Business Objects For Power Users
BI_BOBJ_300

Course Content

This course focuses on how to run, modify, and create a Business Objects report, including an overview of the reporting and editing options that are available. Topics include an overview of the Business Objects screens, modifying an existing report, adding objects, using filters, creating a new report.

- Introduction
- Unit 1 – Business Objects Infoview
- Unit 2 – Basic Report Design
- Unit 3 – Modifying Existing Reports
- Unit 4 – Edit Query
- Unit 5 – Creating New Queries
- Course Summary

Prerequisites and Access

- Prerequisites
  - UK_100, IRIS R/3 Access
- For access, you will need the following:
  - Sign the Statement of Responsibility (SOR);
    - Note: If you have previously signed the SOR, you do not need to sign it again.
  - BI_BOBJ_300 and BI_BOBJ_301 must be on your training plan;
  - Complete BI_BOBJ_300 and BI_BOBJ_301 successfully.
- Your access is determined by your Area Security Officer.

Unit 1

Business Objects Infoview

Unit 1 – Business Objects Infoview

- BOBJ Software
- Benefits of Business Objects
- BOBJ Terminology
- Access Review
- Report Folders
- Finding Reports

BOBJ Software

- You will need the Business Objects Infoview local client on your computer.
  - Your IT support can load the software, which is available on UK's Download page (https://download.uky.edu/).
  - You can call Customer Service tech support at 218-HELP, if you are unsure of who your IT person is.

Benefits of Business Objects (BOBJ)

- Business Objects (BOBJ) biggest benefit is the ability to join different data sources to create ad-hoc reports.
  - Example data sources: GRADS, Remedy, Faculty Database, Business Warehouse
- BOBJ supports conditional formatting, alerts, and drill-downs.
- BOBJ has a web interface where users can run reports in their role-based folders and save their own formatted views of the report to their My Favorites folder (which is hidden from other's view).
- As a power user, you will have access to an interactive-mode, where you can make changes to the query and the report.
- BOBJ also allows a wider flexibility of formatting of the report and the ability to export in Excel, Adobe pdf, or CSV (Comma Separated Value) formats.

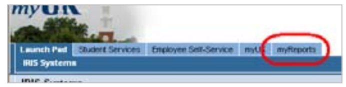
Terminology

Universe FI Funds Center Balances - Budget vs Actuals	• Contains objects mapped to data in the database • Is created from a specific data source
Classes FI Budget vs Actuals	• Logical groupings of objects that map to data in the database
Dimensions Funds Center	• Retrieves data from the database, typically character-type
Details Funds Center Key	• Provides descriptive data about the dimension
Measures Available Budget	• Retrieves numeric data resulting from calculations on data in the database
Query Filter Current Students	• Predefined filter that restricts the information retrieved from the database • Not all universes have predefined Query Filters

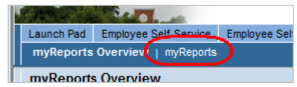
How to Access

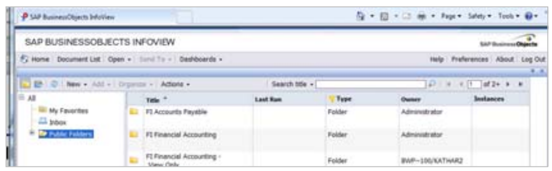
Use the following steps to access BOBJ reports:

- Click on myReports



- Click on myReports
  - Note: A new window will open automatically.





BusinessObjects Infoview

- For further instructions on selecting and opening a report in the web, please refer to the BI_BOBJ_200 course material or quick reference cards available on the ***myHelp*** website.

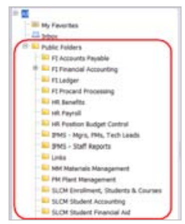
- Tip: You might want to clear the cache on your browser before running any Business Objects reports.

Folders

- The default folder is the My Favorites folder which contains any reports you have saved to it.

- Other users can not access reports in your My Favorites folder.

- Your Area Security Officer (ASO) will determine your access to folders under Public Folders.

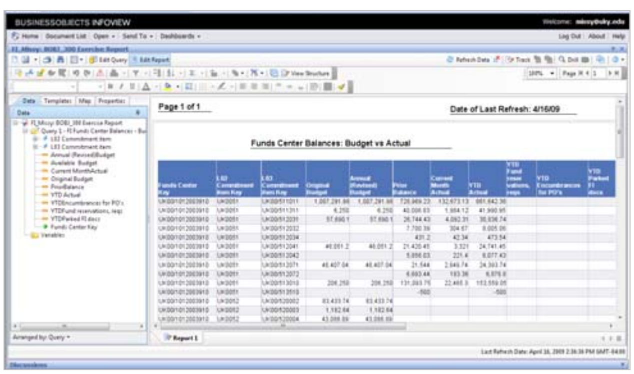


Unit 1 Assessment

Unit 1 Summary

- BOBJ’s benefits include the ability to join different data sources to create ad-hoc reports, power user access to an interactive-mode where changes can be made to the query and the report, a wider flexiblity of formatting of the report, and the ability to export in Excel, Adobe pdf, or CSV (Comma Separated Value) formats.
- Business Objects software is available on the UK Download page and must be installed to access the Power User editing mode.
- A Universe contains objects mapped to data in the database and is created from a specific data source.
- BOBJ reports can be accessed by going to the myReports tab on the myUK portal.

Unit 2



Basic Report Design

Unit 2 – Basic Report Design

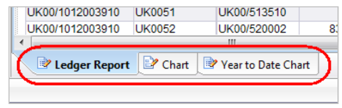
- Report Design
- Edit Report Screen
- Report Manager
- Grids
- Report Creating Tips

Reports

- Reports are created using Universes.
- Universes are created from a single data source, such as Oracle, Business Warehouse (BW-BEx), GRADS, Faculty Database, etc.
- Data from these sources will be as “fresh” as it is in the source.
  - For example, data from BEx (BW) is updated every 24 hours, while data from the Faculty Database is a mixture of real-time and 24 hours old depending on which data is used.
- You can create a new report or modify an existing report.

Report Design

- The report format can consist of:
  - One or more reports (sub-reports)
    - These sub-reports are similar to multiple worksheets in an Excel (workbook) file.



  - One or more blocks
    - A block can be a table, cross tab, or chart.

  - Returned Data

BEx (BW) Reports

- Reports based on BEx (BW) reports include the variables from the original BEx (BW) Query.
  - Example of report created from a Universe based on a BEx (BW) Query:

BOBJ Report: **FI_Missy: Departmental Budget Report**

Created from ↓

Universe: **Funds Center Balances: Budget vs Actual**

Created from ↓

BEx (BW) Query: **QZPU_C02_5008**

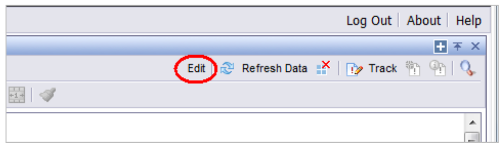
Created from ↓

BEx (BW) Infocube: **ZPU_C02**

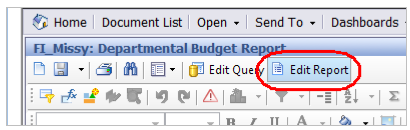
Edit Report Screen

Use the Edit Report screen to make changes to the report.

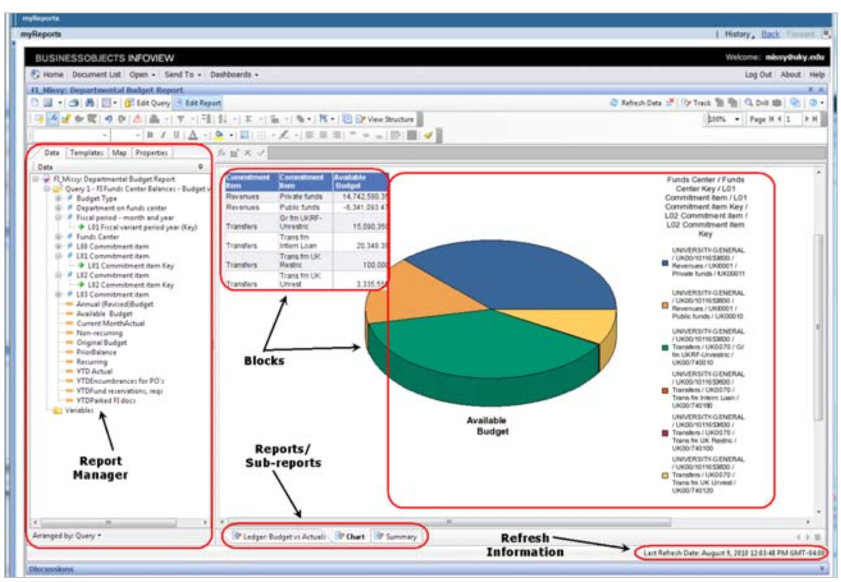
- After running the report, click on Edit



- **Note**: When the screen displays, the Edit Report button will be highlighted.

