Business Objects
For Power Users
BI_BOBJ_301
Practice Guide

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BI_BOBJ_301 Practice Guide Overview

This Practice Guide is intended to accompany the BI_BOBJ_300 Business Objects for Power Users WBT. It provides all the procedures necessary to practice the transactions shown in the BI_BOBJ_300 online course using the BOBJ Training reports.

These lab exercises focus 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
- Modifying an existing query
- Using filters
- Creating a new report

If you like to check each step as you complete it, a check box is included next to the step number for your convenience.

FIRST AND MOST IMPORTANT!

You will need to request BOBJ Training access and receive the access;

AND

You will need to install the Business Objects local client on your computer;

BEFORE

You can complete the exercises in this guide!

Please follow the information provided in the **Getting Ready to Practice BOBJ** section to request your access and install the BOBJ client.

Getting Ready to Practice BOBJ

1. Go to the **BI_BOBJ_300 Business Objects for Power Users** webpage (http://myhelp.uky.edu/rwd/HTML/BW/BI_BOBJ_301.html) and submit the **BI_BOBJ_301 Training Access Request** email.

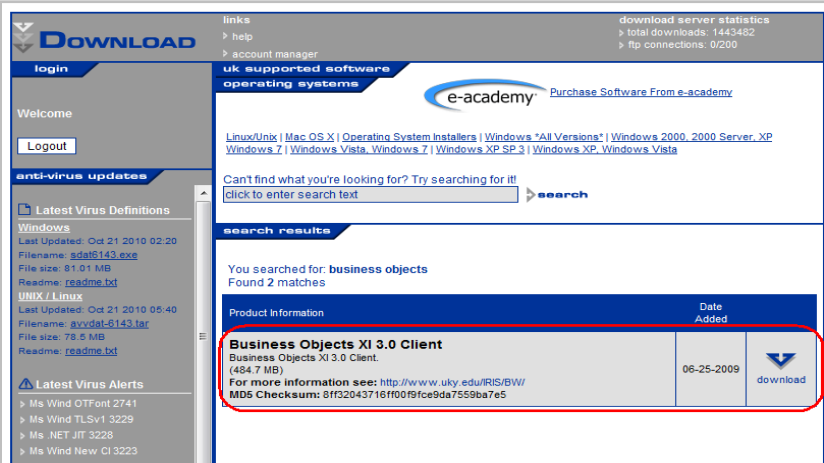   a. You should receive access within one business day of receiving e-mail confirmation from IRIS Training.

2. Contact your IT support person or go to the UK Download page (https://download.uky.edu/) and get the **Business Objects XI 3.0 Client**

   a. **Tip:** In the search field, type "Business Objects"

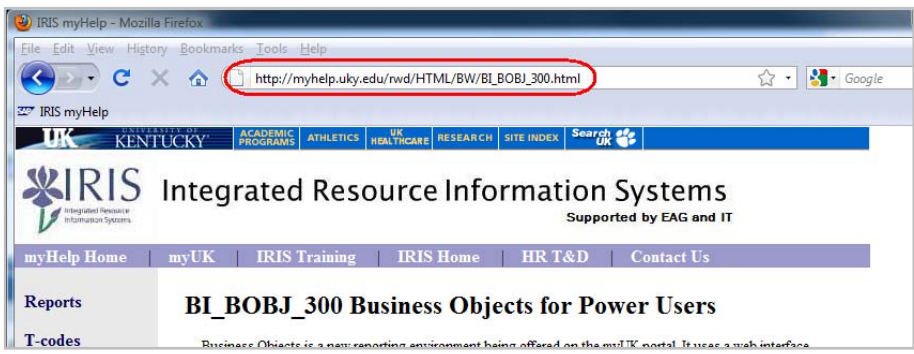**Tip**: Request the training access first! While you are waiting for the access, you can install the BOBJ software.
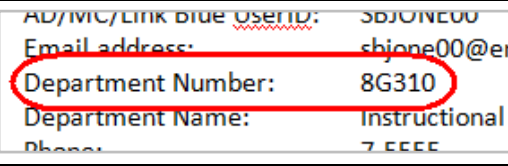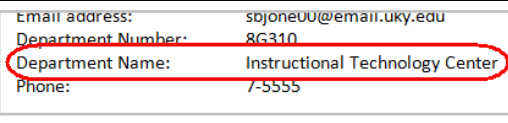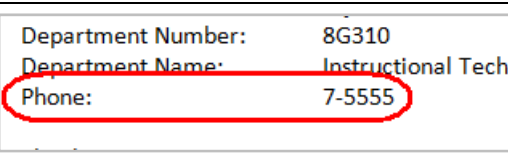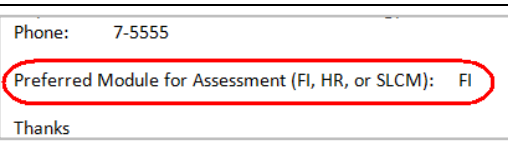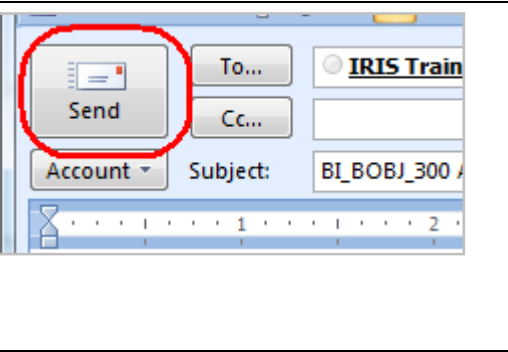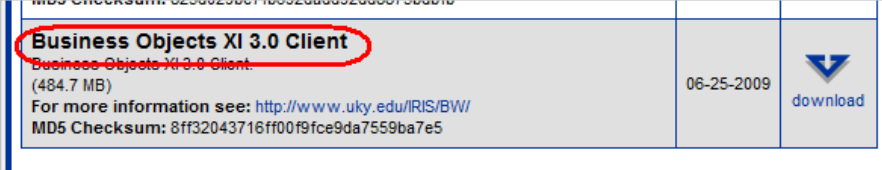
NOTE:
The report universe you will be using and creating in the exercises is based on a BW query. Your reports will inherit the variables used in the original BW query in addition to any filters you may add.

Exercise 1 – Request Training Access

Scenario

You will be requesting access to Business Objects and the training folders. Please don't forget that you will need to get the BOBJ local client software loaded onto your computer!
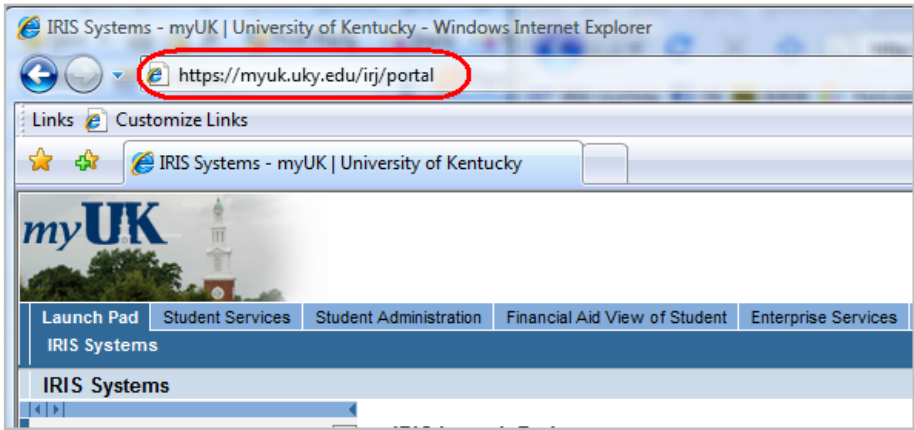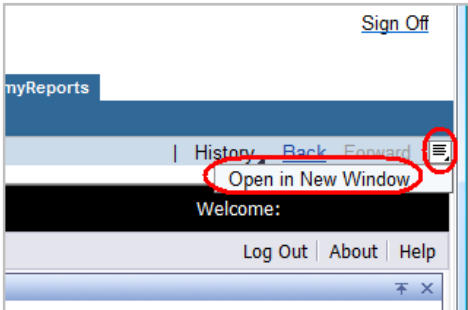
1. ☐	Go to the **BI_BOBJ_300** webpage at **http://myhelp.uky.edu/rwd/HTML/BW/BI_BOBJ_300.html**	
2. ☐	Click on **BI_BOBJ_300 Training Access Set-up** link	
3. ☐	When the email screen displays, enter your **Full Name**	Full Name: Sidney B. Jones
4. ☐	Enter your **Person ID**	Person ID: 11009999
5. ☐	Enter your **AD/MC/Link Blue User ID**	AD/MC/Link Blue UserID: SBJONE00
6. ☐	Enter your **Email Address**	Email address: sbjone00@email.uky.edu

