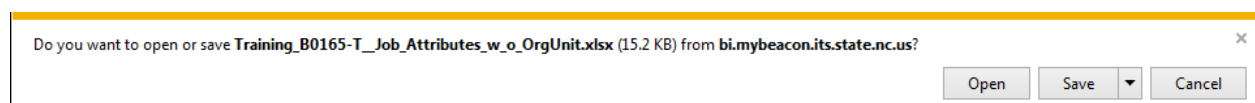
- **Reports** - this allows you to export all reports in the document or select specific reports to export if you have added additional reports to the original. You can export them all into separate tabs in an Excel workbook. File Types available to select when exporting:



- **Data** – this allows you to export the data in the report as a Comma Separated Value (CSV).
2. Select the second report tab (duplicated report) - For this exercise you will choose Excel (.xlsx) from the File Type menu and click OK.



3. You will be asked to either Open or Save the File Download. Select Open. The option you see will depend on which version of MS Office is being used.



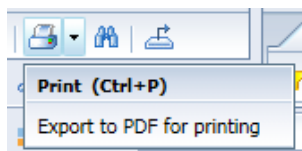
4. Your report will be exported to Excel where you can save the file for later manipulation and use.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Level	Job Max Pay Level	Job Sal Ref	Average Salary	10% Inc
30001067	Employment Security Regional Manager	Graded	Annual Salaries	GR78	8	54,887	93,142	72,833	80774.625	
30001091	Employment Security Manager (C & R)		Annual Salaries	GR78	2	54,887	93,142	72,833	77031	
30001100	Employment Security Manager I		Annual Salaries	GR73	17	44,347	74,431	58,346	56690.5385	
30001101	Employment Security Manager II		Annual Salaries	GR75	32	48,195	81,392	63,699	59800.5517	
30001102	Employment Security Manager III		Annual Salaries	GR77	12	52,551	89,008	69,629	66503.4	
30003122	Military Security Assistant Chief		Annual Salaries	GR68	1	36,761	59,876	47,384	46644	
30003161	Zoo Security Chief		Annual Salaries	GR62	1	29,826	46,775	37,462	36056	
30003247	Chief Of Security (DOP)		Annual Salaries	GR77	2	52,551	89,008	69,629	63780	
		Graded					Sum:	491,815		

## Printing the Report

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

1. Click on the Print icon on the toolbar menu:



2. Click on Open from the File Download box.



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

File Edit View Window Help

Home Tools Training\_B0165-T\_... x

100%

1 / 146

[Training B0165-T: Job Attributes w/o OrgUnit as of JUL 2017](#)

JUL 2017

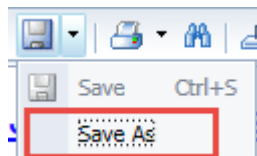
Job	Job Desc	Employee Subgroup	Job Pay Type	Job Pay Area	Job Pay Group	Number of Positions	Job Min Pay Lev
30000315	Accounting Clerk III	FT S-FLSAOT Perm	Graded	Annual Salaries	GR57	2	25,
30000318	Accounting Clerk IV	FT S-FLSAOT Perm	Graded	Annual Salaries	GR59	65	27,
30000318	Accounting Clerk IV	FT S-FLSAOT TL	Graded	Annual Salaries	GR59	3	27,
		FT S-					