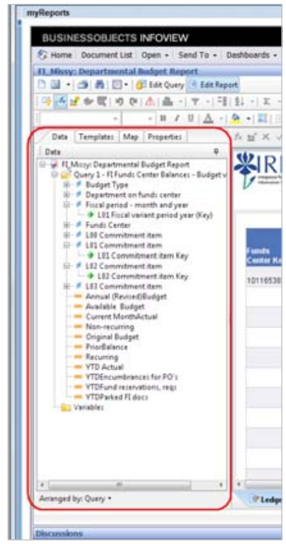


Edit Report Screen



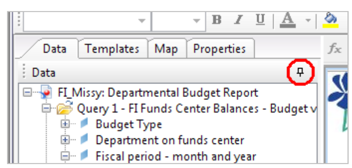
Report Manager

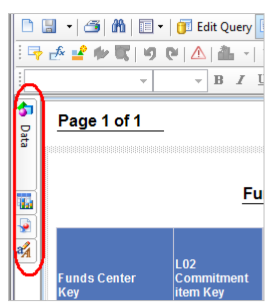
- The Report Manager is used to:
  - Manage all the objects and variables in the report;
  - Add or change the type of blocks in the report;
  - Navigate the report;
  - Format the properties of the report and its content.
- It contains four tabs – Data, Template, Map, and Properties.



Thumbtacks

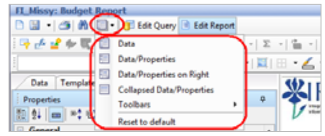
- The Thumbtack can be used to keep the Report Manager displayed or to hide it.
  - Click on the Thumbtack to collapse the Report Manager into clickable buttons.
  - Click on a button to open the Report Manager, displaying the tab you clicked, and then click the thumbtack to keep the Report Manager open.



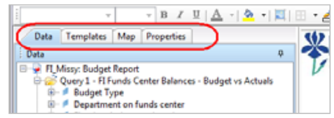


Configure Views

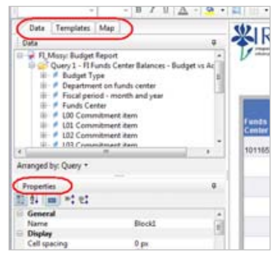
- It is simple to configure how the Report Manager tabs display by using Configure Views.



- Data is the default setting.
  - In this setting, the Data tab is in front of the other three tabs.

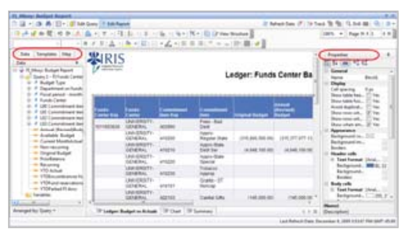


- In the Data/Properties setting, the Properties tab is below the other three tabs.
  - This setting allows any one of the three tabs in the upper section and the Properties tab to be seen simultaneously.

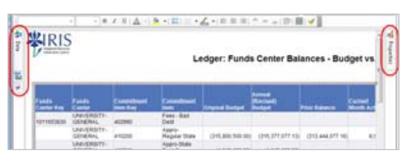


Configure Views

- In the Data/Properties On Right setting, the Properties tab moves to the right side of the report while the other three tabs stay on the left side of the report.

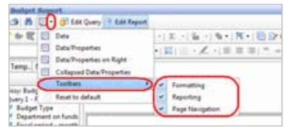


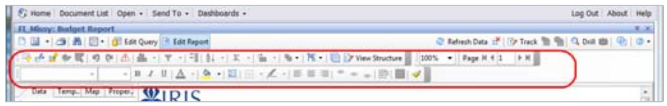
- In the Collapsed Data/Properties setting, all of the tabs collapse into clickable buttons.
  - This setting provides you with the most room to view the report.



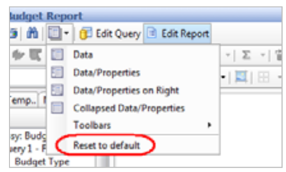
Configure Views

- You also can use Configure Views to toggle the Formatting, Reporting, and Page Navigation toolbars on and off.



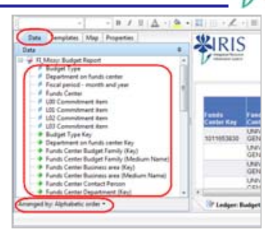


- Clicking on Reset to Default returns the Report Manager tabs and the toolbars to the default settings.

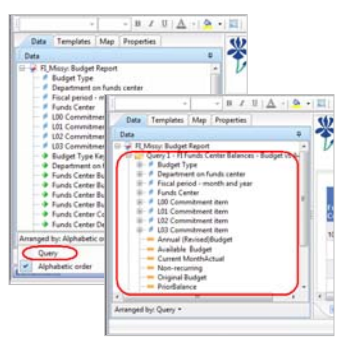


Data Tab

- The Data tab allows you to view the objects available for use in the report.
  - By default, it is organized alphabetically.

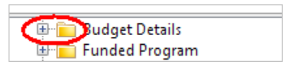


  - Use the drop-down selection at the bottom of the tab and select Query to arrange the list by query.
    - Note: Arranging by query shows the relationship of the details to the dimensions which can be important when choosing which object to use in the report.

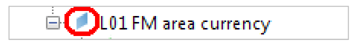


Data Tab

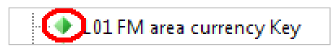
- Objects in the Data tab can include the following information:
  - Classes are logical groupings of objects that map to data in the database.



  - Dimensions retrieve data, typically character-type data.

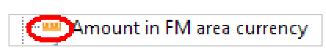


  - Details provide descriptive data about the dimension.

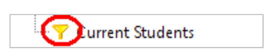


Data Tab

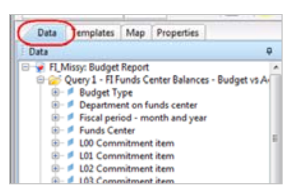
  - Measures retrieve numeric data resulting from calculations on data in the database.



  - Query Filters are predefined filters that restrict the information retrieved from the database.



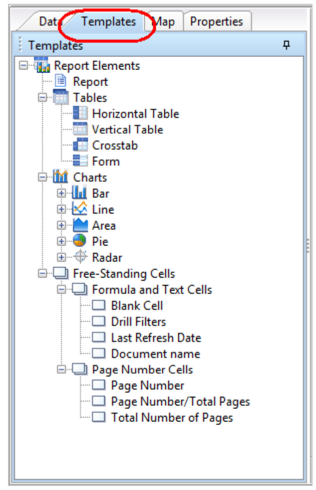
- Note: When adding or removing objects on the report, you must be on the Data tab in the Report Manager



Template Tab

- The Template tab allows you to add or change the type of blocks in a report by dragging and dropping templates.

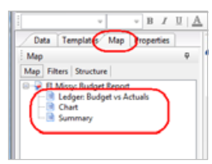
- It also provides templates for adding certain types of free-standing cells, such as:
  - Last Refresh Date
  - Page Number
  - Page Number/Total Pages

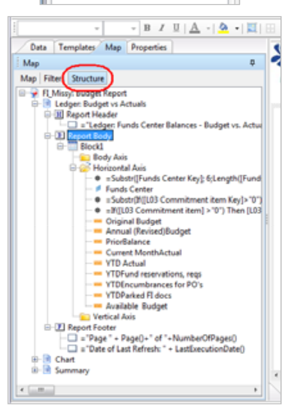


Map Tab

- The Map tab allows you to view and navigate through sub-reports and sections in the reports.

