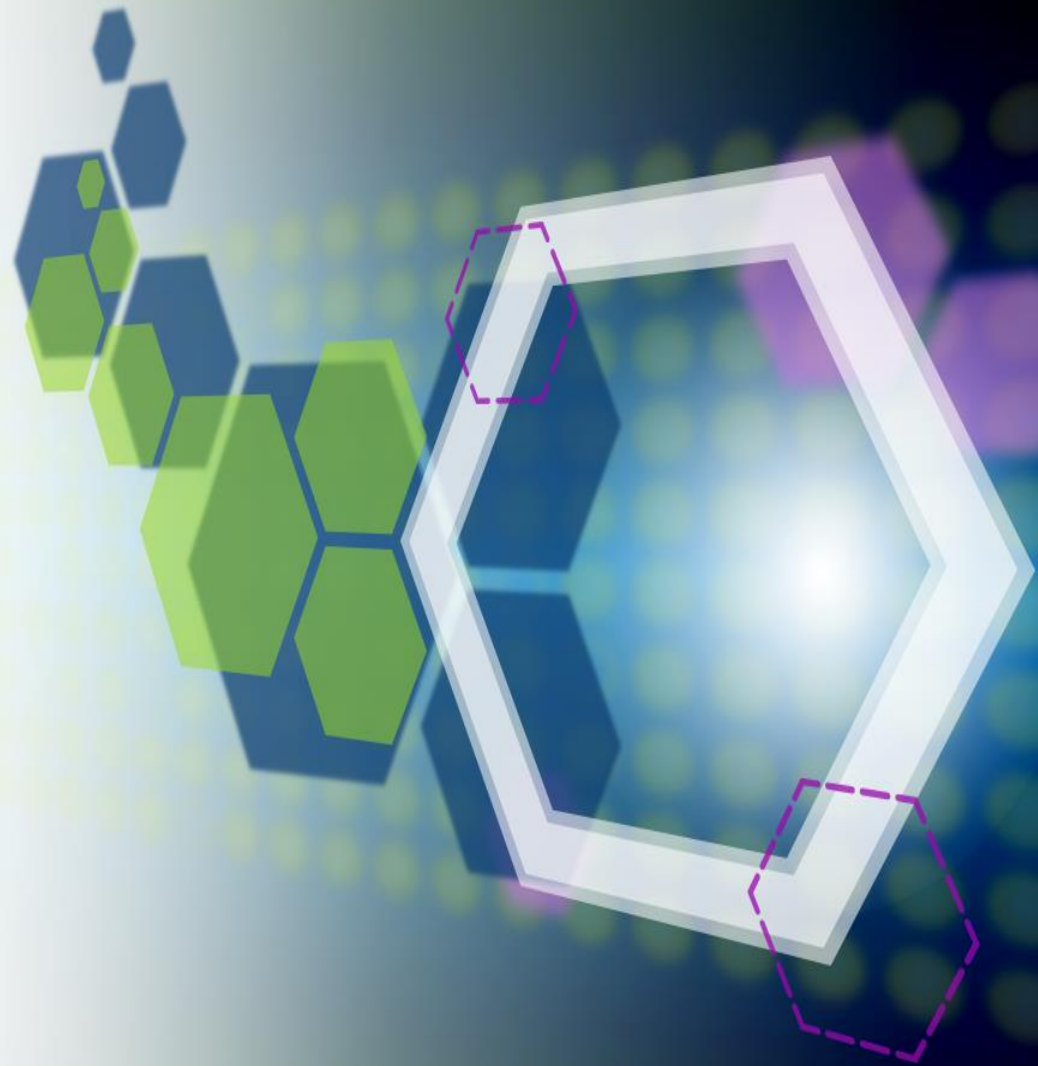


# Enterprise Reporting

Introduction to Web Intelligence



"the consolidated technology services agency -RCW 43.105.006"

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

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

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

# Chapter 1

---

## Overview



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# *Web Intelligence vs. Standard Reports*

---

## **Standard Reports**

- Pre-defined reports
- Report scheduling and viewing application

## **Web Intelligence**

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

## ER Hours of Operation

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

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

## Getting Support

- 8:00 a.m. to 5:00 p.m. Monday through Friday
- 360-407-9100
- [solutionscenter@watech.wa.gov](mailto:solutionscenter@watech.wa.gov)

# Chapter 2

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## Web Intelligence Access



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

This guide only includes information for access within the SGN.

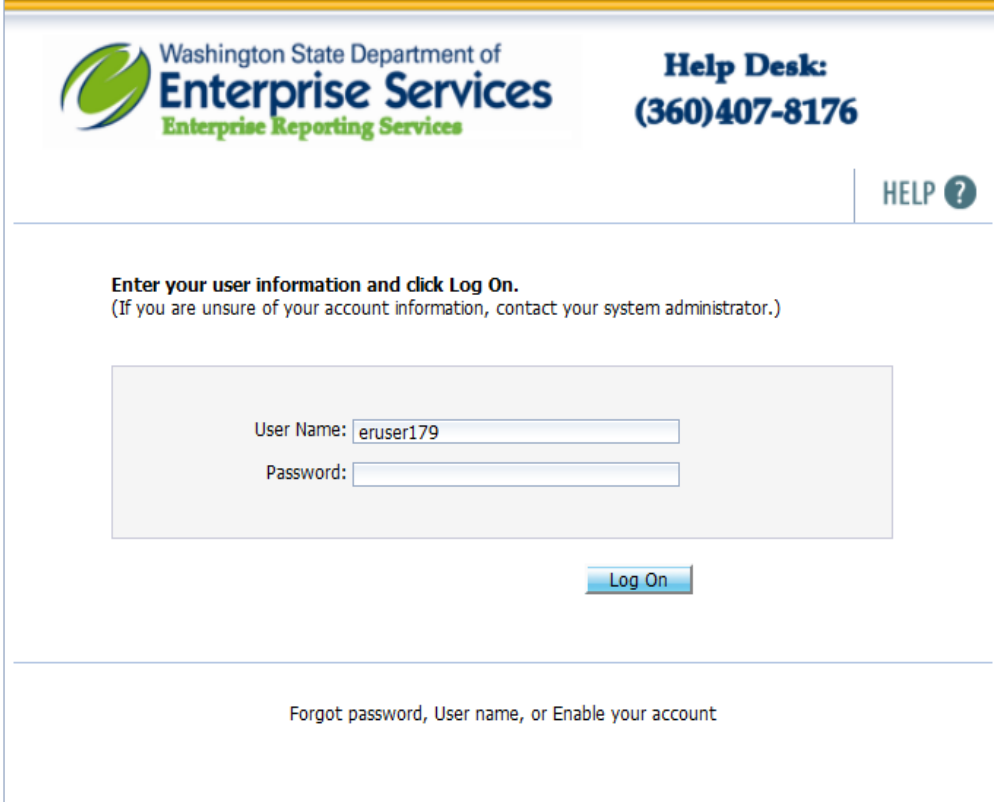
For access using SAW please consult the instructions at:

[http://des.wa.gov/SiteCollectionDocuments/ITSolutions/EnterpriseReporting/SAW\\_Instructions/BO\\_4.0\\_SAW\\_Instructions.pdf](http://des.wa.gov/SiteCollectionDocuments/ITSolutions/EnterpriseReporting/SAW_Instructions/BO_4.0_SAW_Instructions.pdf)



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

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



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

The hardened password criteria is as follows:

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

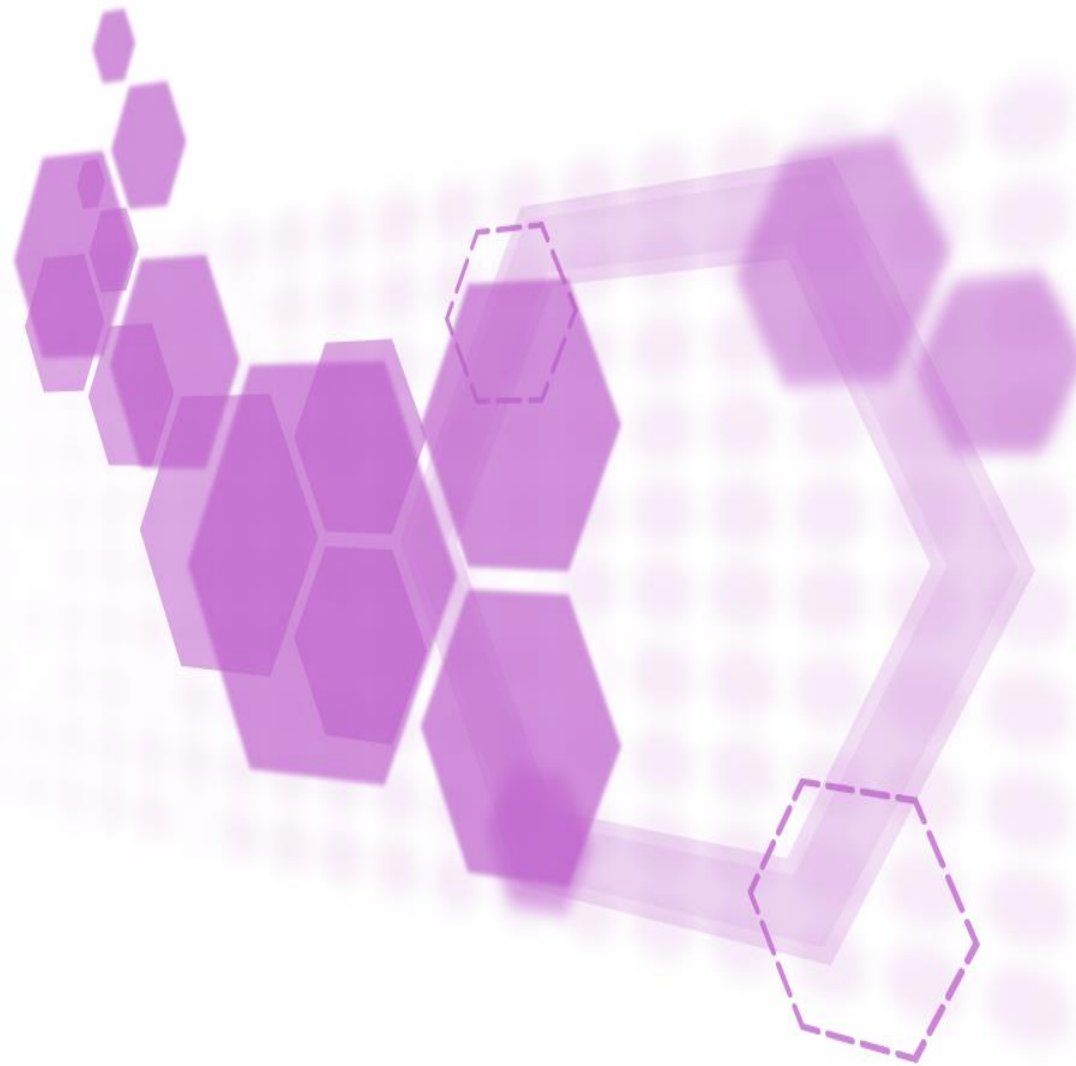
# Chapter 3

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## BI Launch Pad Navigation



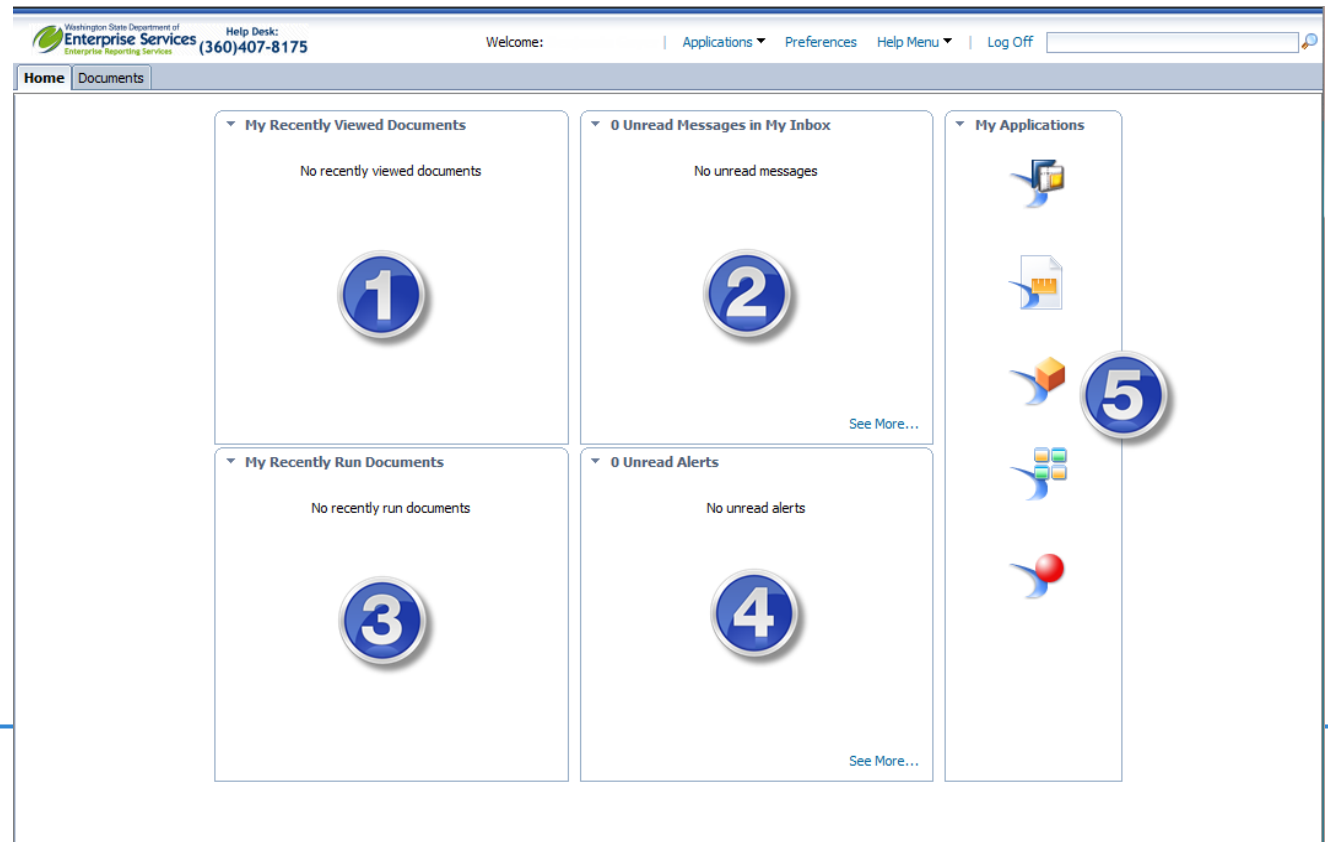
"the consolidated technology services agency -RCW 43.105.006"



# BI Launch Pad Navigation

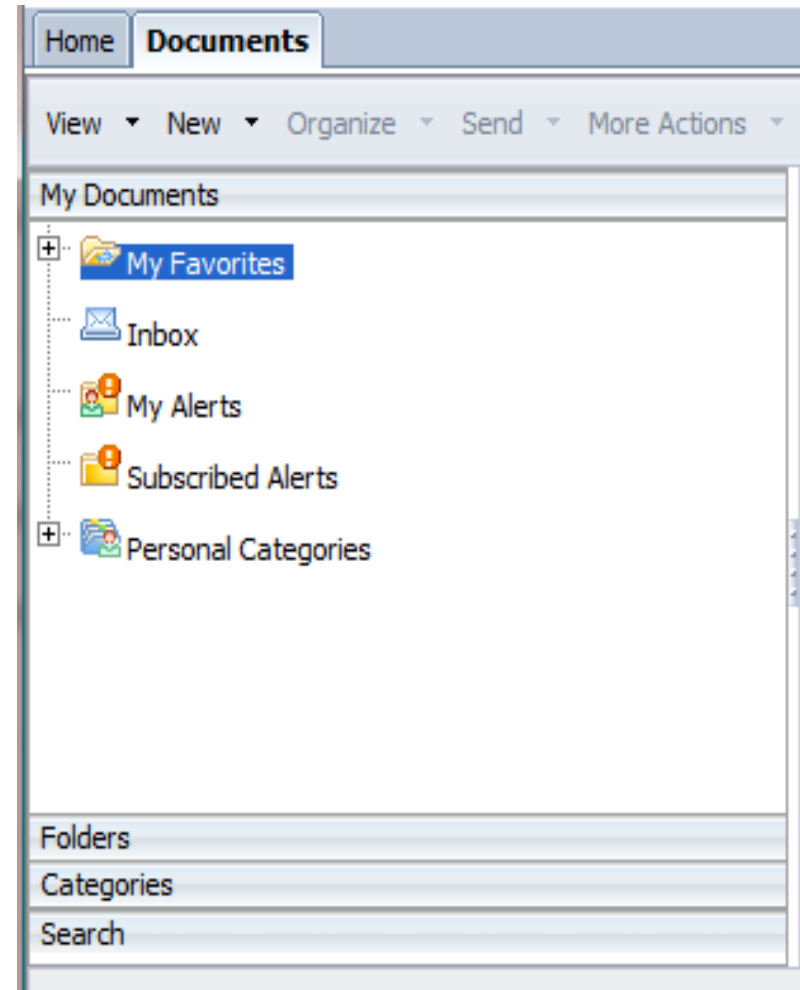
The “Home” tab allows for quick access to:

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



The “Documents” tab allows access to

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



# Chapter 4

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## Creating New Web Intelligence Documents



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# *Creating New Web Intelligence Documents*