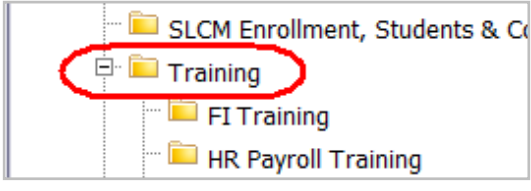|			
7. ☐	Enter your **Department Number**	AD/MC/Link Blue UserID: SBJONE00 Email address: sbjone00@em Department Number: 8G310 Department Name: Instructional T Phone: 7-5555	
8. ☐	Enter your **Department Name**	Email address: sbjone00@email.uky.edu Department Number: 8G310 Department Name: Instructional Technology Center Phone: 7-5555	
9. ☐	Enter your **Phone** number	Department Number: 8G310 Department Name: Instructional Techn Phone: 7-5555	
10. ☐	Enter the module you would prefer to use for the assessment, either FI, HR, or SLCM	Phone: 7-5555 Preferred Module for Assessment (FI, HR, or SLCM): FI Thanks	
11. ☐	Click **Send** **REMINDER:** It will take up to one business day to receive your access.	Send To... IRIS Train Cc... Account ▾ Subject: BI_BOBJ_300 A 1 ... 2	
12. ☐	Contact your IT person to install the **Business Objects XI 3.0 Client** **Note:** if you have the install rights, it is available at: https://download.uky.edu/ MD5 Checksum: 025d025bc71b052dddd52d0073bdb1b **Business Objects XI 3.0 Client** Business Objects XI 3.0 Client (484.7 MB) For more information see: http://www.uky.edu/IRIS/BW/ MD5 Checksum: 8ff32043716ff00f9fce9da7559ba7e5 06-25-2009 ⬇ download	
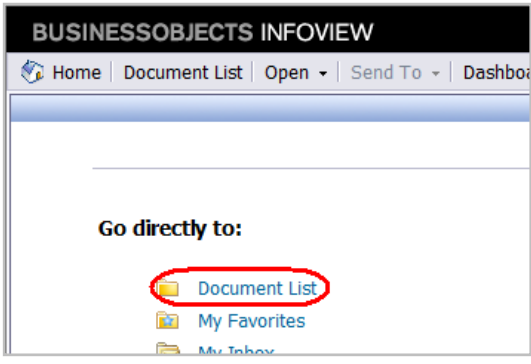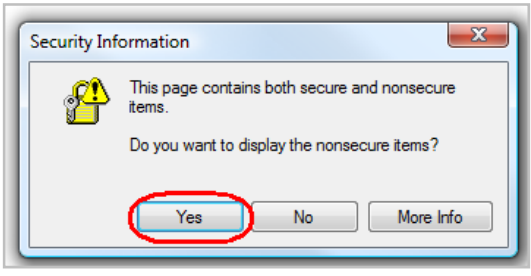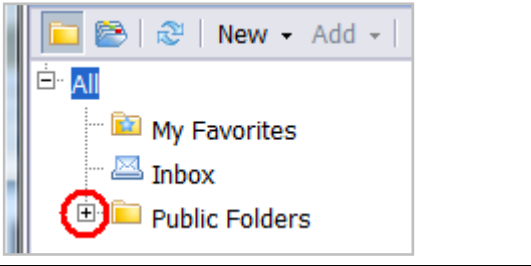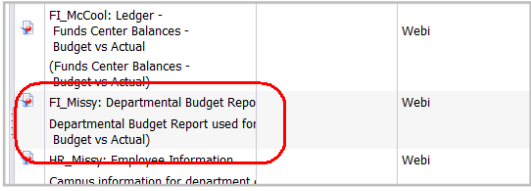
Exercise 2 – Display a BOBJ Report

Scenario
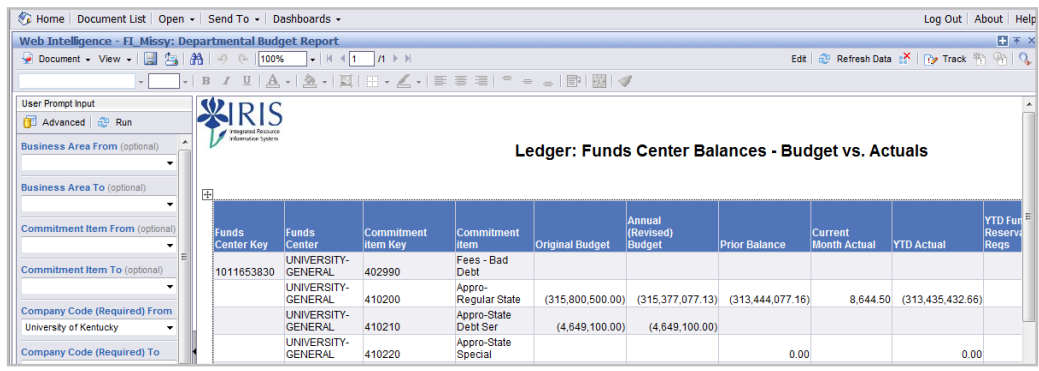
You will be displaying a BOBJ report.

	Opening Business Objects	
1. ☐	Select the window where you are logged into *myUK*	
2. ☐	Click **myReports**	
3. ☐	Click **Options** and select **Open in New Window**	

4. ☐	In the new BusinessObjects Infoview window, click **Document List**	**BUSINESSOBJECTS INFOVIEW** Home Document List Open ▾ Send To ▾ Dashboa **Go directly to:** 📁 Document List ⭐ My Favorites 📁 My Inbox
5. ☐	If the **Security Warning** message appears, click **Yes**	Security Information This page contains both secure and nonsecure items. Do you want to display the nonsecure items? [Yes] [No] [More Info]

Selecting the Report

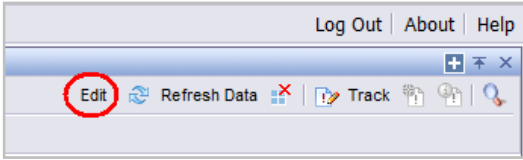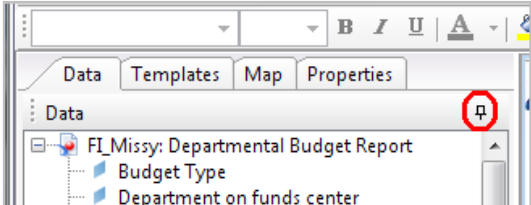|		
6. ☐	Click on **Expand** to the left of **Public Folders**	📁 📂	🔄 New ▾ Add ▾ ⊟ All ⭐ My Favorites ✉ Inbox ⊞ 📁 Public Folders
7. ☐	Click on **Training** **Note:** You may need to scroll to see the **Training** folder	📁 SLCM Enrollment, Students & Co ⊟ 📁 Training 📁 FI Training 📁 HR Payroll Training
8. ☐	In the report area, double-click on **FI_Missy: Departmental Budget Report**	FI_McCool: Ledger - Funds Center Balances - Budget vs Actual (Funds Center Balances - Budget vs Actual) Webi FI_Missy: Departmental Budget Repo Departmental Budget Report used for Budget vs Actual) Webi HR_Missy: Employee Information Campus information for department Webi

9. ☐	**Note:** The report should open in display mode.
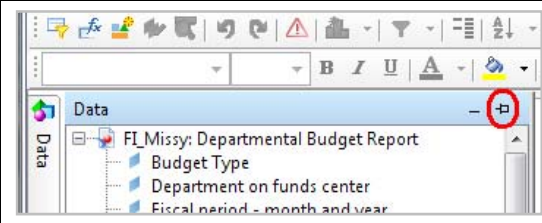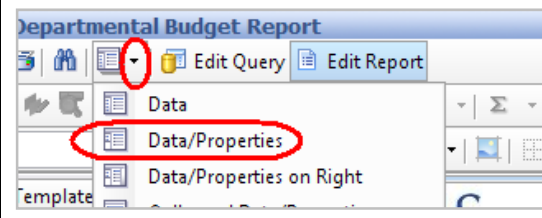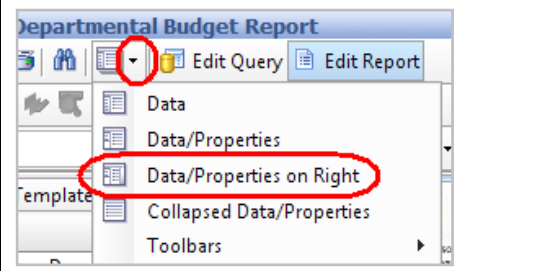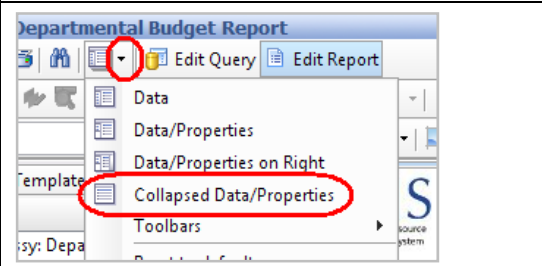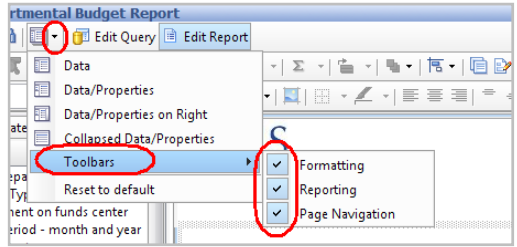
Exercise 3 – Edit Report Screen
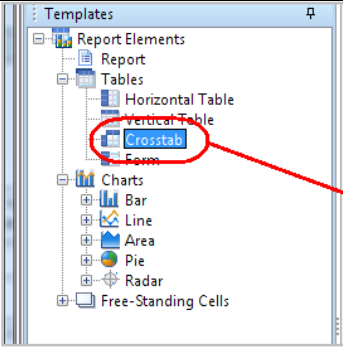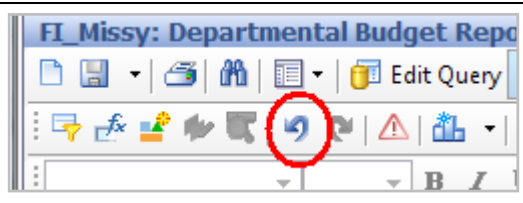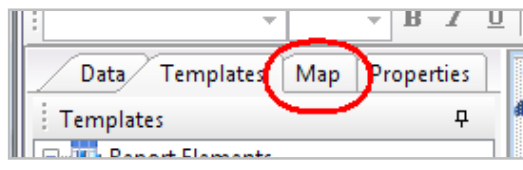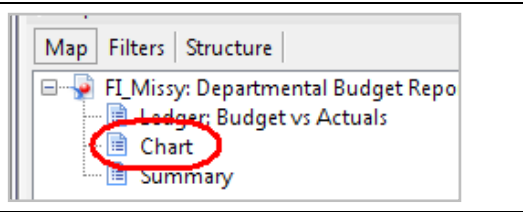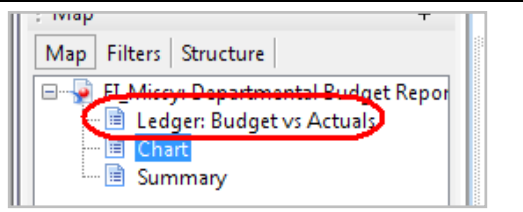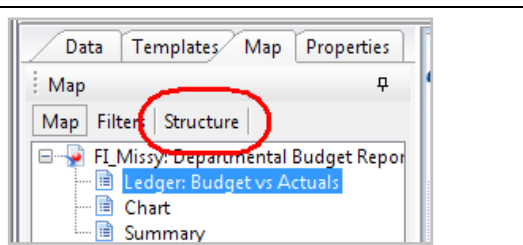
Scenario