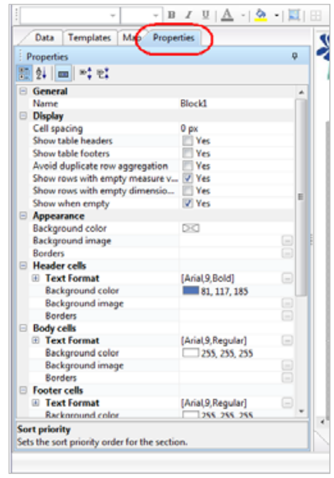
- Click on the Structure tab to view the structure of the report.
  - Note: Viewing the structure allows you to see the formulas that are used in the report.





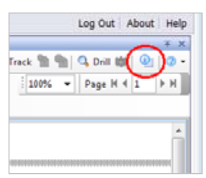
Properties Tab

- The **Properties** tab allows you to format the report and the blocks within the report.
- Click on a part of the report to view its properties, i.e., table, cell, title, header, etc.

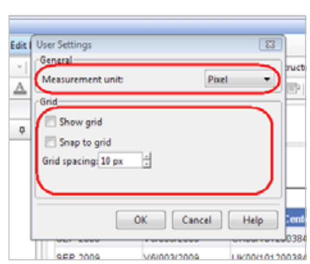


Grids

- You can use grids to line up report features, such as the title, graphs, charts, tables, etc.
  - Click **Show User Settings**

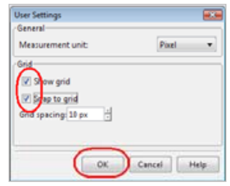


  - Options include:
    - Change **Measurement unit**
    - **Show grid**
    - **Snap to grid**
    - Change **Grid spacing**

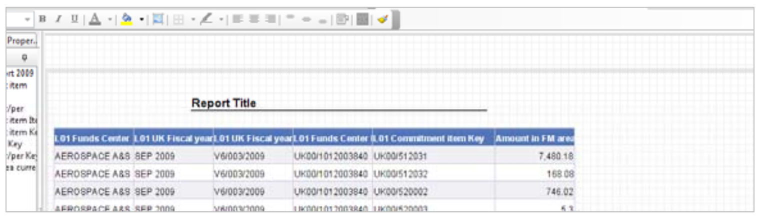


Grids

- Select your settings and click OK



- The grid displays in the background of the report.



Report Creating Tips

- Reports can be created “from scratch” or by modifying an existing report to meet your needs.

- To create a report, first determine what data you want to retrieve.

- For example, to create a financial report on certain funds centers within a specific college, you may want the following objects:
  - Fiscal Variant Period Year, Organizational Unit, Commitment Item, Fund, Funds Center, Original Budget, Annual (Revised) Budget, and Available Budget

Report Creating Tips

- Next, determine if there currently is a report that would work as a basis for your report.
  - If not, determine which Universe would contain your data.

- It is recommended to first build a simple version of the report, since you can always add objects to it.
  - A simple report will be more efficient to run.
  - It also will be easier to troubleshoot if there is a problem.

Unit 2 Assessment

Unit 2 Summary

- Universes are created from a single data source, such as Oracle, Business Warehouse (BW-BEx), GRADS, Faculty Database, etc.
- Data will be as "fresh" as it is in the data source itself.
- The Report Manager is used to manage all the objects and variables in the report, add or change the type of blocks in the report, navigate the report, format the properties of the report and its content.
- Reports can consist of one or more reports, one or more blocks, and returned data.

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Unit 2 Summary (cont.)

- Reports based on BEx (BW) reports include the variables from the original BEx (BW) query.
- Use the Edit Report screen to make changes to the report.
- The Data tab allows you to view the objects available for use in the report.
- Objects in the Data tab can include Classes, Dimensions, Details, Measures, and/or Query Filters.

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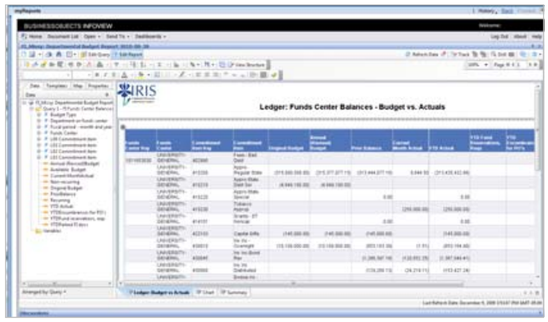
Unit 3



Modifying Existing Reports

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Unit 3 – Modifying Existing Reports

- Edit Report Mode
- Using Save As
- Rearranging Columns
- Removing Objects
- Adding Objects
- Titles and Headings
- Refresh Data
- Document and Table Properties

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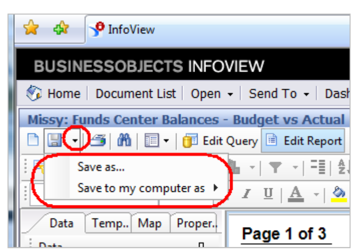
Edit Report Mode

- The Edit Report mode provides access to change the report including:
  - Format changes,
  - Sorting data,
  - Adding/deleting/rearranging columns,
  - Refresh data,
  - Using free standing cells,
  - Adding breaks, graphics,
  - Tracking data changes,
  - Access to Edit Query mode.
- Note: Not all functions above are taught in this course.

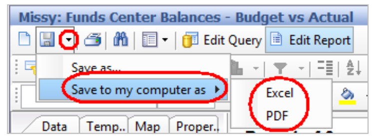
Using Save As

- It is important to use the Save As functionality if you are changing an existing report.
  - Using Save As ensures that you do not make changes to another person's report or unwanted changes to a version of the report that you want to keep.
- There are two ways to save.
  - Save As
  - Save to my computer As

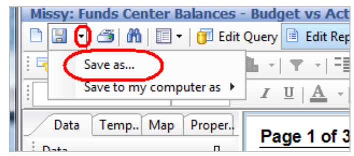


Using Save As

- To drop the report on your computer in Excel or pdf format, click on Save To My Computer As.
    - Note: You cannot upload the file back to Business Objects once it has been saved to your computer.



- To save the report in BOBJ, click on the drop-down icon to the right of the Save icon and select Save As.



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BOBJ Naming Standards

- The BOBJ naming standards should be followed to ensure consistency for the Business Objects reports.

- The Name should consist of the following format:
    - IRIS Module (Ex. FI, HR, SLCM, MM, etc.) or database (Remedy, ESI, CNS, etc.)
        - The name of the folder where the report originated as well as the naming standard found in other reports in the folder can be clues on how to name this report.
    - Underscore
    - User ID (your AD/MC/link blue ID)
    - Colon
    - Concise title for the report
    - Example:
        - FI_UserID22: Funds Center Balances – Budget vs Actual

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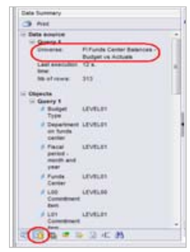
BOBJ Naming Standards

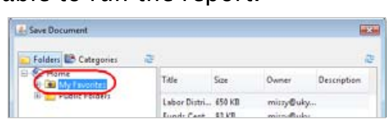
- The Description should consist of the following format:
  - A more in-depth description of the report,
  - This would be a good place to note the changes you made to the report,
    - Example: Filtered for my department (3J510) only
    - Example: Limited on Senior students or retiree employees, etc.
  - The Universe name within parentheses.
    - Example: (Funds Center Balances - Budget vs Actual)
    - Note: Since you are changing an existing report, the name of the Universe should appear in the description.
    - If the Universe name has not been entered, you can find the name by clicking on Data Summary when you are running the report or in the Data Manager in Edit Query mode.



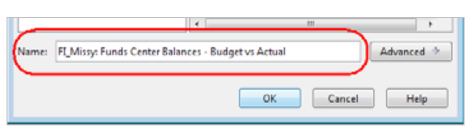
Using Save As

Use the following steps to save the report using your User ID:

- Click on My Favorites folder
  - Note: Alternatively, select one of the Public folders, if you want others to be able to run the report.

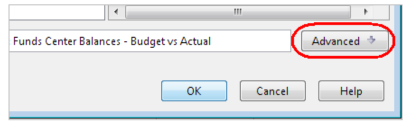


- Enter the new name for the report in the Name field
  - Important! Use the Business Objects Naming Standards when saving your report.