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

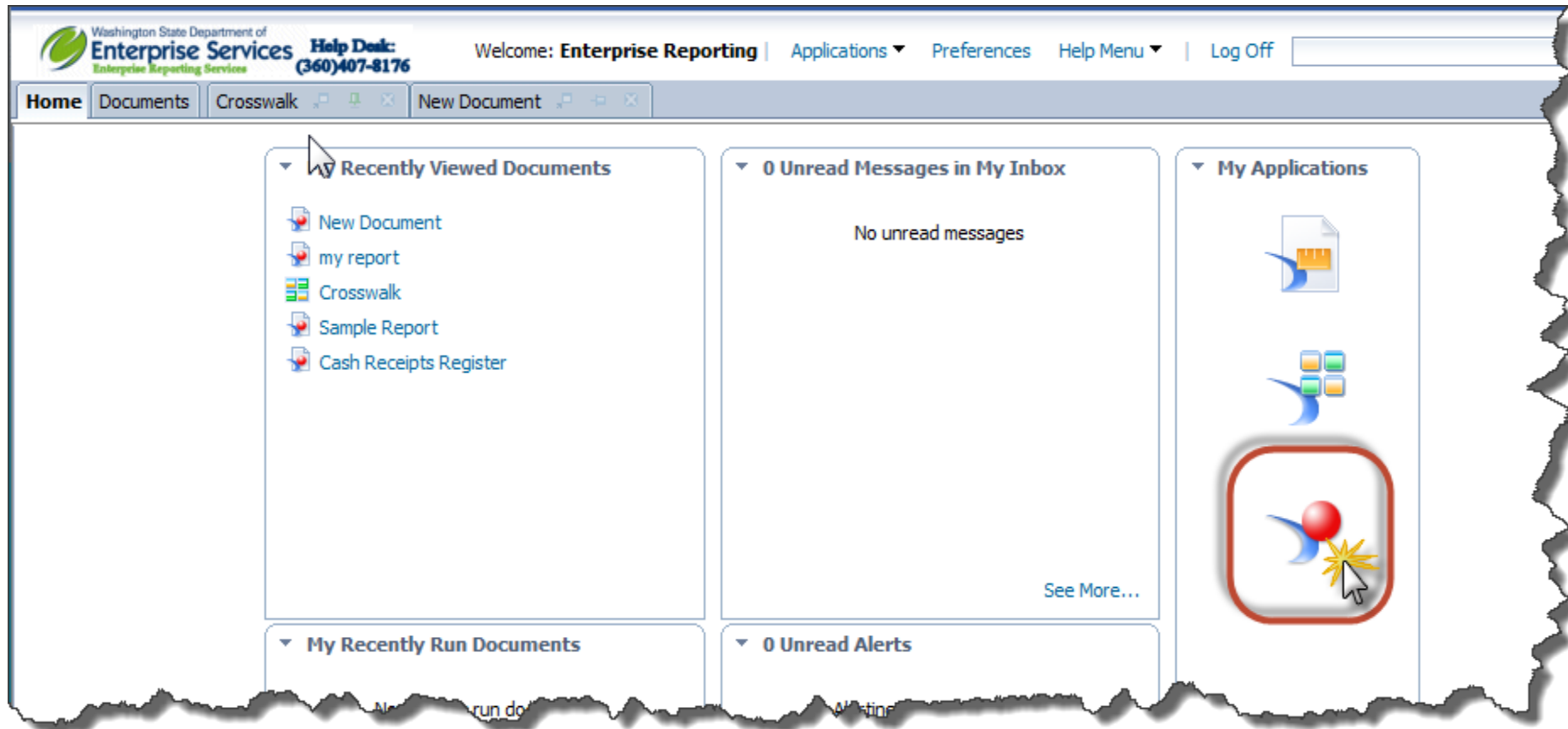
The document can be very simple or very complex, depending on the user's business need at the time.

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

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

# Creating New Web Intelligence Document

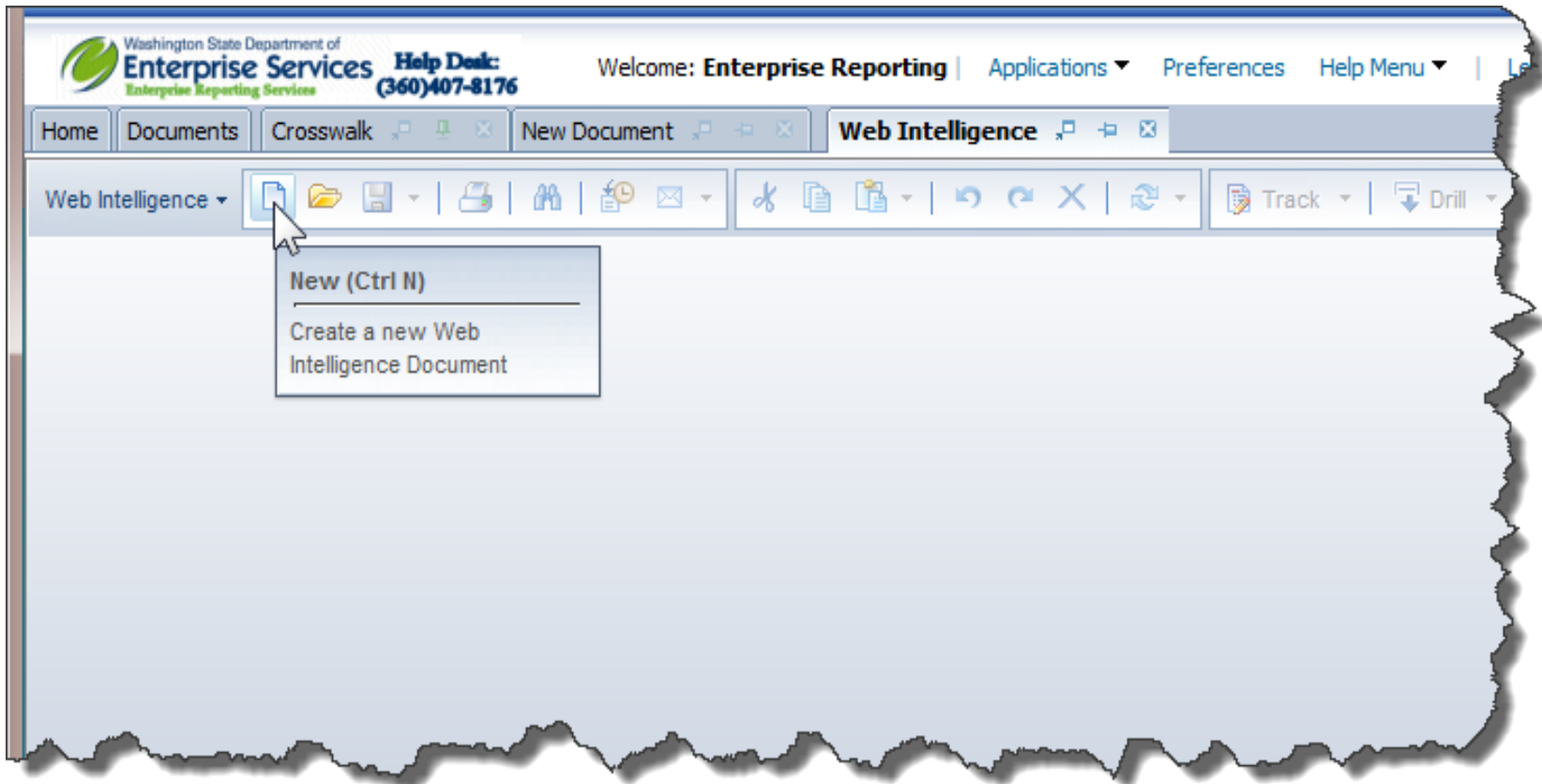
1. To create a new Web Intelligence document , click on the **Web Intelligence** icon in the **My Applications** panel.