## Save As

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

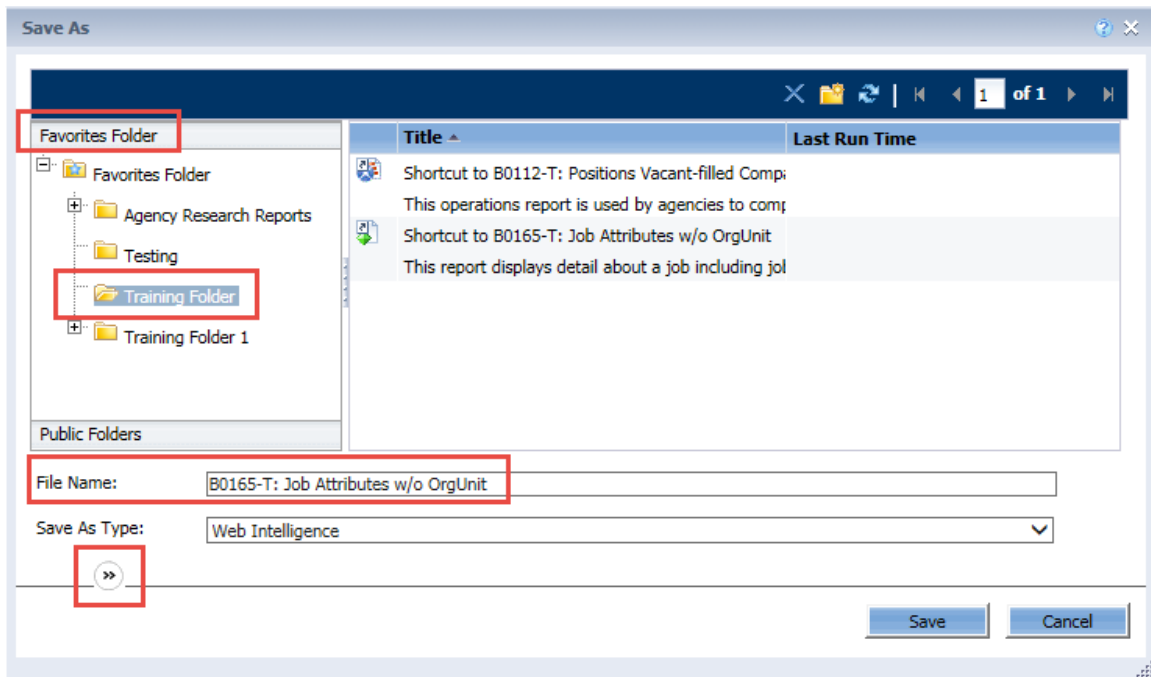
By Default, data refreshes each time the report is opened.

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





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



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

**Save As**

1 of 1

**Favorites Folder**

- Favorites Folder
  - Agency Research Reports
  - Testing
  - Training Folder
  - Training Folder 1

**Public Folders**

**Title**

- Shortcut to B0112-T: Positions Vacant-filled Comp: This operations report is used by agencies to comp
- Shortcut to B0165-T: Job Attributes w/o OrgUnit This report displays detail about a job including jol

**Last Run Time**

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

**Save As Type:** Web Intelligence

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

**Keywords:** Job, Job Details, Job Attributes, training

**Assign Category:**

**Save** **Cancel**

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

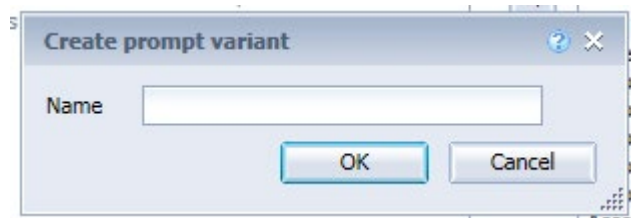
My Documents			
My Favorites		<b>Title</b>	<b>Type</b>
Agency Research Reports		Shortcut to B0112-T: Positions Vacant-filled Comparison as of Mar	Shortcut
Testing		Shortcut to B0165-T: Job Attributes w/o OrgUnit	Shortcut
Training Folder		Training B0165-T: Job Attributes w/o OrgUnit	Web Intelligence

**PROCESS TIP:** Each time you run this report, the data will refresh.

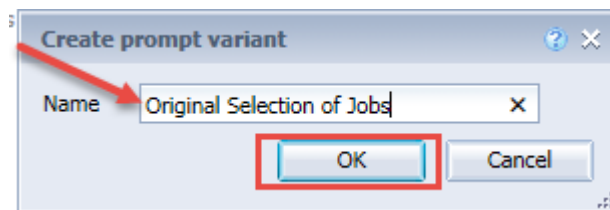
## Creating a Variant

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

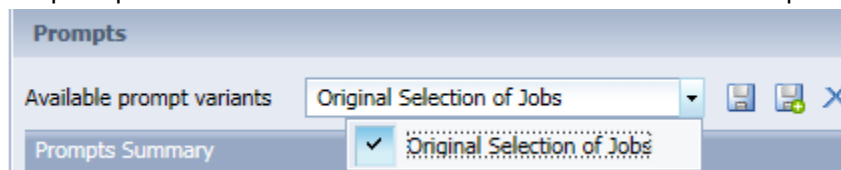
1. Click the Create Prompt Variant icon  which will open a Create prompt variant box.