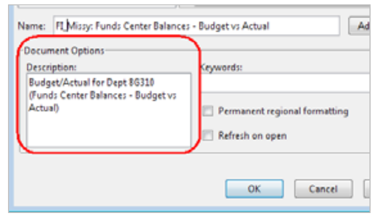


Using Save As

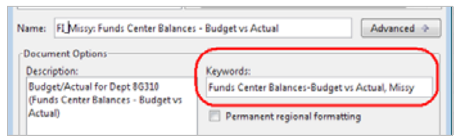
- Click on Advanced to change the description of the report



- Enter a short description of the report in the Description field
  - Remember to include the (Universe name) in the description!

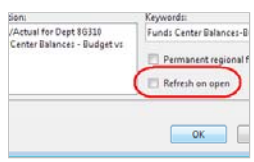


- Enter Keywords, if desired, which will aid in searches



Using Save As

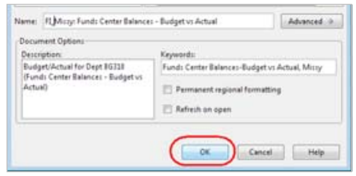
- Choosing Refresh on Open means that every time the report is opened, the system will go out to the data source and pull in the data, even if the data has not changed, which impacts the time it takes to open the report!



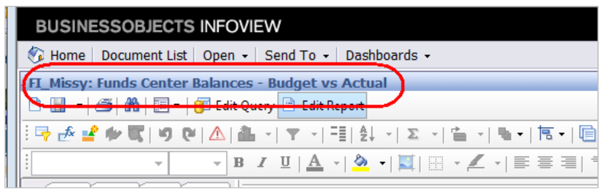
  - It is HIGHLY recommended to not select this option, if the report is based on a BEx universe, since you can refresh at any time!
  - If your report is based on a non-BEx universe, it is recommended to check the performance when using this option.
    - The “freshness” of the data in the data source may be a determining factor in using this option.

Using Save As

- Click OK



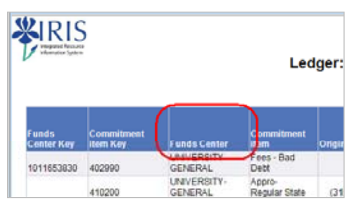
- After saving, the new name will display in the report window header.



Rearranging Columns

Use the following steps to rearrange columns in your report.

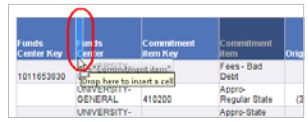
- Click on column heading and hold down the mouse button



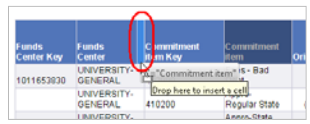
- Move the column to the new location and release the mouse button to drop the column
  - Note: As you move the column heading, the system will highlight possible “drop sites”.

Rearranging Columns

- When the cursor is on the left side of the column, the column you are moving will be dropped to the left of the column.



- When the cursor is on the right side of the column, the column you are moving will be dropped to the right of the column.



- When the cursor is in the middle of the column, the column you are moving will be swapped with the column.

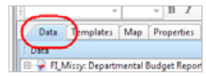
Rearranging Columns

- The moved column will display in its new location.

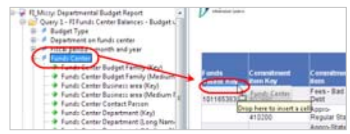
- Note: Make sure both the column heading and the data **move together!**
  - If a disconnect exists, one may move, but not the other.
  - Example: Only the column headings are swapped, the data in the columns did not swap.
  - Note: Data will also need to be swapped by dragging and dropping the data just as the column headings were swapped.

Adding a New Row

- You can add an object into a new row after an existing row, by dragging the object onto the bottom edge of a row header.
  - Click Data to select the InfoObject you want to add to the report



  - Drag and drop the InfoObject on the bottom edge of the row header

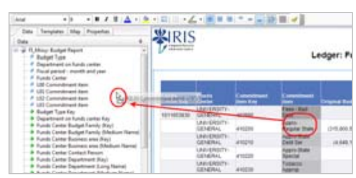


  - Note: The new row will display below the existing row.

Removing Objects

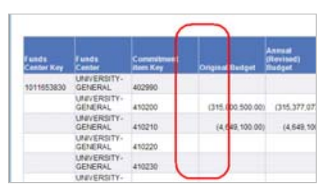
Use the following steps to remove an object (column/field) from the report.

  - Drag and drop object on to the Data tab on the Report Manager



  - Note: It does not matter where on the Data tab you drop it.

- The removed object will no longer display.

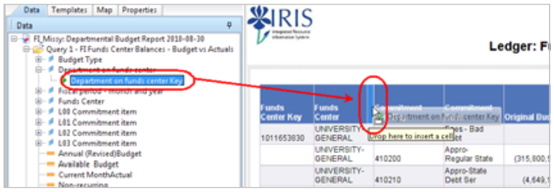


  - Note: As with rearranging, if there is a disconnect, you may need to remove both the data and the column heading separately.

Adding Objects

Use the following steps to add an object (column/field) from the Report Manager to the report.

- Drag and drop the object where you want it on the report.
- Be careful of placement!



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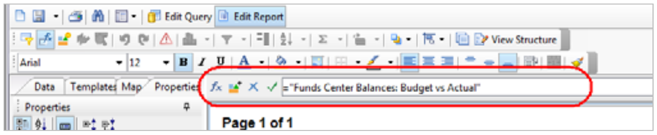
Titles and Headings

- In BOBJ, The title of the report and column headings consist of a formula.
  - Ex. Funds Center Balances: Budget vs Actual
    - ="Funds Center Balances: Budget vs Actual"
  - Ex. Funds Center Key
    - =NameOf([Funds Center Key])

- Titles and headings can be changed easily using the Formula Editor toolbar.



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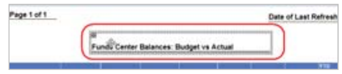
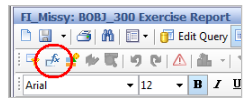
Title or Heading Changes

Use the following steps to change the title of the report or a column heading:

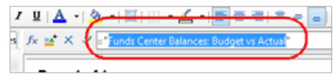
- Click on the title or heading



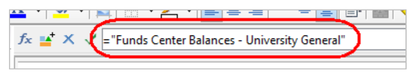
- Click Show/Hide Formula Editor



- Make the change



  - Note: Remember if you are just entering text it needs to be places between double quotes.



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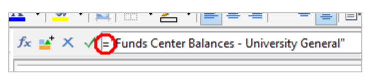
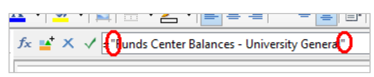
Title or Heading Change Tips

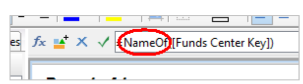
- The formula should start with an Equals sign (=).



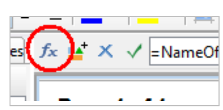
- Descriptive words should be placed between double quotes " ".



- It may contain formula functions, such as NameOf([ObjectName])



  - Note: You can click on Formula Editor to display more functions from which to choose.



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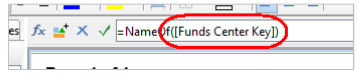
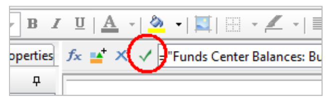
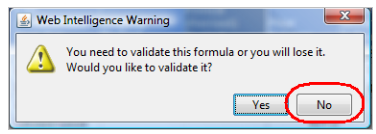
Title or Heading Change Tips

- It may contain data object strings.
  - The string will be contained within brackets and parentheses.



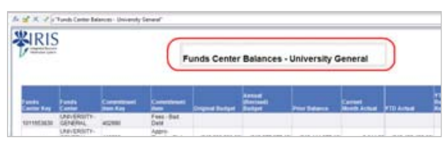
- After making the change, click on Validate (green checkmark).
  - If Enter is pressed instead of Validate, a system message may display, click No, and then click on Validate.