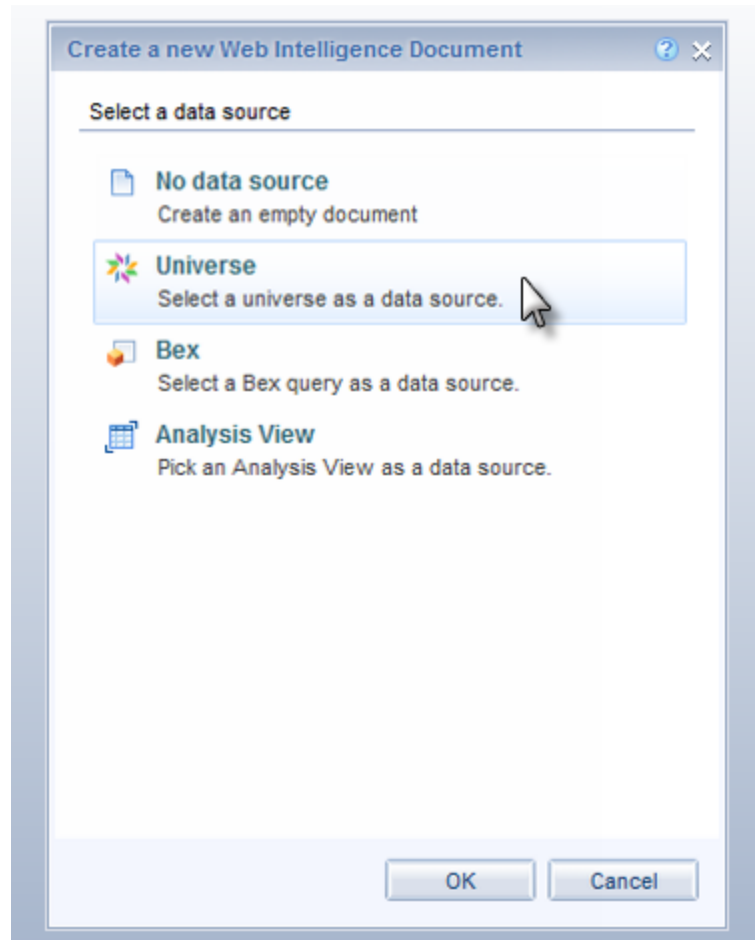
# Creating New Web Intelligence Document

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



# Creating New Web Intelligence Document

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



# Creating New Web Intelligence Document

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

Universe

Select a universe for the query.

Type here to filter table

Available Universes: [Refresh universe list](#)

State	Name	Revision	Folder
+	AFRS 1999	179	@BIR4/
+	AFRS 2001	178	@BIR4/
+	AFRS 2003	177	@BIR4/
+	AFRS 2005	176	@BIR4/
+	AFRS 2007	175	@BIR4/
+	AFRS 2009	174	@BIR4/
+	AFRS 2011	173	@BIR4/
+	AFRS 2013	172	@BIR4/
+	AFRS Titles	42	@BIR4/
+	eFashion	127	@BIR4/
+	Fund Reference Manual	6	@BIR4/
+	Project Control	3	@BIR4/
+	Statewide Vendor	8	@BIR4/

Help on selected universe:

Select Close

# Creating New Web Intelligence Document

---

A universe contains the following structures:

## Classes

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

## Objects

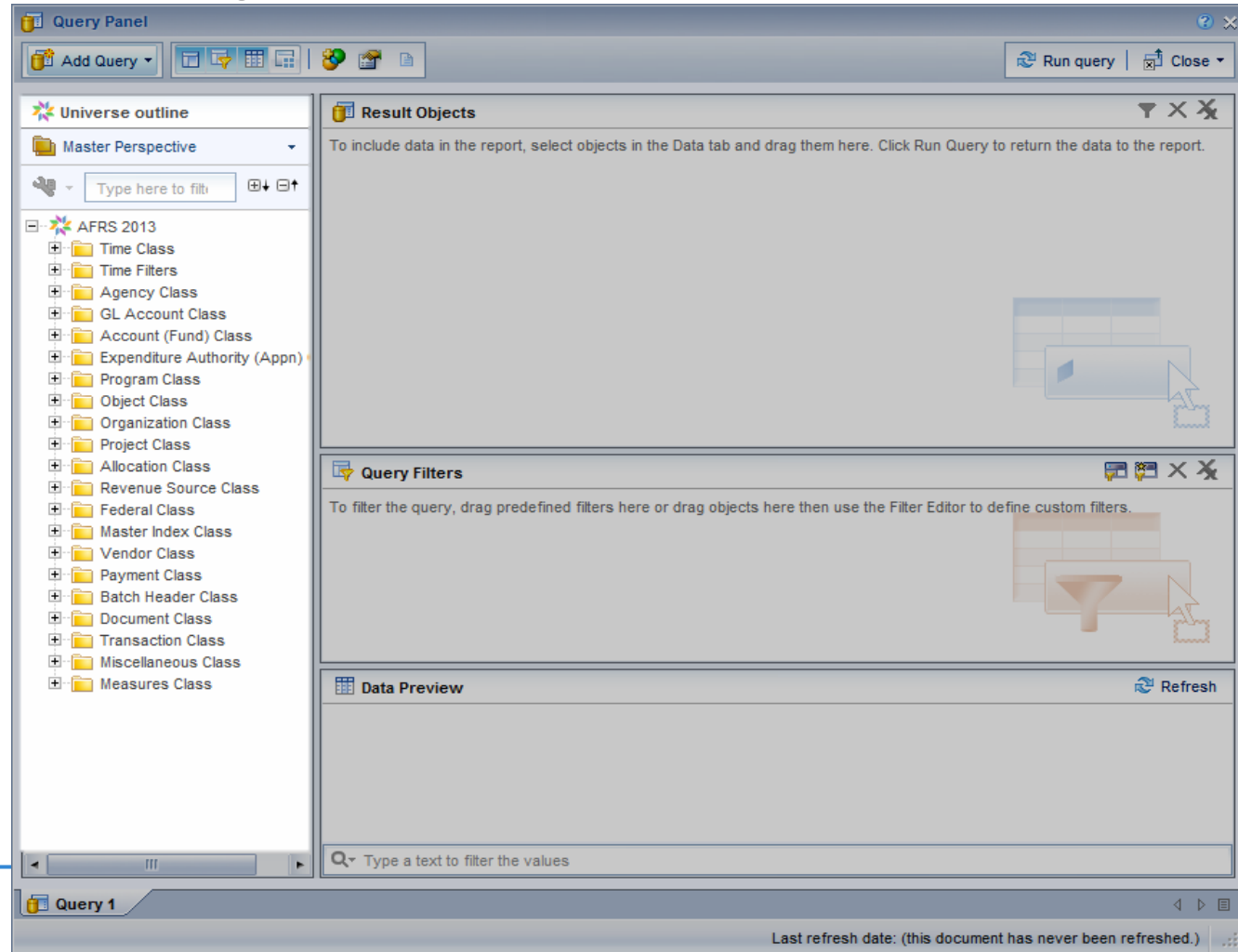
An object is a named component that maps to data or a derivation of data in the database.

## Types of objects

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

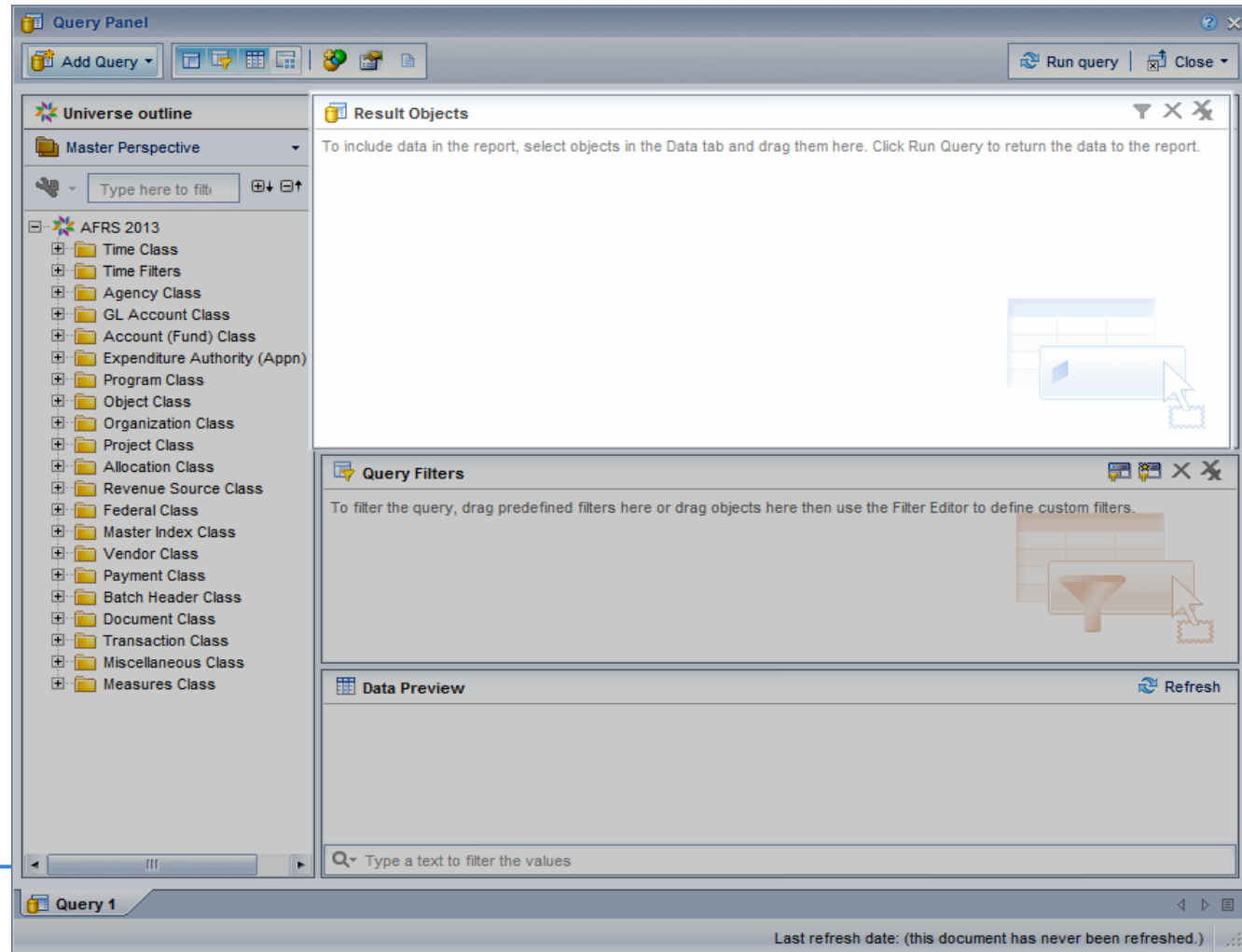
# Creating New Web Intelligence Document