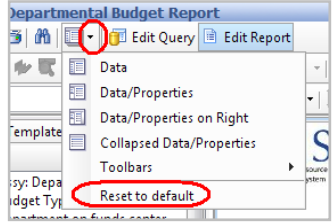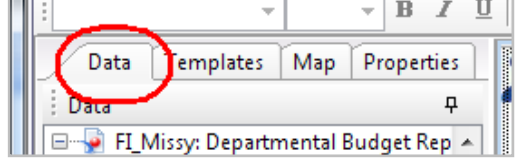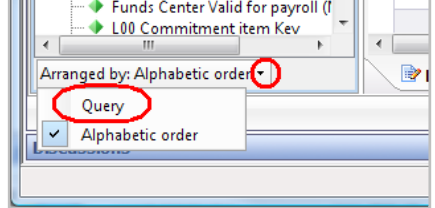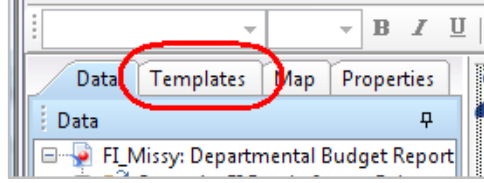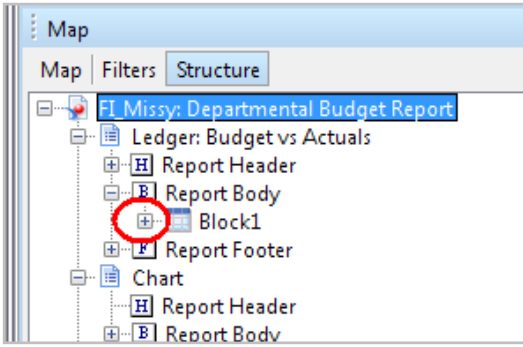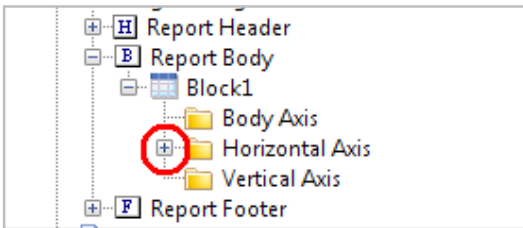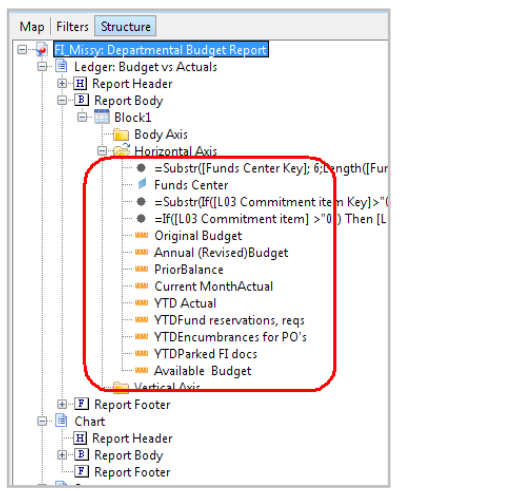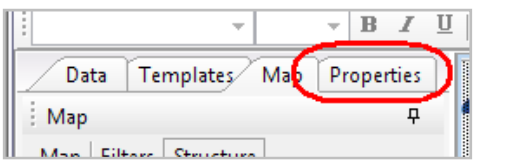You will be examining some of the features that are available on the **Edit Report** screen using the report you displayed in Exercise 2.
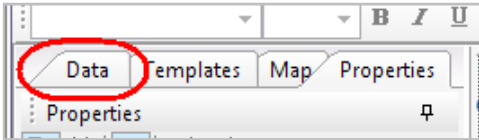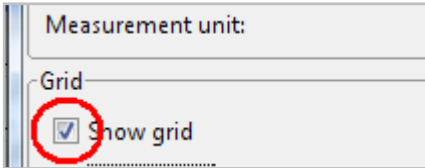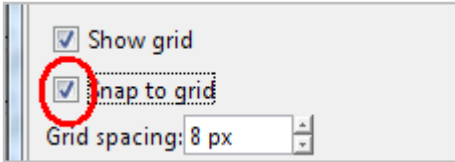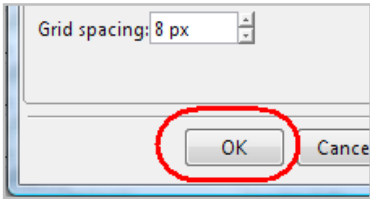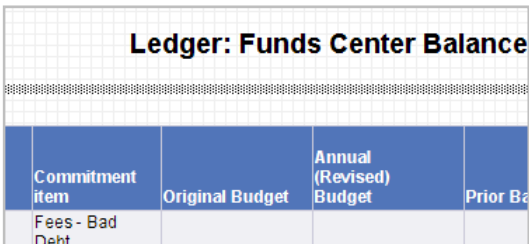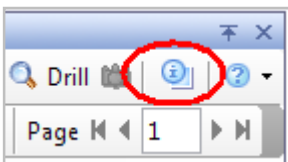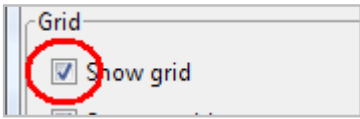
Navigating the Edit Report Screen		
1. ☐	Click **Edit** **Note:** You will need to have displayed the report previously. If you do not have the report open, complete Exercise 2 first.	
2. ☐	If the **Warning – Security** message box appears, click in the **Always trust content from this publisher** checkbox and then click **Run**	
3. ☐	**Note:** This system message is letting you know that Business Objects software is opening.	
4. ☐	**Note:** This system message is letting you know that **Java** software is opening.	
Navigating the Report Manager		
5. ☐	In the **Report Manager**, click on the **Thumbtack** to collapse the manager	
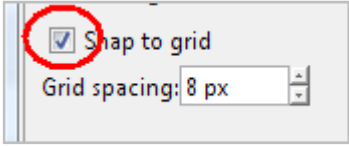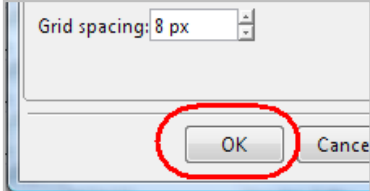
6. ☐	Click on the **Data** button to open the **Report Manager**		
7. ☐	Click on the **Thumbtack** to secure the **Report Manager** in the open mode		
8. ☐	In the menu, click **Configure Views** and select **Data/Properties** **Note:** Notice how the screen is configured.		
9. ☐	Click **Configure Views** and select **Data/Properties on Right** **Note:** Notice how the screen is configured.		
10. ☐	Click **Configure Views** and select **Collapsed Data/Properties** **Note:** Notice how the screen is configured.		

11. ☐	Click **Configure Views**, select **Toolbars**, and then deselect the three toolbars one by one: **Formatting, Reporting**, and **Page Navigation** **Note:** Did you notice which toolbar disappeared after you deselected it?	
12. ☐	Click **Reset to Default** to return the **Report Manager** to its default settings	
Report Manager – Data Tab		
13. ☐	Make sure the **Data** tab is displayed	
14. ☐	At the bottom of the **Data** tab, use the drop-down selection icon to select **Query**	
15. ☐	Take a moment to view the objects listed on the **Data** tab that are available to use in the report.	
Report Manager – Template Tab		
16. ☐	Click on the **Template** tab	
17. ☐	Change the type of table on your report by dragging and dropping the **Crosstab** table on to the data section of the report table	

18. ☐	Notice how the table changed	
19. ☐	Click **Back** to restore the table to its original look	
Report Manager – Map Tab		
20. ☐	Click on the **Map** tab	
21. ☐	In the **Map** tab, click on **Chart** to display the chart sub-report	
22. ☐	Click **Ledger Sheet** to return to the first sub-report	
23. ☐	Click on the sub-tab **Structure** to view the structure of the report	