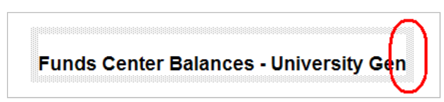


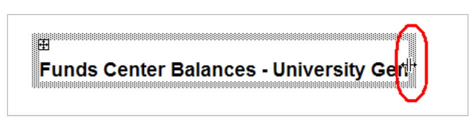
Title or Heading Changes

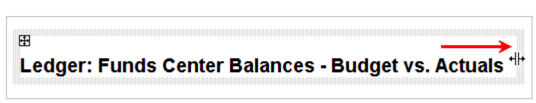
- The change will display.



- Formatting of the text box may need to be adjusted to make it fit the new title.
  - Click and drag the side of the text box to extend it or to shorten it



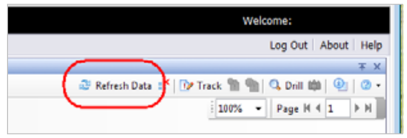


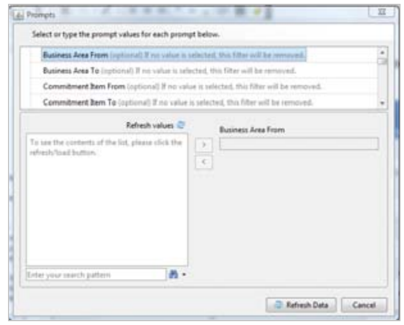


Refresh Data

Use the following step to refresh data in the report.

- Click Refresh Data

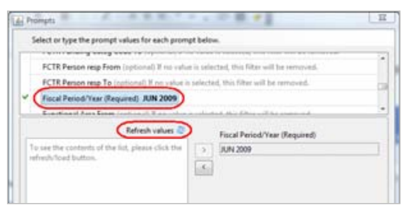




- Note: If you have set a filter to require a response by the user, a prompt for the filter will display, and the user will need to respond unless the filter has been set as optional.

Refresh Data

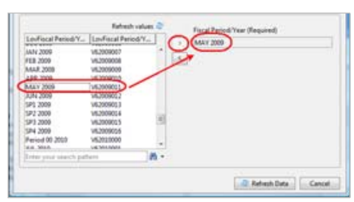
Use the following steps to choose new values



- Select a filter and click on Refresh Values
- Choose new values by either:
  - Clicking on value in the left window and clicking on Add

  OR

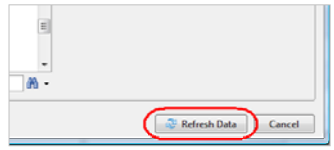
  - Double-clicking on value



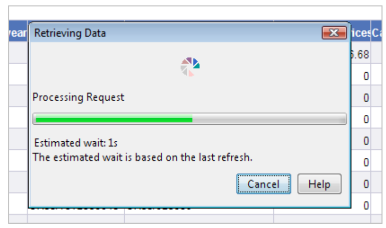
  - Note: Multiple values can be selected by using the Control (for individual values) or Shift (for a range of values) key or a combo of both.

Refresh Data

- Click **Refresh Data**



- The retrieving data system message will display.
  - **Note**: The length of time to run the query will depend on how much data is being requested and how busy the system is at the moment.



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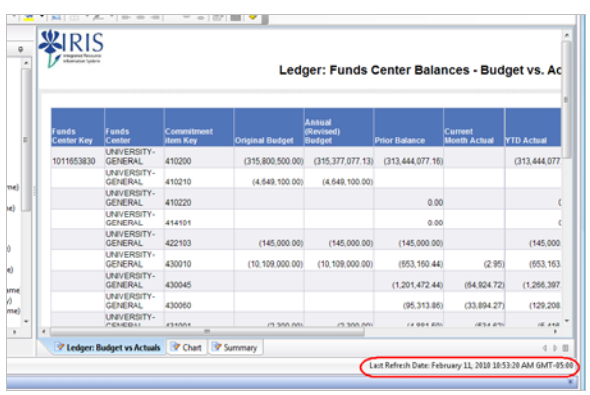
Refresh Data

- The new refresh date will display in the bottom right corner of the screen.
- Any data changes will display on your report.



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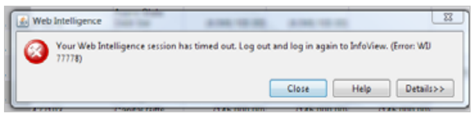
Refresh Data

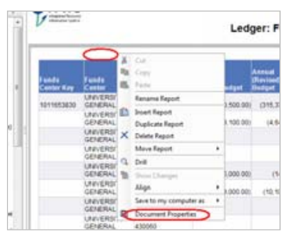
- Note: If no data is returned after clicking **Refresh Data**, you have probably been disconnected from the BOBJ server.
  - If you get disconnected, log out of the system and close your browser.
  - Next, log back into *myUK* and click on **myReport**

- Other time out messages include:

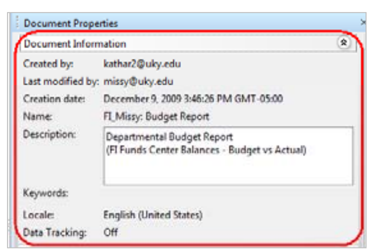


Document Properties

- To view the properties of the report, right-click on the report and select **Document Properties**.
  - Note: Your cursor must be on the report, not on the data in the table.

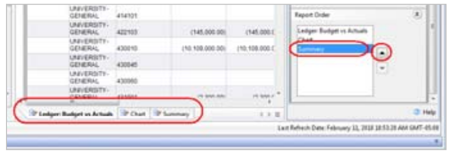


- The **Document Information** section displays
  - Created by and Last Modified by
  - Creation Date
  - Name (of the report)
  - Description
  - Keywords
  - Data Tracking Status



Document Properties

- In the Report Order section, you can set the order of the sub-report tabs by using the following steps.
  - Select the report
  - Click Move Up or Move Down
  - Note: You will need to repeat these steps to move a report more than one position.



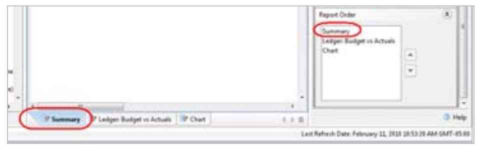
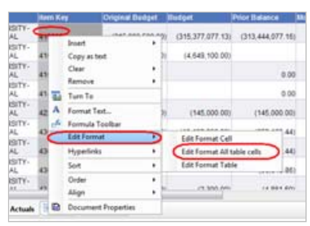


Table Properties

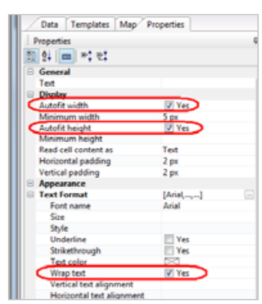
Use the following steps to set the properties for the entire table.

- Right-click on the table and select Edit Format



- Select Edit Format All table cells

- Recommended settings include:
  - Autofit Width
  - Autofit Height
  - Wrap Text



Unit 3 Assessment

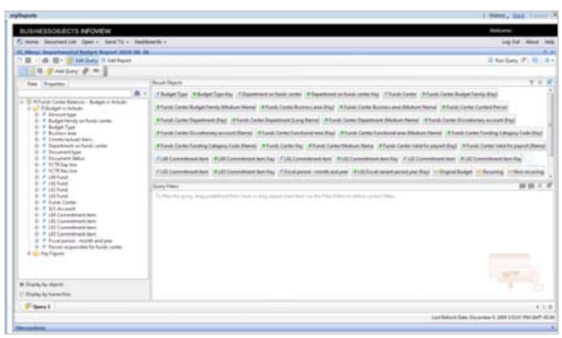
Unit 3 Summary

- BOBJ naming standards should be followed to ensure consistency for the Business Objects reports.
- When adding an object to create a new column in the report, it can be added to the left or right of column B.
- In BOBJ, the title of the report and column headings consist of a formula.

Unit 3 Summary (cont.)

- When rearranging columns, move the object to the left side of the column to drop the object to the left side of the column.
- When rearranging columns, move the object to the right side of the column to drop the object to the right side of the column.
- When rearranging columns, move the object to the middle of the column to swap the columns.