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



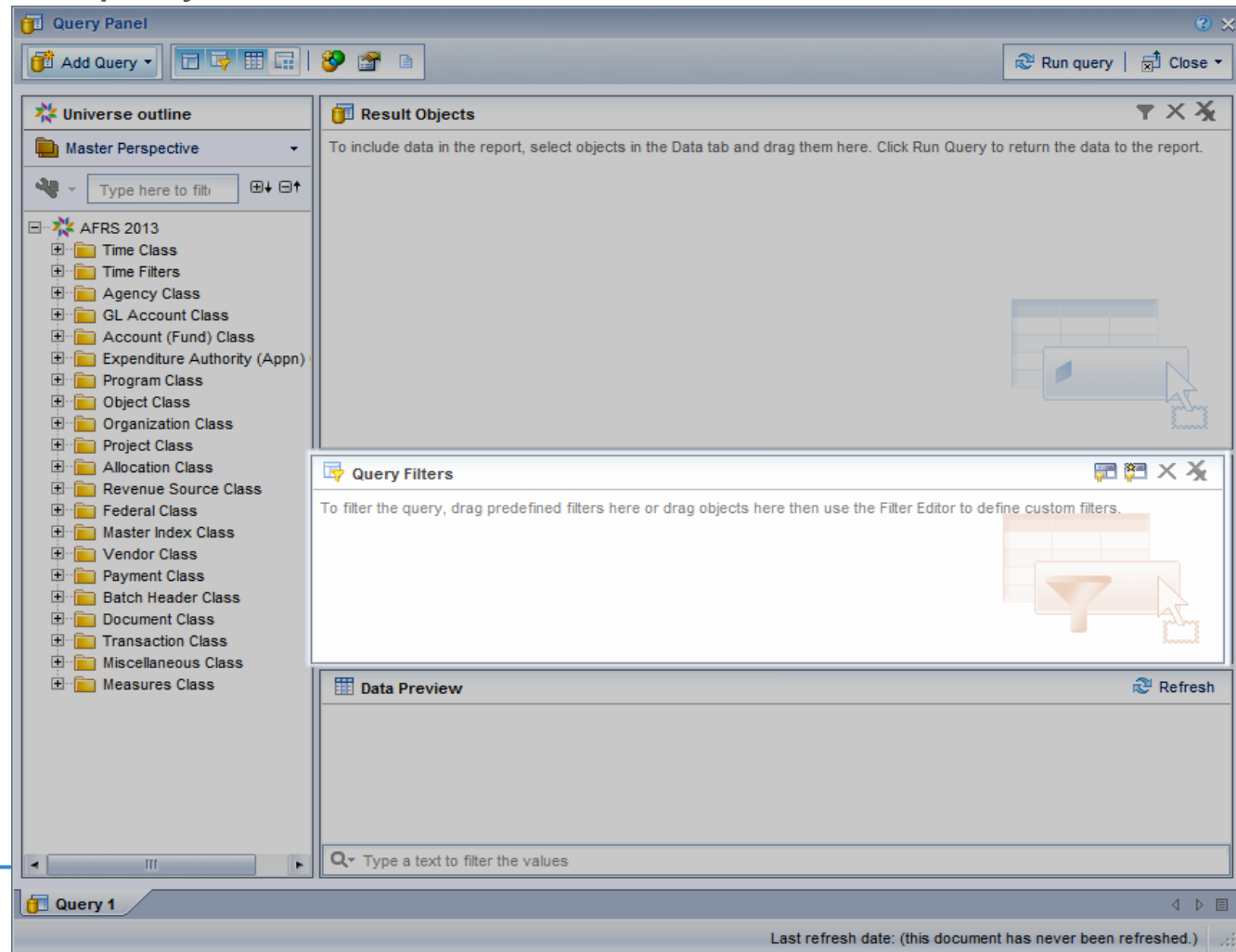
# Creating New Web Intelligence Document

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



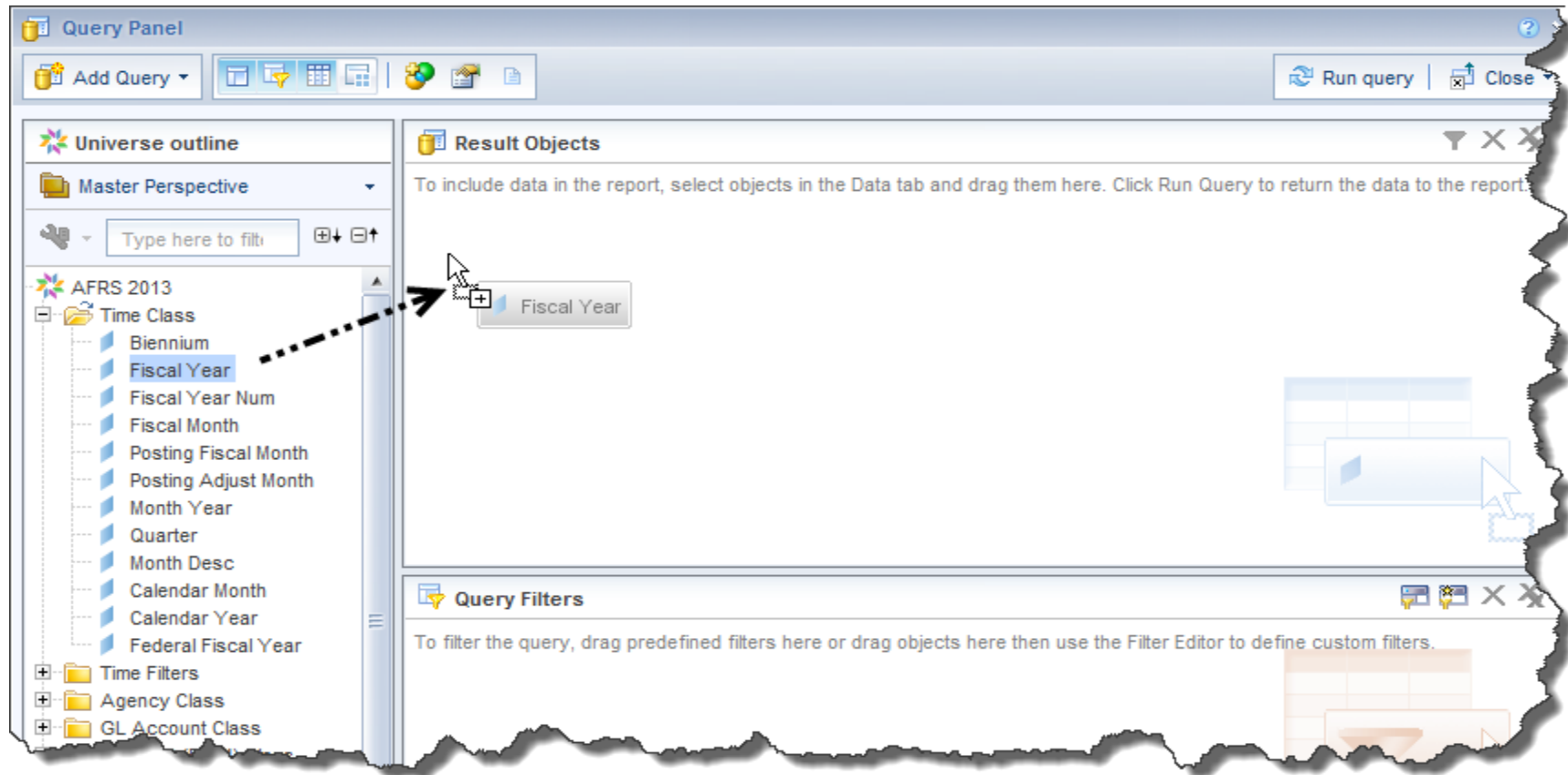
# Creating New Web Intelligence Document