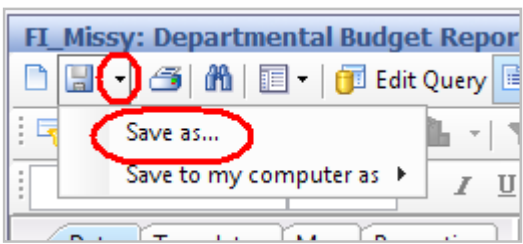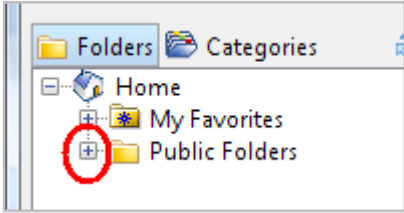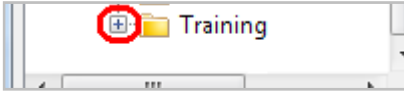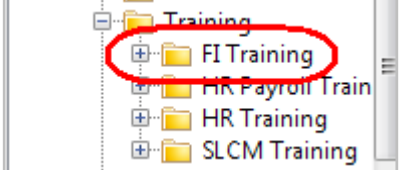|			
24.	☐	Click **Expand** to the left of **Block1** under **Report Body** under **Ledger: Budget vs Actuals**	
25.	☐	Click **Expand** to the left of **Horizontal Axis**	
26.	☐	**Note:** Notice the structure of the data in the cells in the various columns.	
	Report Manager – Properties Tab		
27.	☐	Click on the **Properties** tab	
28.	☐	Keeping an eye on the **Properties** tab, click on various areas of the report, such as the title, the data section of the table, the column headings, etc.	
29.	☐	Notice that the displayed properties are specific to the report area you clicked	
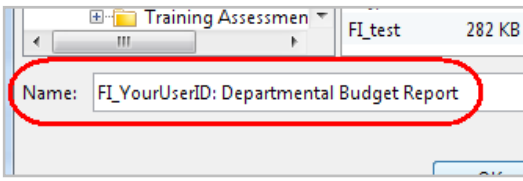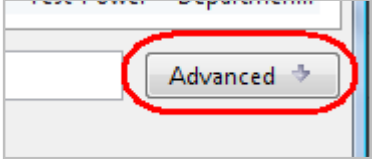
30. ☐	Click on the **Data** tab	
Using the Grids		
31. ☐	Click **Show User Settings**	
32. ☐	Click in the **Show Grid** checkbox **Note:** Adding the checkmark turns on the **Grid** option.	
33. ☐	Click in the **Snap to grid** checkbox **Note:** Adding the checkmark turns on the **Snap to grid** option.	
34. ☐	Click **OK**	
35. ☐	Notice the grid that is displayed behind the blocks on the report.	
36. ☐	Click **Show User Settings**	
37. ☐	Click in the **Show Grid** checkbox to turn off the grid display **Note:** Removing the checkmark turns off the **Grid** option.	
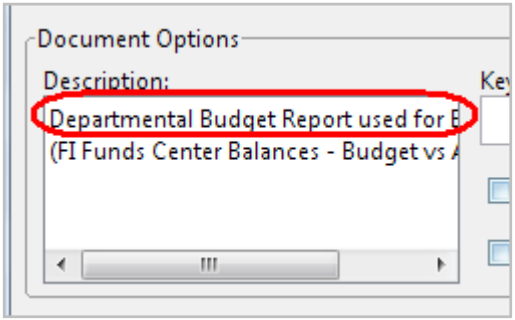
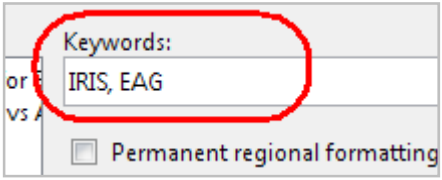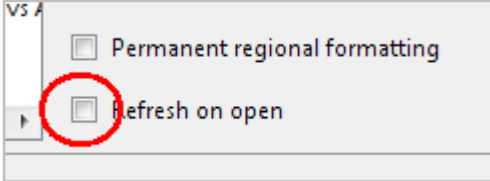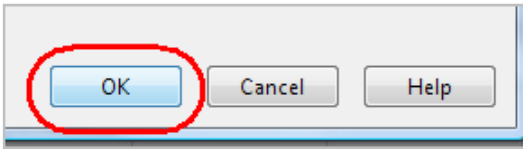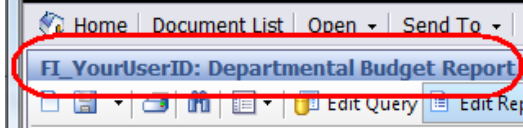|			
38. ☐	Click in the **Snap to Grid** checkbox to turn off this feature **Note:** Removing the checkmark turns off the **Snap to grid** option.	☑ Snap to grid Grid spacing: 8 px	
39. ☐	Click **OK**	Grid spacing: 8 px OK Cance	

Exercise 4 – Save an Existing Report

Scenario

You will be saving an existing report under your ID using the Business Objects Naming Standards.
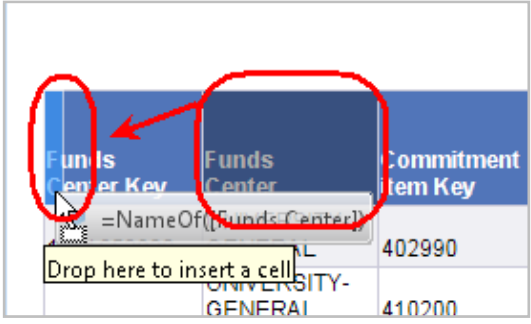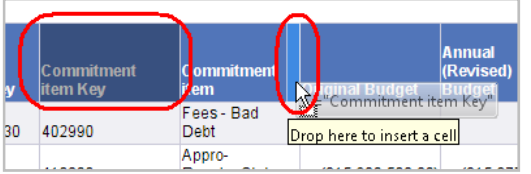
	Saving the Report Under Your ID	
1. ☐	Click on the **Save** drop-down and select **Save As** **Note:** You will be saving the report you displayed in Exercise 2 and 3 under your ID.	
2. ☐	Click on **Expand** to the left of **Public Folders**	
3. ☐	Click on **Expand** to the left of **Training**	
4. ☐	Click on **FI Training** to select the folder	
5. ☐	Change the **Name** using the BOBJ Naming Standards **Example**: FI_UserID: A&S Budget Report	
6. ☐	Click **Advanced**	

| 7. ☐ | In the **Description** field, change the description, but leave the Universe name as it is

Note: The Universe name will be in parentheses (Universe Name) | Document Options
Description: Key
Departmental Budget Report used for B
(FI Funds Center Balances - Budget vs A |
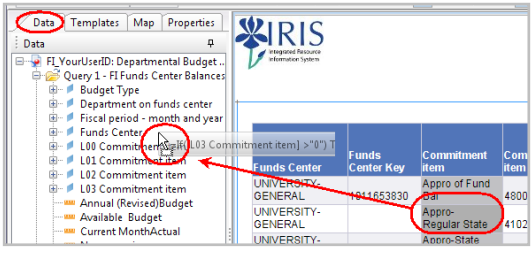|---|---|---|
8. ☐	Enter one or two **Key Words** separated by a comma	Keywords: IRIS, EAG ☐ Permanent regional formatting
9. ☐	Make sure that **Refresh on Open** is **NOT** checked	☐ Permanent regional formatting ☐ Refresh on open
10. ☐	Click **OK**	OK Cancel Help
11. ☐	Notice the new name of the report in the report window header	Home	Document List	Open ▾	Send To ▾ | **FI_YourUserID: Departmental Budget Report** Edit Query Edit Rep

Exercise 5 – Modify Existing Report

Scenario

You will be modifying an existing report by adding objects, swapping columns, changing the report title, and refreshing the data.
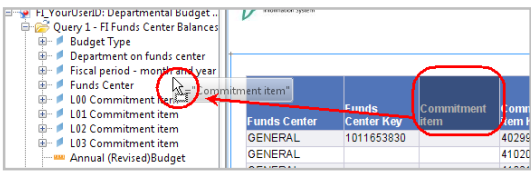
	Rearranging Columns	
1. ☐	Click on the **Funds Center** column heading and drag/drop it to the left of the **Funds Center Key** heading	
2. ☐	Notice that the two columns have been swapped	
3. ☐	Click on the **Commitment Item Key** column heading and drag/drop it to the left side of the **Funds Center Key** column	
4. ☐	**Note:** The **Commitment Item Key** header should have moved, but the data stayed in the original space.	
5. ☐	Click on the **Commitment Item Key** data and drag/drop it to the data section under the **Commitment Item Key** column heading	

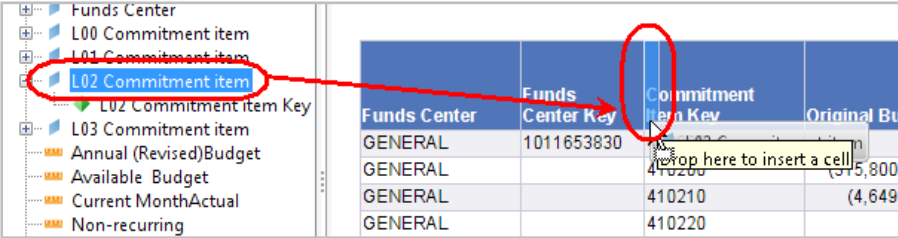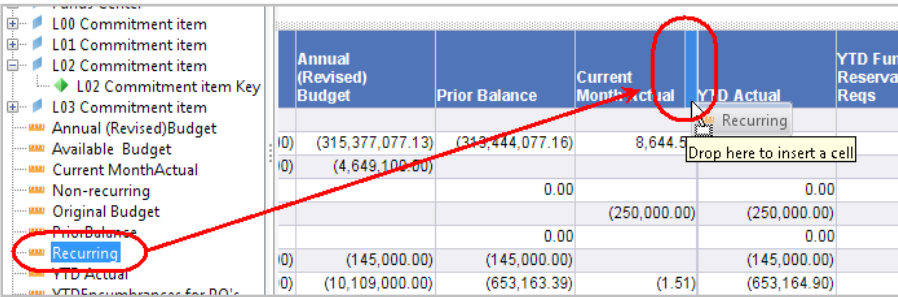| Removing Objects		
6. ☐	Click in the **Commitment Item** data and drag/drop it on the **Data** tab in the **Report Manager**	
7. ☐	Click on the **Commitment Item** column heading and drag/drop it on the **Data** tab in the **Report Manager**	