2. Enter the desired name of the variant and click OK.



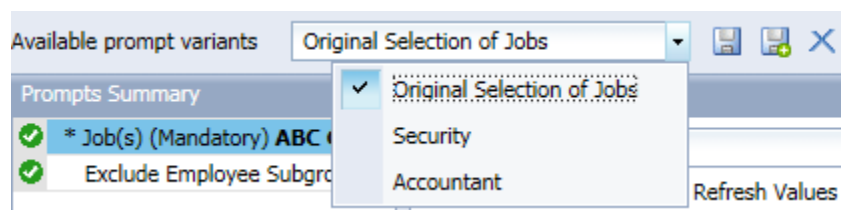
3. The prompt variant has been saved and is available to use in this specific report.



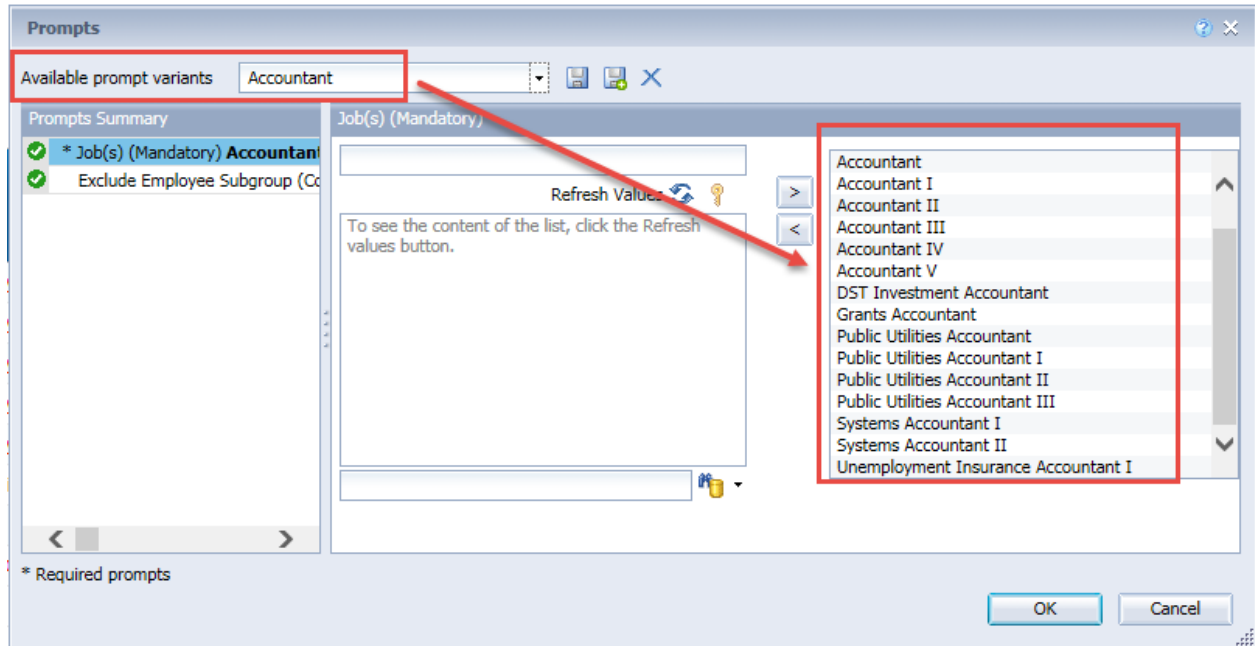
4. Click OK to generate the report.

**NOTE:** It is very important to save your report often while working in Design mode.

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



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



7. Click OK to generate the report.

## Training B0165-T: Job Attributes w/o C

JUL 2017

Job	Job Desc	Emp e Subg p
30000493	Unemployment Insurance Accountant I	FT N FLS/ Perr
30012947	Accountant	FT N FLS/ Perr
30012957	Grants Accountant	FT N FLS/ Perr

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

## ***SUMMARY***

In this lesson, you learned to:

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

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## Lesson 7: Course Review

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### Objectives

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

### Next Steps

Monitor the Integrated HR-Payroll System communication

- BEST Shared Services website (especially BOBJ System Status Log)

URL: <https://www.osc.nc.gov/state-employees/BEST>

- Access the Training HELP site

URL: [https://www.osc.nc.gov/state-agency-resources/training/training\\_help\\_documents](https://www.osc.nc.gov/state-agency-resources/training/training_help_documents)

Keep your training materials close by as a ready reference.

*Need transactional assistance?*

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed online through the web link in the steps above.

## Course Assessment/Evaluation

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

# CONGRATULATIONS!

**You've completed the course!**