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



# Creating New Web Intelligence Document

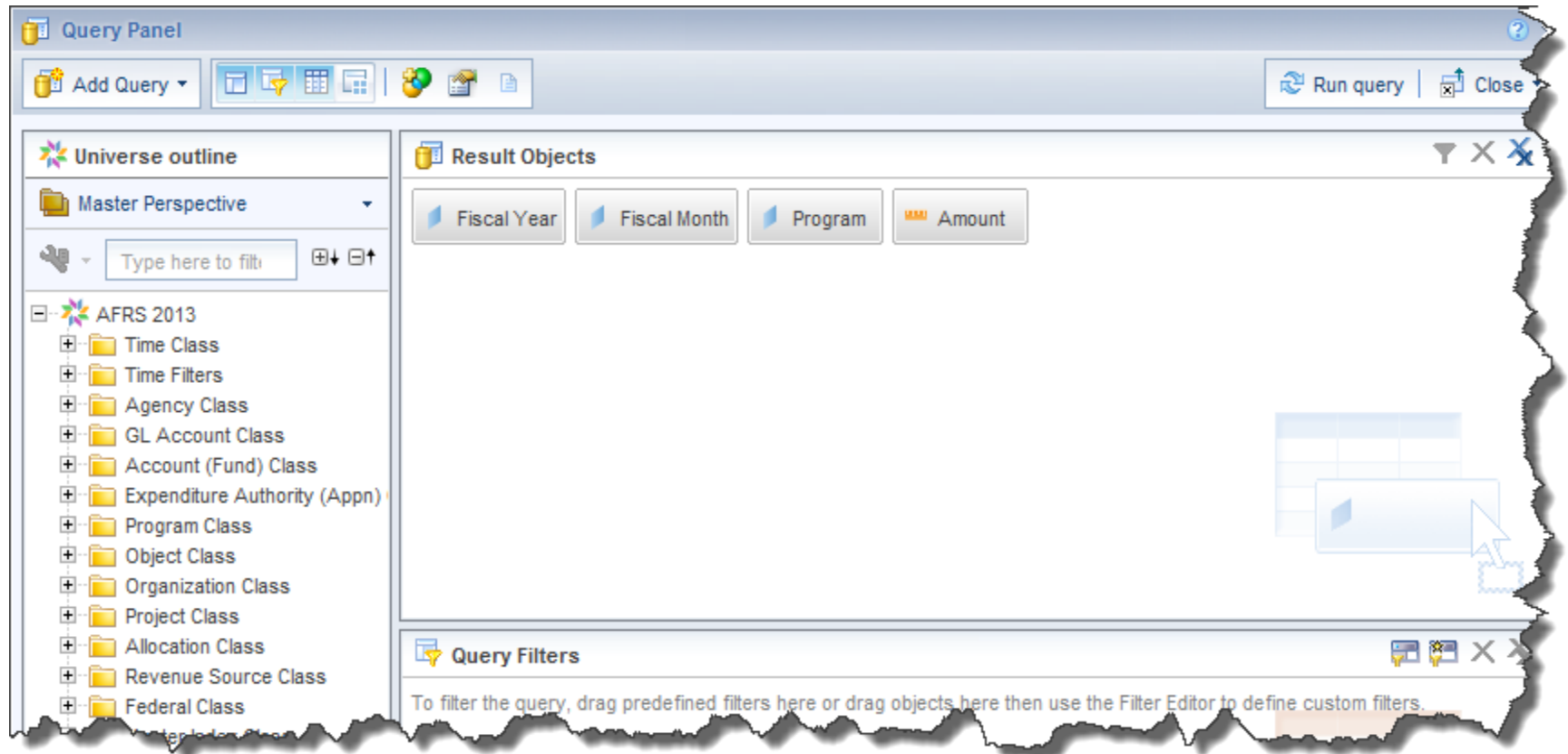
Select the objects you want to include in the query and drag them to the **Result Objects** pane. To add all the objects in the class, drag the class to the **Result Objects** pane.





# Creating New Web Intelligence Document

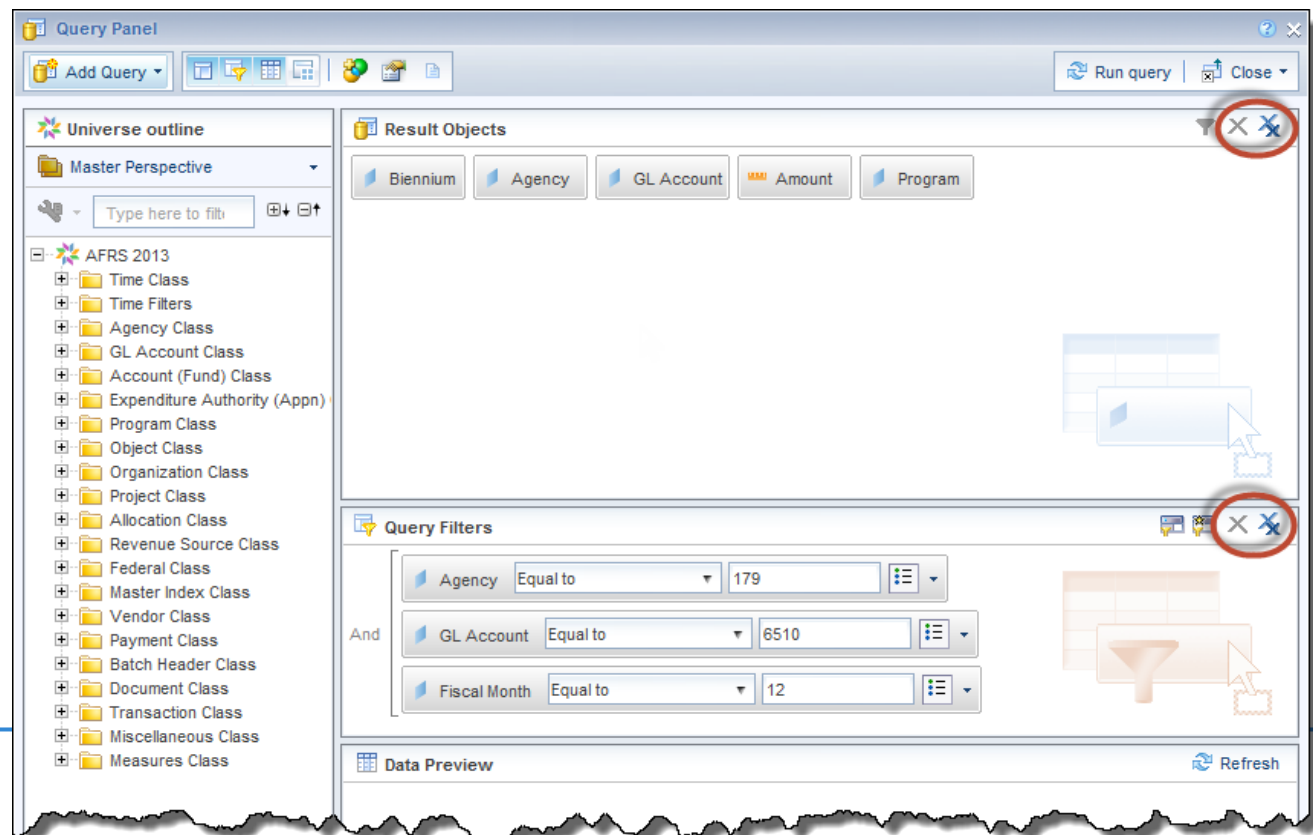
Repeat the previous step until the query contains all the objects you want to include.