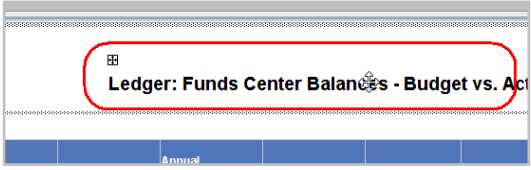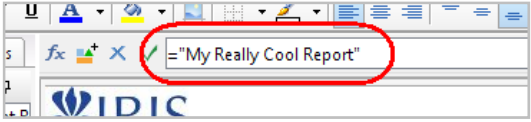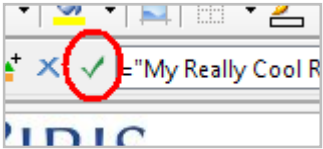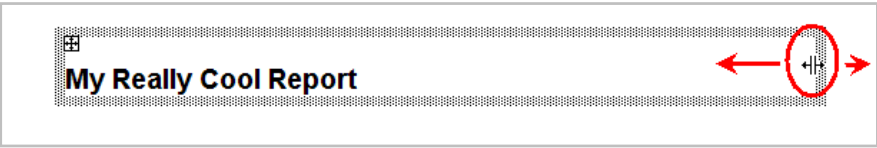| Adding Objects	
8. ☐	On the **Data** tab, find **L02 Commitment Item** dimension and drag it to the left of the **Commitment Item Key** column **Note:** This is the object you just removed from the report. Notice the name difference in the column heading.
9. ☐	Add R**ecurring** to the report by placing it to the right of **Current Monthly Actual**
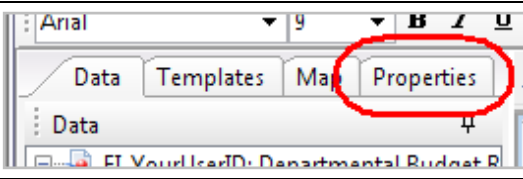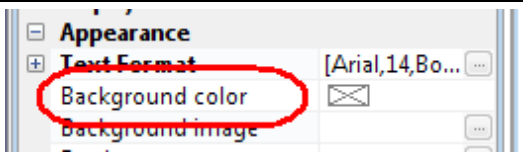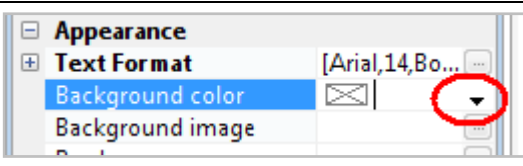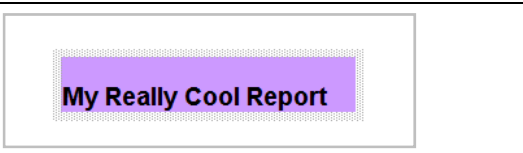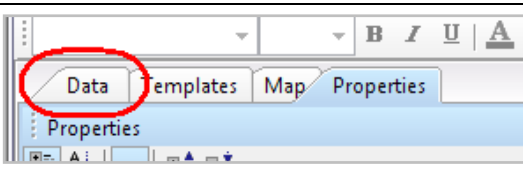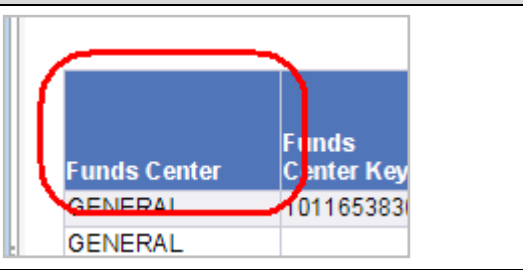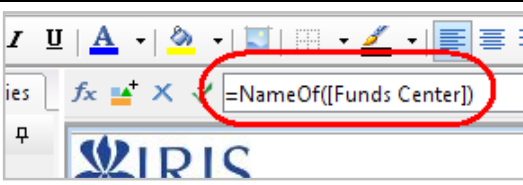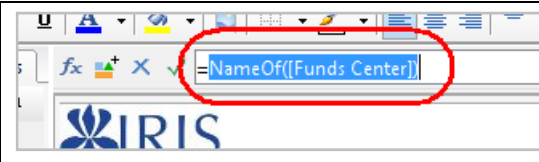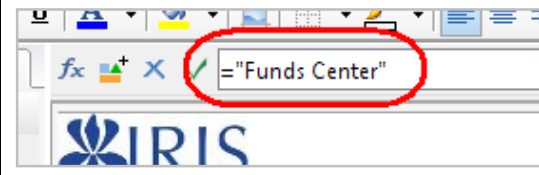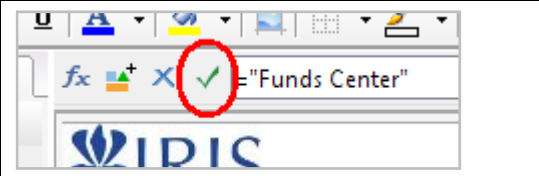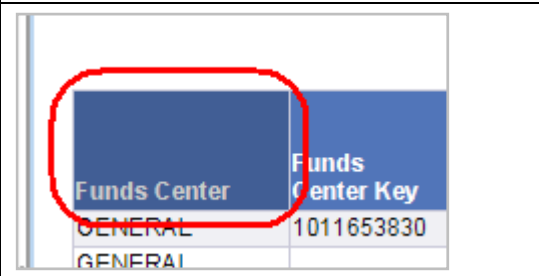
Exercise 6 – Change Titles and Headings

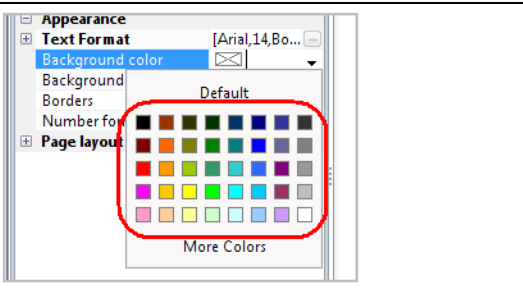## Scenario

You will be changing the report title and one column heading.

	Changing the Title of the Report	
1. ☐	Click on the title of the report	
2. ☐	Click **Show/Hide Formula Editor**	
3. ☐	Change the title to anything different than the current title. **Note:** The formula should start with an **Equals** sign (=) and be enclosed between double quotes " ".	
4. ☐	Click on **Validate**	
5. ☐	**Note:** The change will display.	
6. ☐	Change the length of the title text box to fit the new title	
7. ☐	Click on the report title	
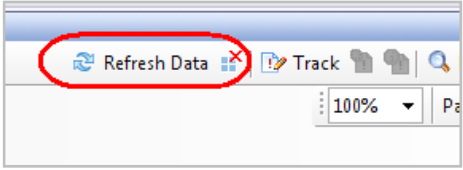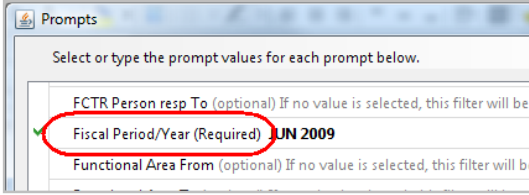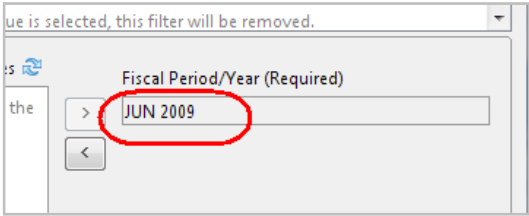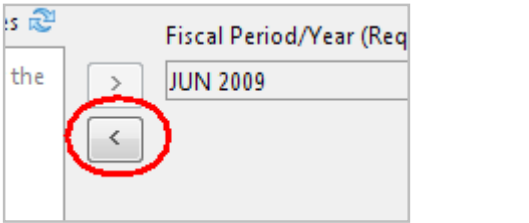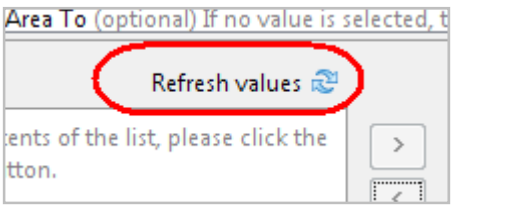
8. ☐	Click on the **Properties** tab	
9. ☐	Click **Background Color**	
10. ☐	Click on the drop-down icon	
11. ☐	Choose a color for the background of your title by clicking on the color	
12. ☐	**Note:** Your title should now have a new background color.	My Really Cool Report
13. ☐	Click on the **Data** tab	
Changing the Column Heading		
14. ☐	Click on the **Funds Center** column heading	
15. ☐	**Note:** The formula for the **Funds Center** column heading should appear in the Formula Editor toolbar	=NameOf([Funds Center])
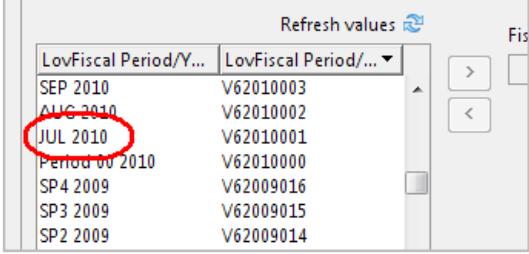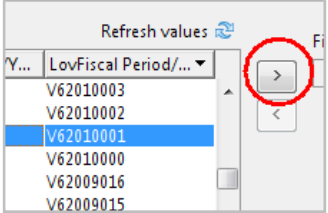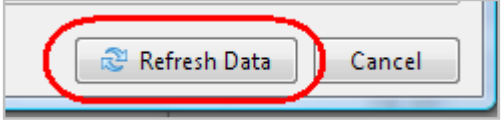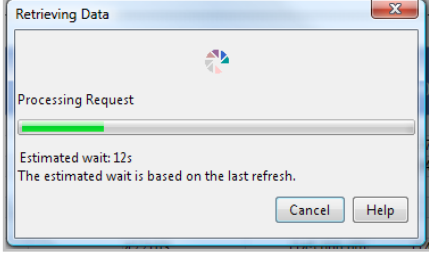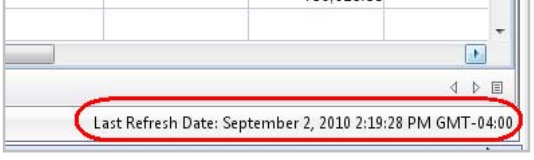
16. ☐	Highlight **NameOf([Funds Center])**	
17. ☐	Change it to **"Funds Center"** **Note:** Be sure to leave the equals sign (=)	
18. ☐	Click on **Validate**	
19. ☐	**Note:** The change will display, but you will not see any difference in the column heading.	