Unit 4



Edit Query

Unit 4 – Edit Query

- Edit Query Screen
- Adding Objects
- Query Filters
- Complex Filters

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Edit Query Screen

- You will need to move to the Edit Query screen to make any of the following changes to your report.
  - Add objects that are in the Universe but not currently available to the report
  - Add or change filters to the report
    - Note: You will not be able to change any filters (variables) inherited from the original BEx (BW) query, if that is the basis of the report.
- The Edit Query screen allows you to build the query behind the report.
  - However, you must run the query before you can save the report.

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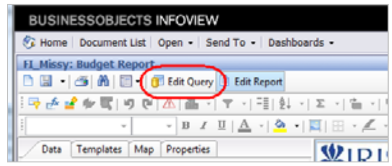
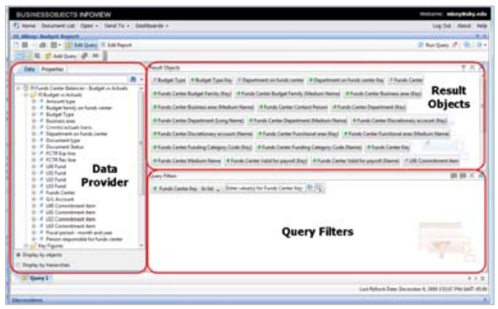
Edit Query Screen

- To add objects or filters to the report, click Edit Query.
  - Note: This process might take a few seconds depending on report size.





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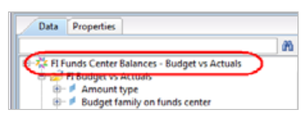
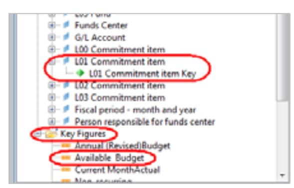
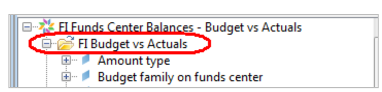
Data Provider

- The Data Provider frame displays the Universe name.



- It contains three different types of objects logically grouped into Classes (the folders), which map to data in the database.
  - Dimensions
  - Details
  - Measures





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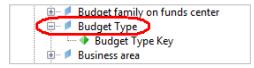
Data Provider

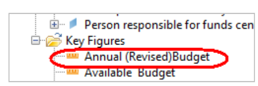
- Dimensions retrieve data, typically character type.
    - Examples: Company Code, Student Number, Person ID, etc.
        - Note: If a class contains L0+ dimensions, it is due to hierarchies in BEx (BW).
        - Note: Most data will be found under the L01, L02, etc. dimensions, not the L00.



- Details provide descriptive data about the dimension.
    - Example: The Funds Center dimension has the details Funds Center Contact Person, Funds Center Key, Funds Center Medium Name, etc.

Data Provider

- Measures retrieve numeric data resulting from calculations on data in the database.
    - Examples: Amount in FM Area Currency, Capital Expenditures, Current Expenditures, Number of Records, Annual (Revised) Budget, etc.

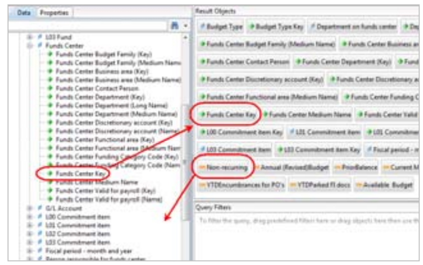


- Query Filters are predefined filters that restrict information retrieved from the database.
    - The filter may prompt the user to select a value before proceeding.
    - Example: Current Students

Result Objects

- The **Result Objects** frame displays the objects chosen for the query.

- Objects can be added or removed from the **Data Provider** frame by dragging and dropping.



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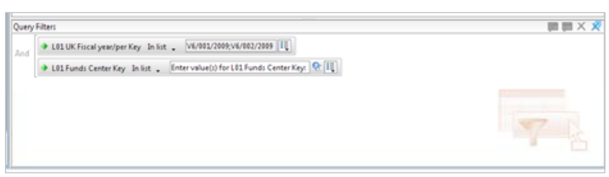
Query Filters

- The **Query Filters** frame displays the filters used in the query.



- Filters can be simple or complex and are useful for limiting the amount of data retrieved.
- **Note**: For reports built from BEx (BW) Universes, these can be useful when you need to filter beyond the “built-in” variables provided.
  - To view the “built-in” BEx variables, click on **Refresh Data**.
  - The filters will be displayed at the top of the **Prompt** window.

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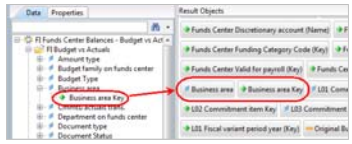
Adding Objects

- When modifying an existing report, adding an object to the report from the Universe is a two step process.
  - In Step One, you would add an object by either dragging/dropping or double-clicking on the object.



  - Note: If a Detail is chosen, the related Dimension also will be added.
  - Note: Order does not matter when modifying an existing report, since you are only making the object available to use in the report, NOT adding it to the report yet.

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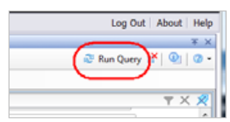
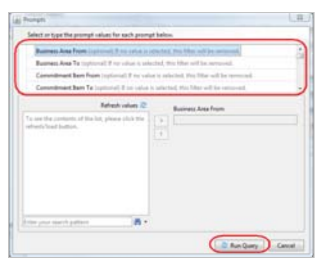
Adding Objects

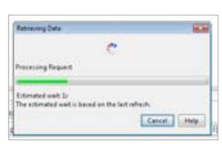
- When finished, click Run Query



- If the prompt window displays, choose new value(s), if desired, and click Run Query



- Note: A system message displays while the data is being retrieved.



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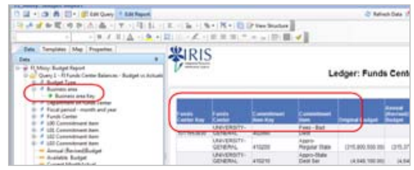
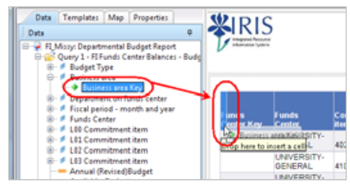
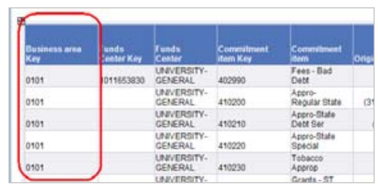
Adding Objects

- **Note**: The new objects are listed in the **Data** list, but not yet in the report.





- In **Step Two**, you add the object(s) to the report to display data by dragging and dropping it where you want it to go.



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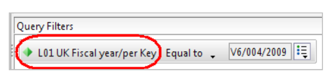
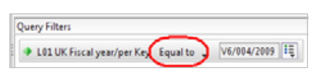
Query Filters

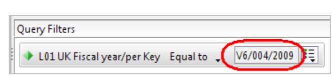
- Query filters consist of three elements.
  - The object is used to filter data.
    - Example: **UK Fiscal Year/Period Key**



  - The operator is used to show the relationship between the object and operand.
    - Examples: **Equal to**, **Matches pattern**



  - The operand (values) is used for filtering.
    - Example: **V6/004/2009**



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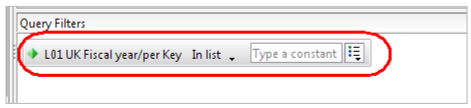
Query Filters

Use the following steps to add a query filter:

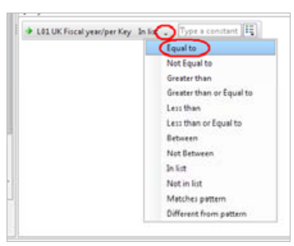
- If you are on the Edit Report screen, click Edit Query;
- Place the object in the Query Filters frame.



- **Note**: You can drag the object from either the Report Manager or the Results Objects frame.
  - If you drag the object from the Reports Objects frame, you will NOT be removing from the Reports Objects frame.

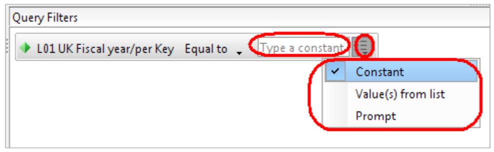
Query Filters

- Use the Operator Drop-down icon to select the operator.



- **Note**: Selecting Matches pattern or Different from pattern allows the user to enter a partial value, similar to searching using a wildcard, when using a prompt filter.