# Creating New Web Intelligence Document

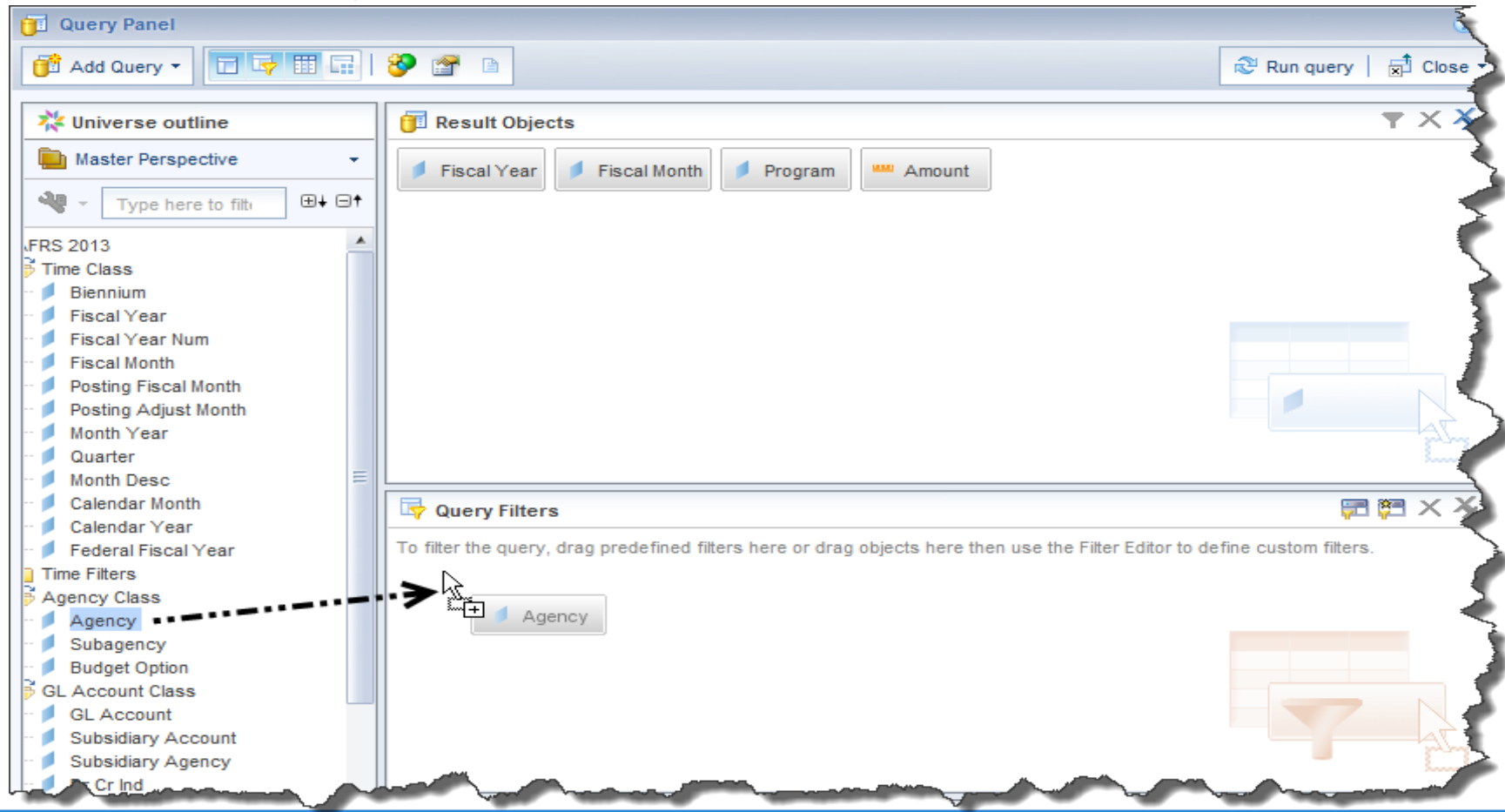
To remove an object from the **Result Objects** or **Query Filters** panes, click **Remove** at the top right corner of the pane.

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



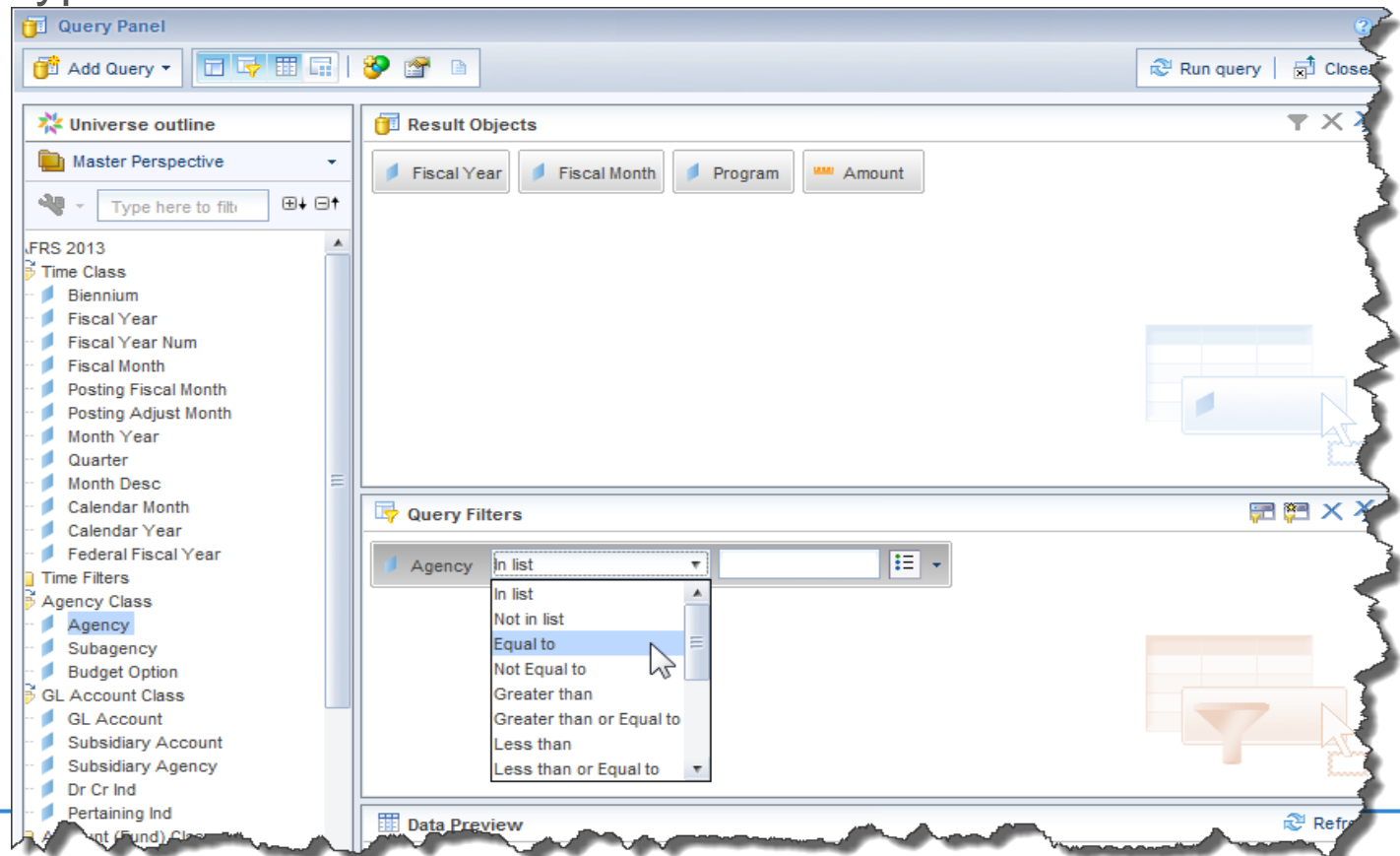
# Creating New Web Intelligence Document

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



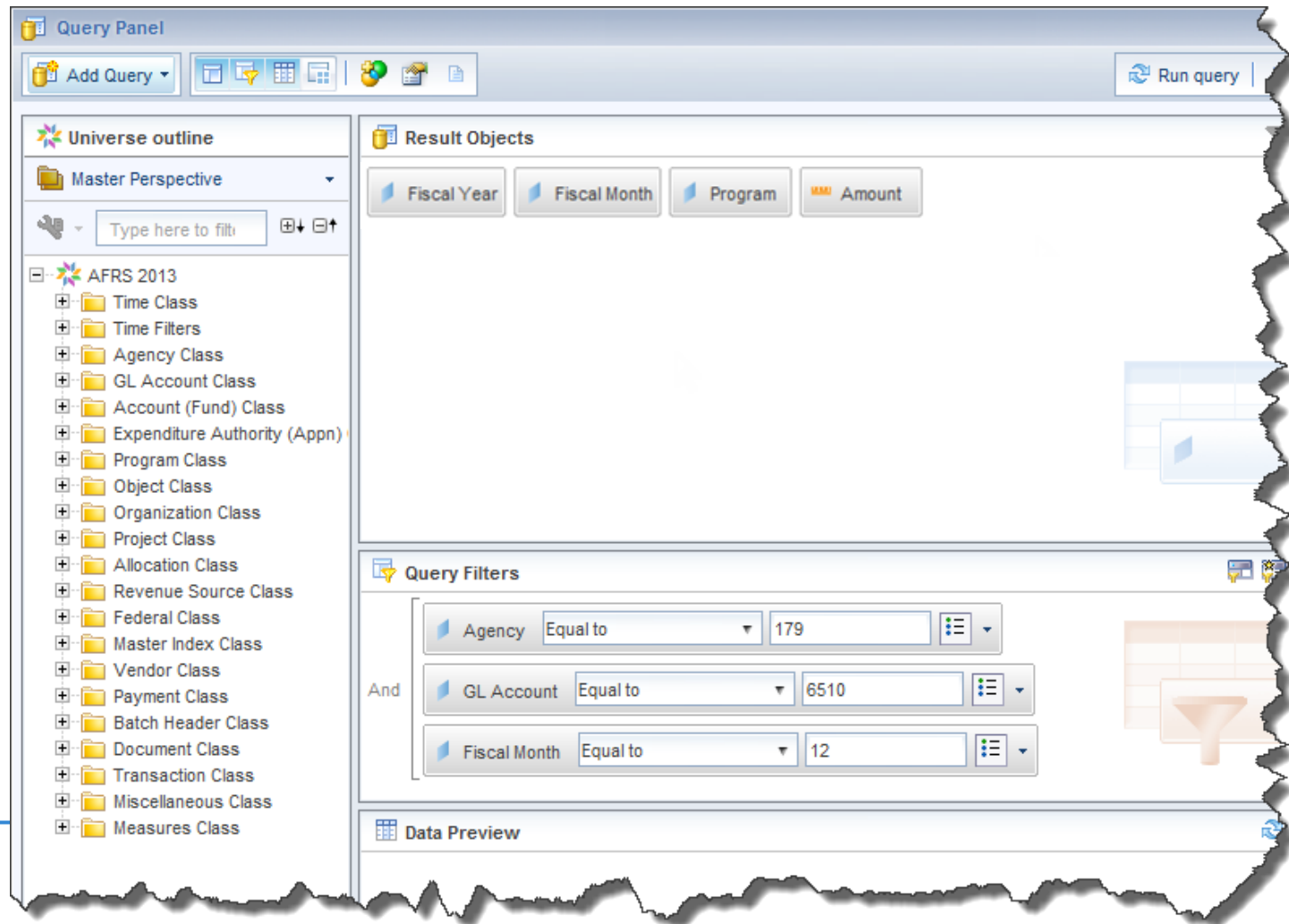
# Creating New Web Intelligence Document