Exercise 7 – Refresh the Data

Scenario

You will be refreshing the data in the report.
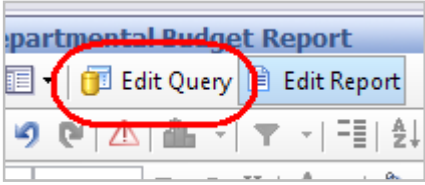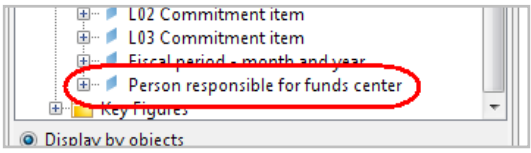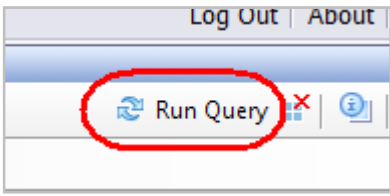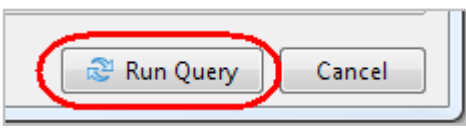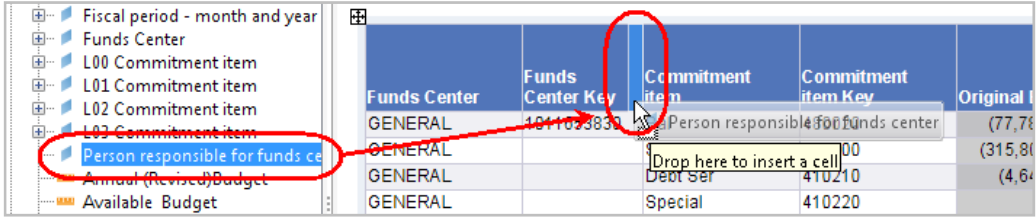
Refreshing		
1. ☐	Click **Refresh Data**	
2. ☐	In the filter list, scroll down and click on **Fiscal Period/Year (Required)**	
3. ☐	In the selected area (right side of the window), click on the date	
4. ☐	Click **Remove**	
5. ☐	Above the value list, click **Refresh values**	

6.	☐	Scroll down the value list and double-click on **JUL 2010**	
7.	☐	Click **Add**	
8.	☐	Click **Refresh Data**	
9.	☐	**Note:** A system message will appear letting you know approximately how long it will take to run the report.	
10.	☐	**Note:** The report will refresh with new data, and you will see the new **Last Refresh Date** information in the lower right corner.	

Exercise 8 – Add Objects to the Query and Report

Scenario
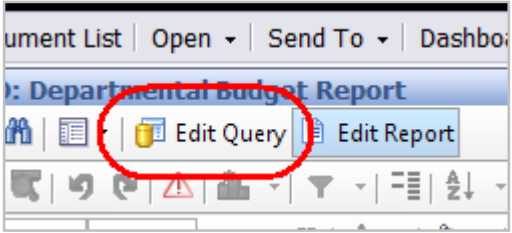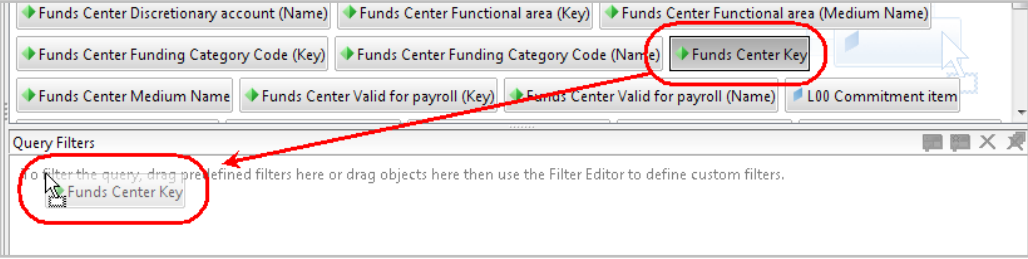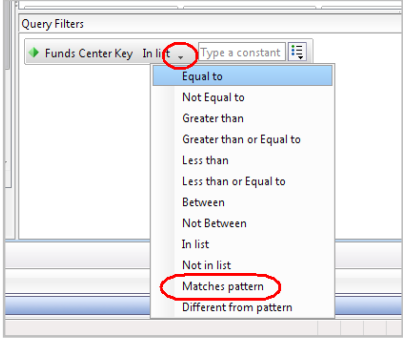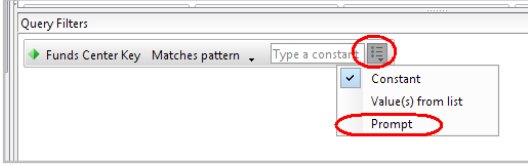
You will be modifying the report by adding objects to the query, and then adding the objects.to the report.
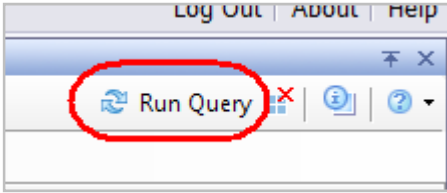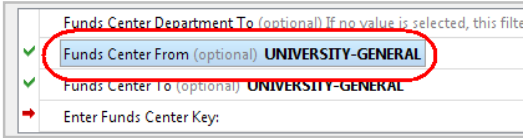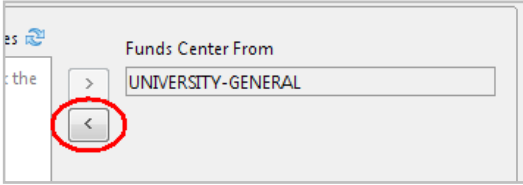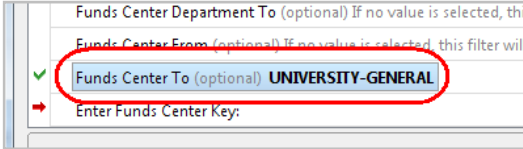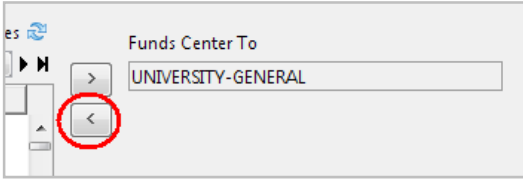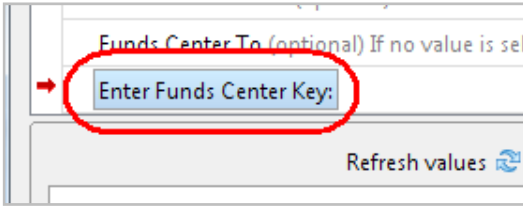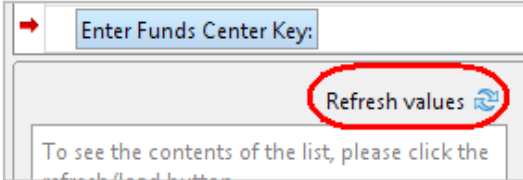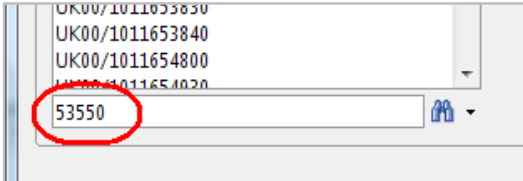
Adding the Object to the Query		
1. ☐	Click on **Edit Query**	
2. ☐	Double-click on the dimension **Person responsible for funds center**	
3. ☐	Click **Run Query**	
4. ☐	Click **Run Query**	
Adding the Object to the Report		
5. ☐	Click on **Person responsible for funds center** and drag it to the right of **Funds Center Key**		
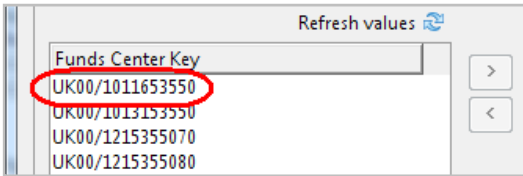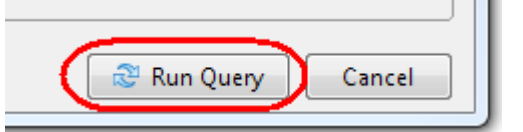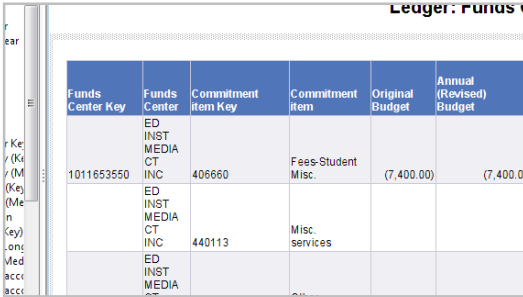
Exercise 9 – Create a Query Filter
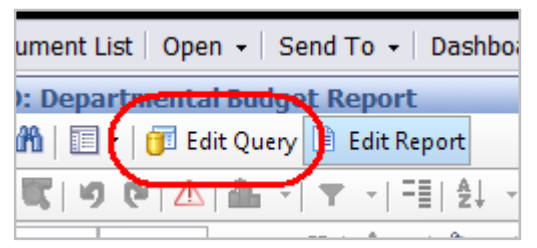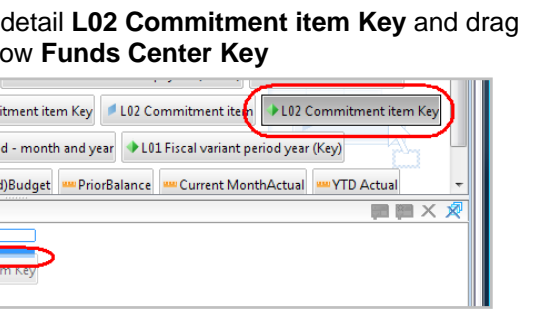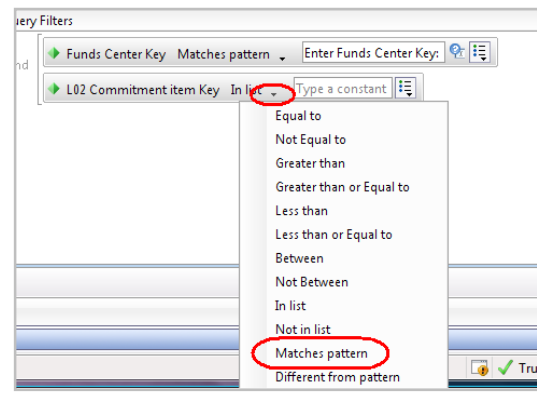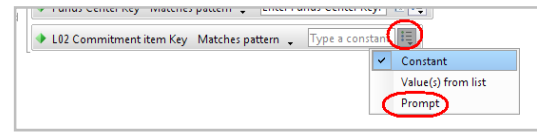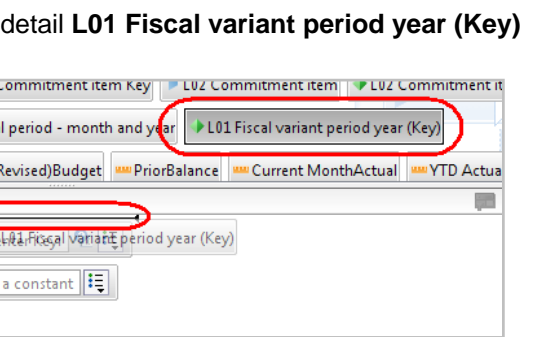
Scenario
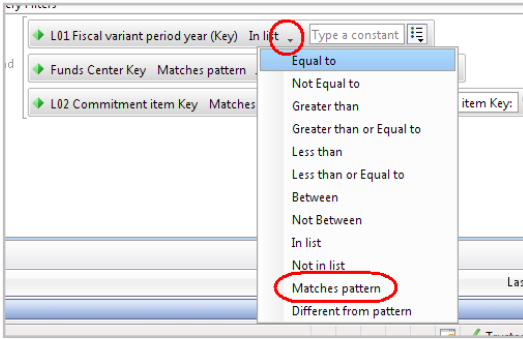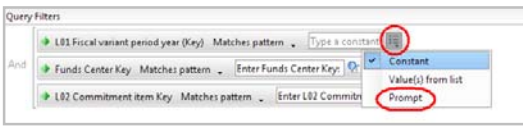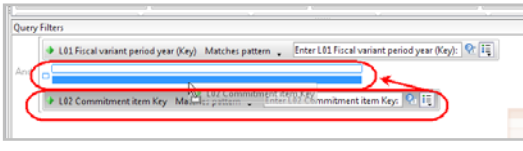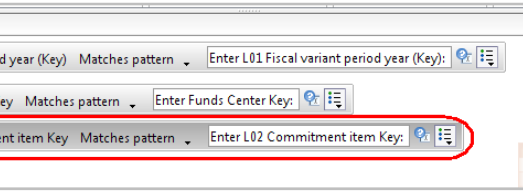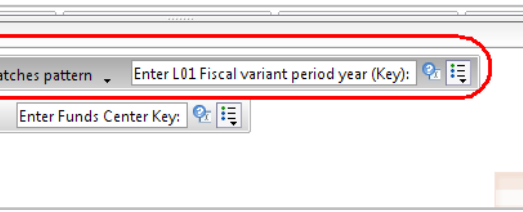
First, you will be creating a simple filter and running the report. Next, you will be creating a complex filter and running the report.