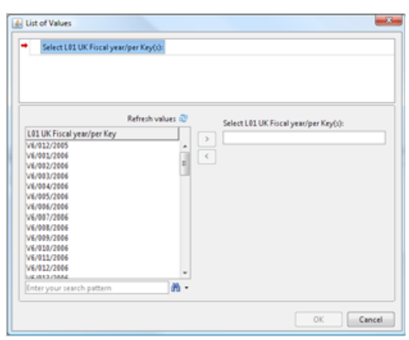
Query Filters



- Enter the operand (value) by typing it into the Operand field or using the Drop-down List icon and selecting one of the following:
  - Constant – enter a value (not recommended)
  - Value(s) from list – choose the value(s) from a list
  - Prompt – the user of the report will enter the value

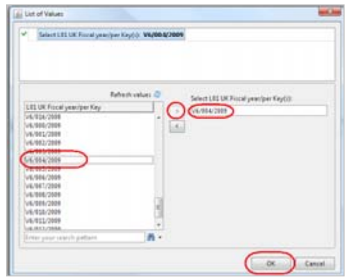
Values List

- If selecting from a value list, the List of Values window will open, displaying the values for the object.



Values List

- Select the value by either double-clicking on it or highlighting it, then clicking on the **Add** icon.



- Click **OK** to close the window.

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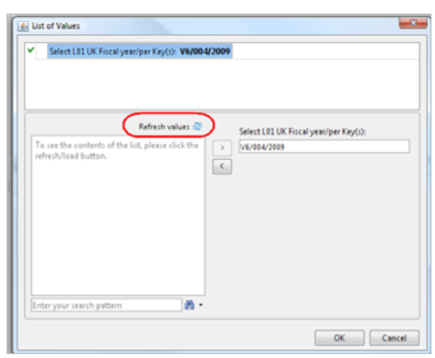
Values List

- When making a different selection from the value list, refresh the value list by clicking on **Refresh Values**.



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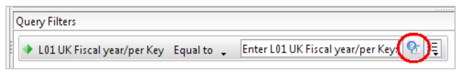
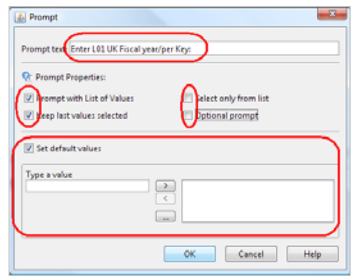
Using Prompts

- If prompting the user to enter the value, you can change the prompt settings by clicking on the Prompt Properties icon.



- Prompt property settings include:
  - Prompt text
  - Prompt with list of values
  - Keep last values selected
  - Select only from list
  - Optional prompt
  - Set default values



Using Prompts

Option	Definition
Prompt Text	• Will default to "Enter value(s) for (object name):"; User can change default
Prompt with List of Values	• Displays all values for the object; Allows user to select desired values
Keep last values selected	• Defaults to last value(s) selected by user on the previous refresh; User can change the value or refresh using the last selection
Select only from list	• Prevents users from typing values that do not exist in the database
Optional prompt	• Allows users to refresh the document without the need to enter a response to the prompt or by entering a partial response to the prompt • Note: If no response is entered, the filter is not applied
Set default values	• Defines the default value(s) that appear in the prompt; can be defined by entering value(s) into the **Type a value** field or choosing the value(s) from a list

Using Prompts

- Tips
  - When the prompt is for a date, do not select Prompt with List Values if you want the user to see the popup calendar.
  - Be careful when using Optional prompt display, because a dialogue box will open to inform users, and if a value is not entered, the filter will not be applied.
  - The Prompt with List of Values does have a limit, so all values may not show.

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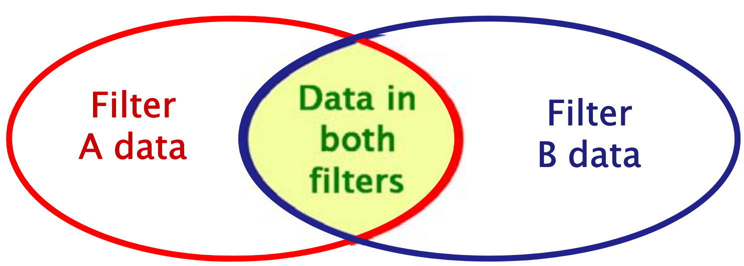
Complex Filters

- When you place two or more objects into the Filter frame you create a complex filter.
- There are two types of complex filters.
  - AND operator – returns values that are true for both (all) filters
  - OR operator – returns values if either filter is true



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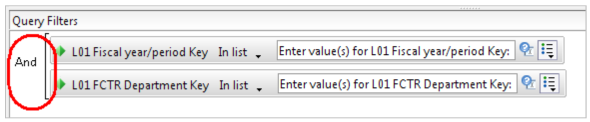
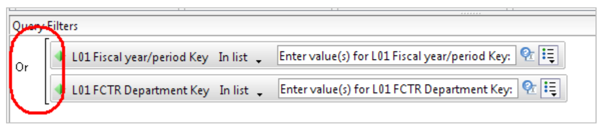
Complex Filters

- With two or more filters in the query, an AND operator is created automatically.

- You can switch between the AND and OR operators by double-clicking on the operator.

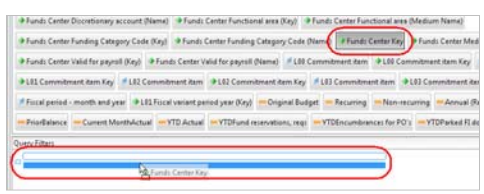




Complex Filters

- With more than two filters, priorities must be set, and this is accomplished by positioning and grouping the filters.

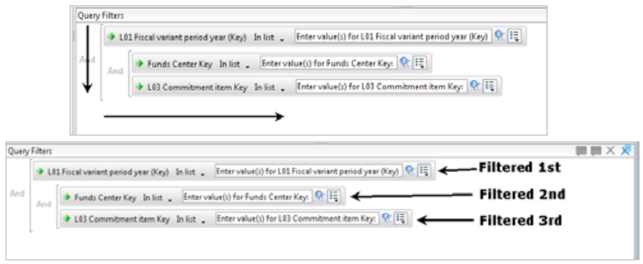
- To group filters together, drag and drop one filter on top of the other filter.
  - The dark, highlighted rectangle is where the filter will be placed.



  - Double-click on the operator to switch between AND and OR.

Complex Filters

- Brackets will denote the filter groupings.
  - The data will be filtered by the system using the filters from top down and left to right.



  - Tip: Set your filters to filter out the largest group of data first, and then the next largest group, etc.

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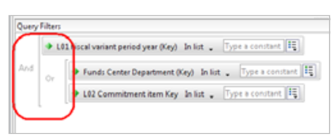
Complex Filters

- Examples of complex filters:
  - All conditions must be met

  - First condition (filter) must be met, and then one of the remaining filters must be met



- Tip: You may want to add filter information to the description of the report.

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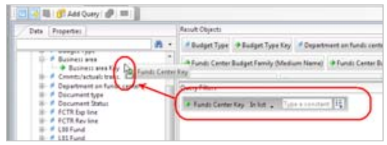
Removing Filters

- You can remove a filter from the Query Filter frame by dragging the filter and dropping it into the Report Manager.



- Note: If you are using a BEx (BW) Universe, you **will not** be able to remove any filters that were inherited from the original BEx (BW) query.
  - You will only be able to remove any filters located in the Query Filter frame.

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Unit 4 Assessment

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Unit 4 Summary

- The Edit Query screen allows you to build the query behind the report, to add objects from the universe that are not currently available to the report, and to add/change filters on the report.
- Dimensions retrieve data, typically character type.
- Details provide descriptive data about the dimension.
- Measures retrieve numeric data resulting from calculations on data in the database.

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Unit 4 Summary (cont.)

- Query Filters are predefined filters that restrict information retrieved from the database.
- The AND operator returns values that are true for both (all) filters.
- The OR operator returns values if either filter is true.
- When you place two or more objects into the Filter frame you create a complex filter.