Create a Query Filter		
1. ☐	Click **Edit Query**	
2. ☐	In the **Result Objects** frame, click on the detail **Funds Center Key** and drag it to the **Query Filters** frame	
3. ☐	Click on **Operator Drop-down** and select **Matches pattern**	
4. ☐	Click on **Operand Drop-down** and select **Prompt**	

5. ☐	Click **Run Query**		
6. ☐	In the **Prompt** window, scroll down and click on **Funds Center From (optional):**		
7. ☐	Click on **Remove**		
8. ☐	In the **Prompt** window, scroll down and click on **Funds Center To (optional):**		
9. ☐	Click on **Remove**		
10. ☐	In the **Prompt** window, scroll down and click on **Enter Funds Center Key:**		
11. ☐	Click on **Refresh values**		
12. ☐	In the **Search** box, type **53550**		

13. ☐	Press **Enter**	
14. ☐	Double-click on **UK00/101163550**	
15. ☐	Click **Run Query**	
16. ☐	**Note:** The new data will display in your report	

Create a Complex Filter		
20. ☐	Click **Edit Query**	
21. ☐	In the **Result Objects** frame, click on the detail **L02 Commitment item Key** and drag it to the **Query Filters** frame placing it below **Funds Center Key**	
22. ☐	Click on **Operator Drop-down** and select **Matches pattern**	
23. ☐	Click on **Operand Drop-down** and select **Prompt**	
24. ☐	In the **Result Objects** frame, click on the detail **L01 Fiscal variant period year (Key)** and drag it to the **Query Filters** frame	
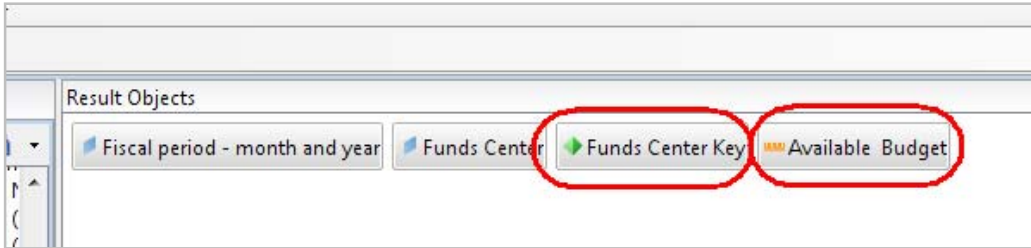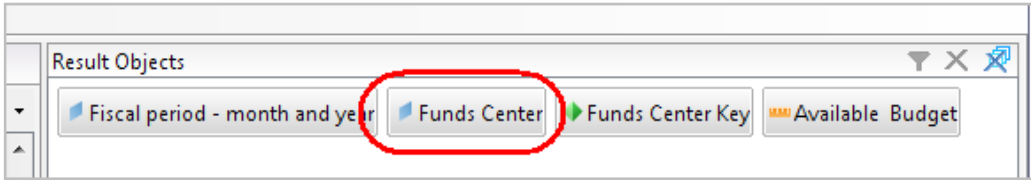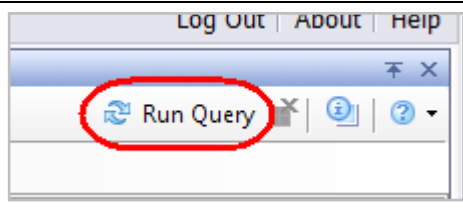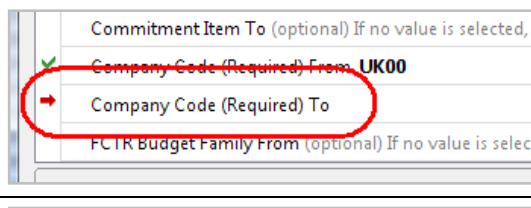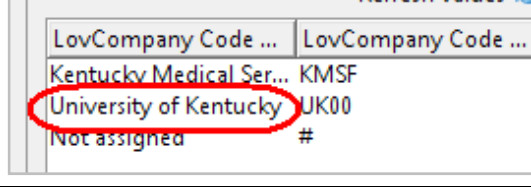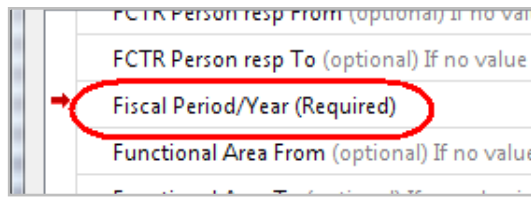
25. ☐	Click on **Operator Drop-down** and select **Matches pattern**	
26. ☐	Click on **Operand Drop-down** and select **Prompt**	
27. ☐	Click on **L02 Commitment item Key** and drag it on top of **Funds Center Key** so that it will group the two filters below and to the right of **L01 Fiscal variant period year (Key)**	
28. ☐	**Note:** Notice how the filters are aligned.	

Remove a Query Filter

30. ☐	Click on **L02 Commitment item Key** and drag it to the **Data Manager**	
31. ☐	Click on **Key L01 Fiscal variant period year (Key)** and drag it to the **Data Manager**	
32. ☐	Notice that on **L01 Fiscal variant period year (Key)** and **L02 Commitment item Key** remain in the **Result Objects** frame	
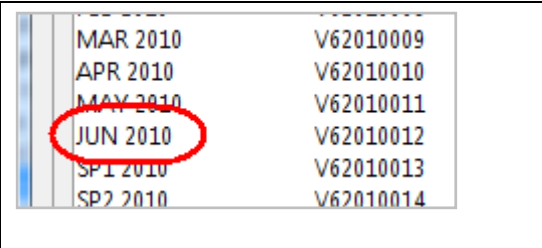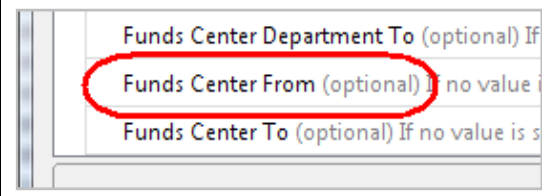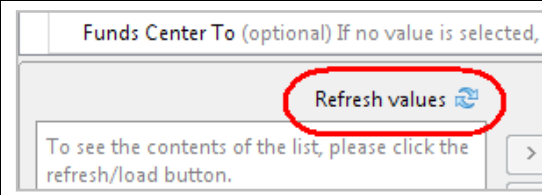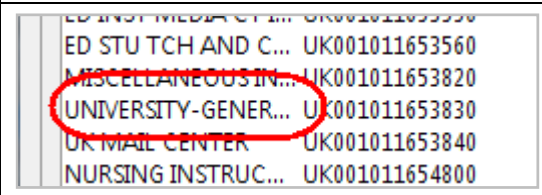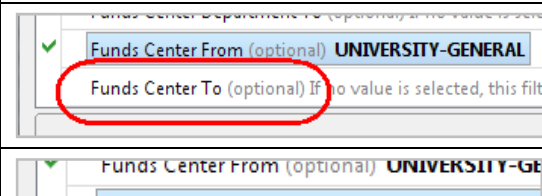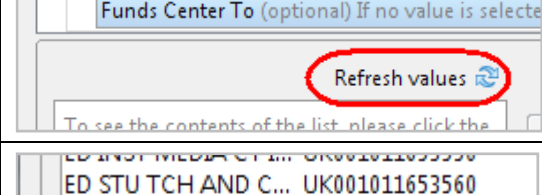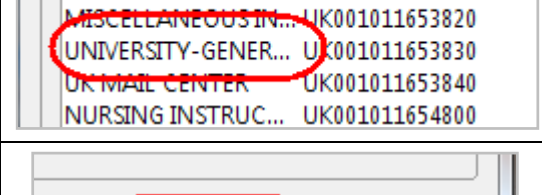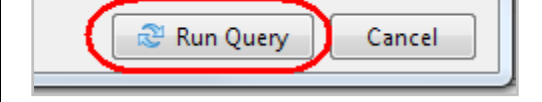
Exercise 10 – Creating a New Query/Report
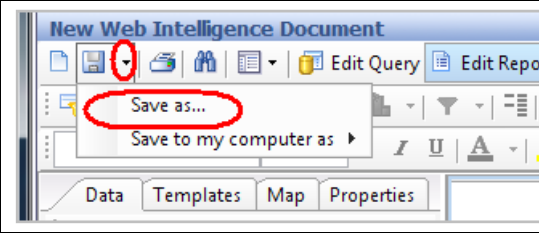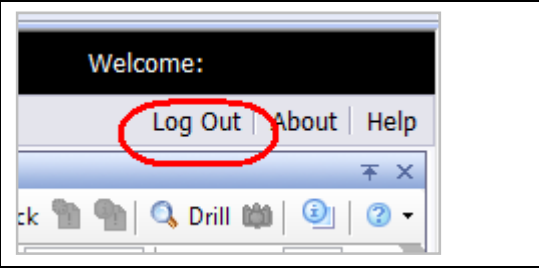
Scenario

You will be creating a new query and running the report based on the query. You will be using the current report's Universe.

1. ☐	While in the query from Exercise 8, click on **New**	
2. ☐	When the system message appears, click **Yes**	
3. ☐	**Note:** The screen will be ready for you to build your query.	
4. ☐	In the **Report Manager**, double-click on (Dimension) **Fiscal period – month and year**	

5. ☐	Add the following objects in this order:
	   • (Detail) **Fund Center Key**
	   • (Measure) **Available Budget**
	
	Result Objects
	Fiscal period - month and year | Funds Center | ▶Funds Center Key | Available Budget
	
	Note: When you send the detail **Fund Center Key** to the **Result Objects** frame, the dimension **Funds Center** will move also.
	
	Result Objects ▼ ✕ 📌
	Fiscal period - month and year | Funds Center | ▶Funds Center Key | Available Budget		

6. ☐	Click **Run Query**	Log Out | About | Help ⤒ ✕ 🔁 Run Query ✖ ⓘ ❓ ▾
7. ☐	In the **Prompt** window, scroll down and click on **Company Code (Required) To**	Commitment Item To (optional) If no value is selected, ✓ Company Code (Required) From **UK00** ➡ Company Code (Required) To FCTR Budget Family From (optional) If no value is selec
8. ☐	Double-click on the value **University of Kentucky**	LovCompany Code ... | LovCompany Code ... Kentucky Medical Ser... | KMSF University of Kentucky | UK00 Not assigned | #
9. ☐	Scroll down in the **Prompt** window and click on **Fiscal Period/Year (Required)**	FCTR Person resp From (optional) If no valu FCTR Person resp To (optional) If no value ➡ Fiscal Period/Year (Required) Functional Area From (optional) If no value

10.	☐	Scroll down and double-click on the value **JUN 2010**	MAR 2010 V62010009 APR 2010 V62010010 MAY 2010 V62010011 JUN 2010 V62010012 SP1 2010 V62010013 SP2 2010 V62010014
11.	☐	Scroll down in the **Prompt** window and click on **Funds Center From (optional)**	Funds Center Department To (optional) If Funds Center From (optional) If no value i Funds Center To (optional) If no value is s
12.	☐	Click on **Refresh values**	Funds Center To (optional) If no value is selected, Refresh values 🔁 To see the contents of the list, please click the refresh/load button.
13.	☐	Double-click on the value **UNIVERSITY-GENERAL**	ED INST MEDIA CT 1... UK001011653550 ED STU TCH AND C... UK001011653560 MISCELLANEOUS IN... UK001011653820 UNIVERSITY-GENER... UK001011653830 UK MAIL CENTER UK001011653840 NURSING INSTRUC... UK001011654800
14.	☐	Scroll down in the **Prompt** window and click on **Funds Center To (optional)**	✓ Funds Center From (optional) **UNIVERSITY-GENERAL** Funds Center To (optional) If no value is selected, this filt
15.	☐	Click on **Refresh values**	✓ Funds Center From (optional) **UNIVERSITY-GE** Funds Center To (optional) If no value is selecte Refresh values 🔁 To see the contents of the list, please click the
16.	☐	Double-click on the value **UNIVERSITY-GENERAL**	ED INST MEDIA CT 1... UK001011653550 ED STU TCH AND C... UK001011653560 MISCELLANEOUS IN... UK001011653820 UNIVERSITY-GENER... UK001011653830 UK MAIL CENTER UK001011653840 NURSING INSTRUC... UK001011654800
17.	☐	Click **Run Query**	🔁 Run Query Cancel

18. ☐	Save the report being sure to use the BOBJ naming standards.	
19. ☐	Make edits to the new report by doing any or all of the following: • Changing the report title • Changing the properties of the table to auto fit the width and the height of the table cells • Add new dimension, detail and measure objects • Swap dimensions and details	
20. ☐	Save your changes	
21. ☐	Exit the report by clicking on **Log Out** and closing the window	

Exercise 11 – Take BI_BOBJ_301 Assessment

1. ☐	Follow the steps provided in the BI_BOBJ_301 assessment you received when you obtained your BOBJ training access
	Note: The assessment should have been attached to the BOBJ training access confirmation email. If you do not have it or would like to request an assessment for a different module, please contact IRIS Training at IRISTraining@email.uky.edu
2. ☐	Make sure you save your report in the appropriate training folder under the appropriate module.
	Note: For example, if you are completing an FI assessment, save it to the FI Training folder.
3. ☐	Make sure you are using the appropriate BOBJ naming standards!
4. ☐	Double-check your work before submitting. Did you add all the objects you should have added and removed any objects that should have been removed?
5. ☐	Remember! If you have questions while taking the assessment, you can contact IRIS Training at IRISTraining@email.uky.edu
6. ☐	When you are finished with the assessment, submit it to IRIS Training at IRISTraining@email.uky.edu with the following information: • Your name • Title of the report • Your AD/MC User ID • Name of the BOBJ folder