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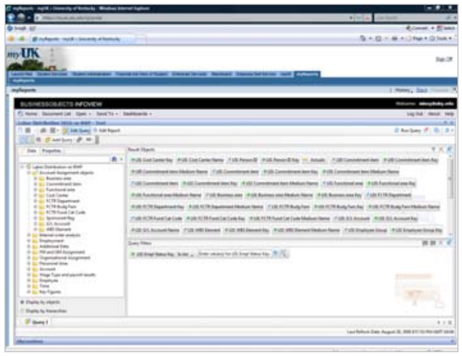
Unit 5



Creating New Queries

Unit 5 – Creating New Queries

- Creating Queries
- Document Properties
- Report Property Options

Creating New Queries

- To create a new query, first determine what data you want to retrieve.
  - For a finance report you might choose the following data: Funds Center, Commitment Item, Business Area, Available Budget, Recurring, Non-recurring.
  - For a student enrollment report you might choose the following data: Main Program, Reg. Classification, Major, Record count of students.

Creating New Queries

- Next you need to determine which Universe contains the needed data, such as:
  - FI Fund Center Balances: Budget vs Actual
  - SLCM Student Status – Current Enrollment
  - HR Master Data
  - PM Order Universe
- The easiest way to determine what data is in a particular Universe is to view existing reports based on the Universe.

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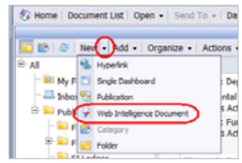
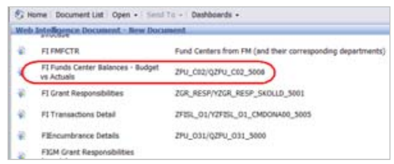
Creating Queries

Use the following steps to create a new query from the Document List screen:

- Click on the New drop-down icon and select Web Intelligence Document



- Double-click on the universe you want to use
  - Note: You will only see universes for which you have access.



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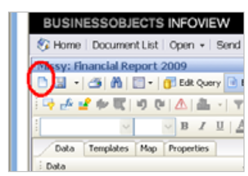
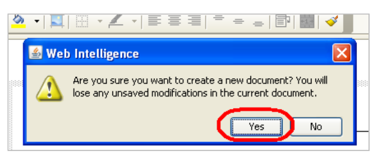
Creating Queries

Use the following steps to create a new query from the Document List screen:

- Click on the New icon



- When the system message appears, click Yes
  - Note: If you have not saved any changes on the current document, click No, save the changes first.



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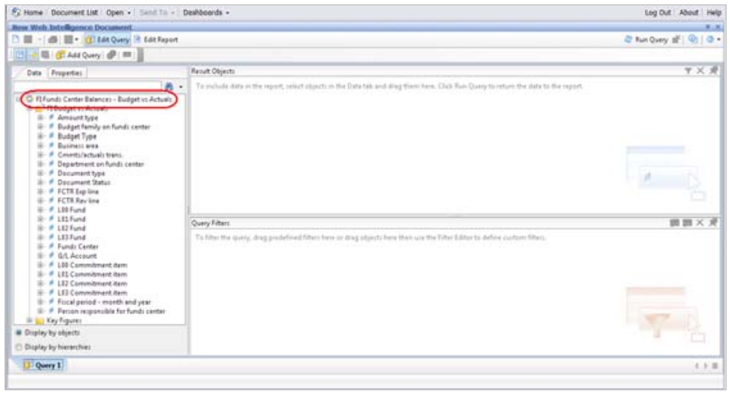
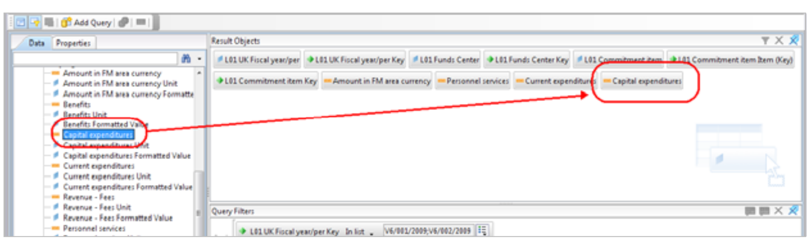
Creating Queries

- The new query will open using the same universe as the previous query.



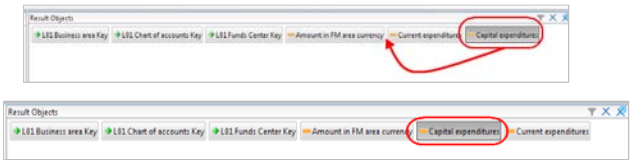
Adding Objects

- You can add objects to the **Results Objects** frame by using one of the following methods:
  - Drag and drop the object;
  - Double-clicking on the object.



Adding Objects

- Once objects are in the Result Objects frame, you can rearrange them by dragging and dropping.



- Typically, Dimensions/Details are listed first, then Measures are last.
  - This placement will display the Dimensions and Details on the left side of the table (the rows), and the Measures on the right side of the table (the columns).

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Query Tips

- You may want to divide the objects wanted for the report into two groups – primary and secondary objects.
  - Primary objects are objects needed initially in the report.
  - Secondary objects are objects available to use in the report, but not initially displayed in the report.
  - First, you create the query with primary objects, run the query, and save the report.
  - Next, you can modify the query by adding the secondary objects and making them available for use in the report.

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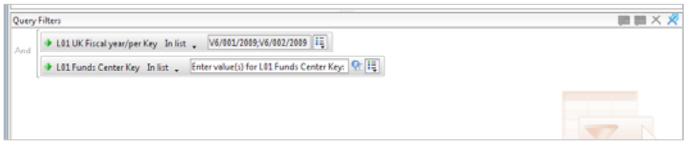
Query Filters

- If desired or needed, you can add query filters.



- It is recommended to add filters, especially for large dimensions such as Person ID or Funds Center, to reduce the size of the results.
  - Note: Filters may not be needed when using Universes based on BEx (BW) queries, since they inherit the filters from the original BEx (BW) query.

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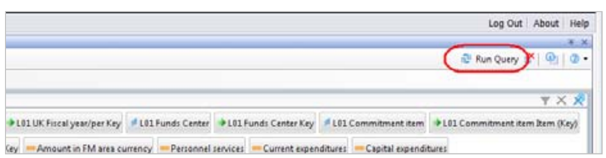
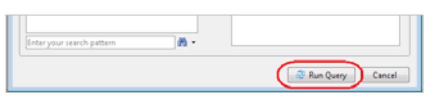
Run Query

- When you are finished building your query, click on Run Query to run the report.



- If the prompt window displays, choose any required value(s) and/or any optional filter values, and click Run Query.



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Unit 5 Assessment

Unit 5 Summary

- When creating a new query, determine the data and universe you want to use, and then decide which objects are primary objects and which are secondary objects.
- If the query does not have inherited filters, add at least one filter to reduce the amount of data that is retrieved.
- Typically, Dimensions/Details are listed first, and then Measures are listed last.
- Filters may not be needed when using Universes based on BEx (BW) queries, since they inherit the filters from the original BW query.

Power User Help Websites

- *myHelp* website:
  - http://myHelp.uky.edu/rwd/HTML/BW.html
  - Contains Quick Reference Cards (QRCs), Course manuals, Frequently Asked Questions, and other job aids
- IRIS website
  - http://www.uky.edu/IRIS/BW/
  - Contains Documentation, Assistance & Support, and other references
- For questions or assistance contact:
  - BI-Requests@email.uky.edu

Course Summary

- Understand Business Objects Infoview functionality
- Display a report
- Understand Edit Report screen
- Modify an existing report
- Understand Edit Query screen
- Add new objects to query
- Create query filters
- Create a new report

BOBJ Access

- If you are taking BI_BOBJ_300 to get Business Objects Power User access, you will need to take BI_BOBJ_301 BOBJ Lab for Power Users.
  - Note: In order to take BI_BOBJ_301 and get access, it MUST be on your training plan and all pre-requisites must be completed successfully!

- Use the following steps to begin BI_BOBJ_301.
  - Click on the BI_BOBJ_301 Practice Guide button below and print the guide.
  - Follow the steps in the Practice Guide to obtain training access, practice the exercises, and take the BI_BOBJ_301 assessment.

Course Completion Instructions

- You can provide IRIS Training with feedback on this course by completing the BI_BOBJ_300 Business Objects for Power Users course evaluation.

- Click on the button below to open the evaluation in a new window.