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



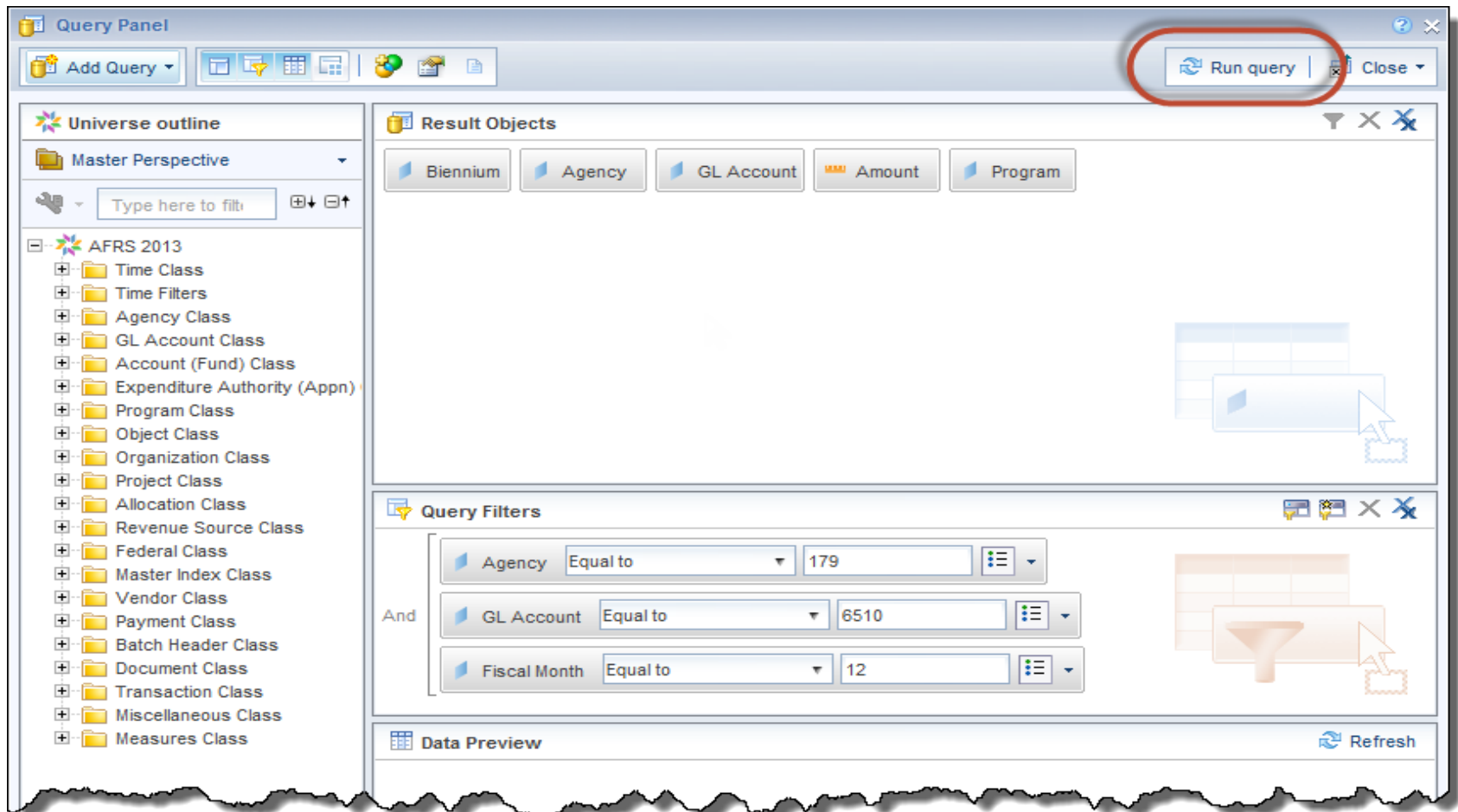
# Creating New Web Intelligence Document

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



# Creating New Web Intelligence Document

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



# Navigating the Report Panel

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

The screenshot displays the Report View window with a report titled "Report 1". The report contains a table with data. Callouts highlight various navigation and editing tools:

- Undo**: Located in the top-left toolbar.
- Refresh**: Located in the top toolbar, next to the Undo button.
- Display Data Elements**: A callout pointing to the data table.
- Page Navigation**: A callout pointing to the page navigation controls at the bottom.
- Zoom**: A callout pointing to the zoom controls at the bottom right.

The data table shows the following information:

Year	Program	Value
2013	010	292.39
2013	020	797.62
2013	030	716,030.27
2013	040	-514,631.35
2013	050	1,579,070.88
2013	060	-1,028,826.5
2013	070	33,118.87
2013	080	239,935.65

# Save a Web Intelligence Document

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

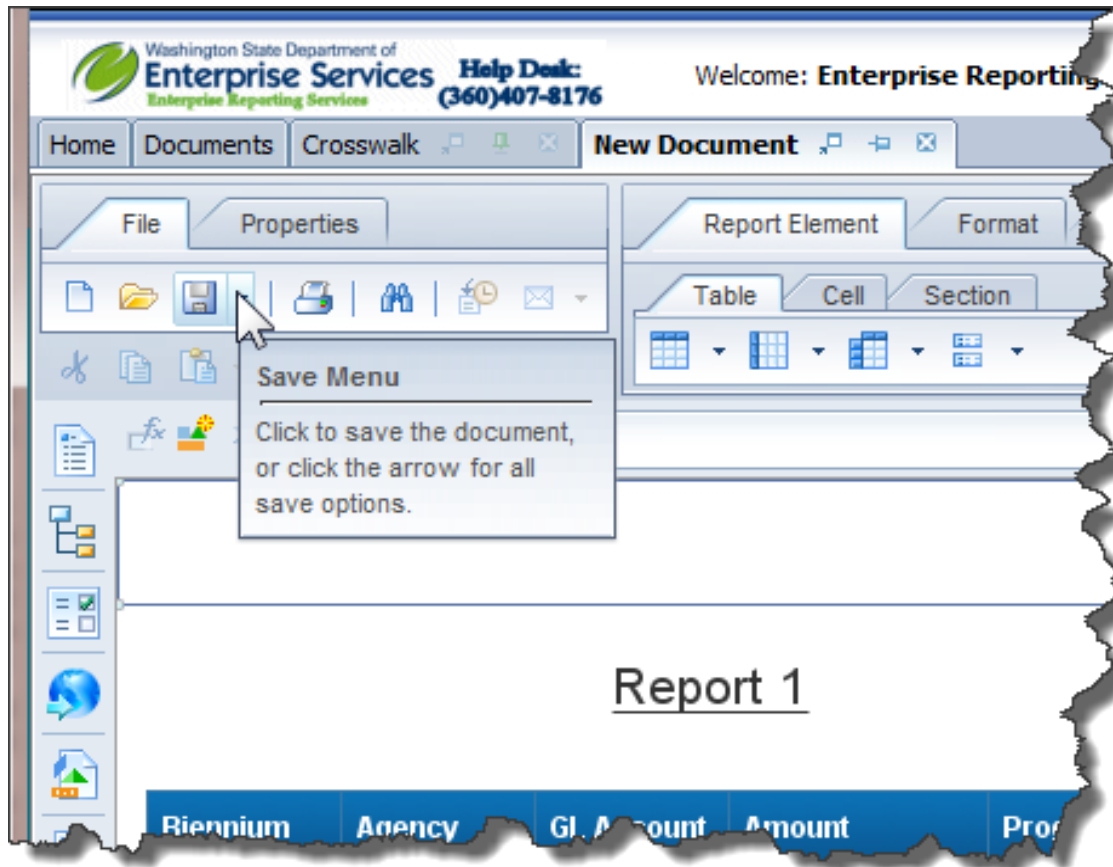
Depending on your security profile, you can save a document to either a personal or a public folder within the tool.

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



# Save a Web Intelligence Document

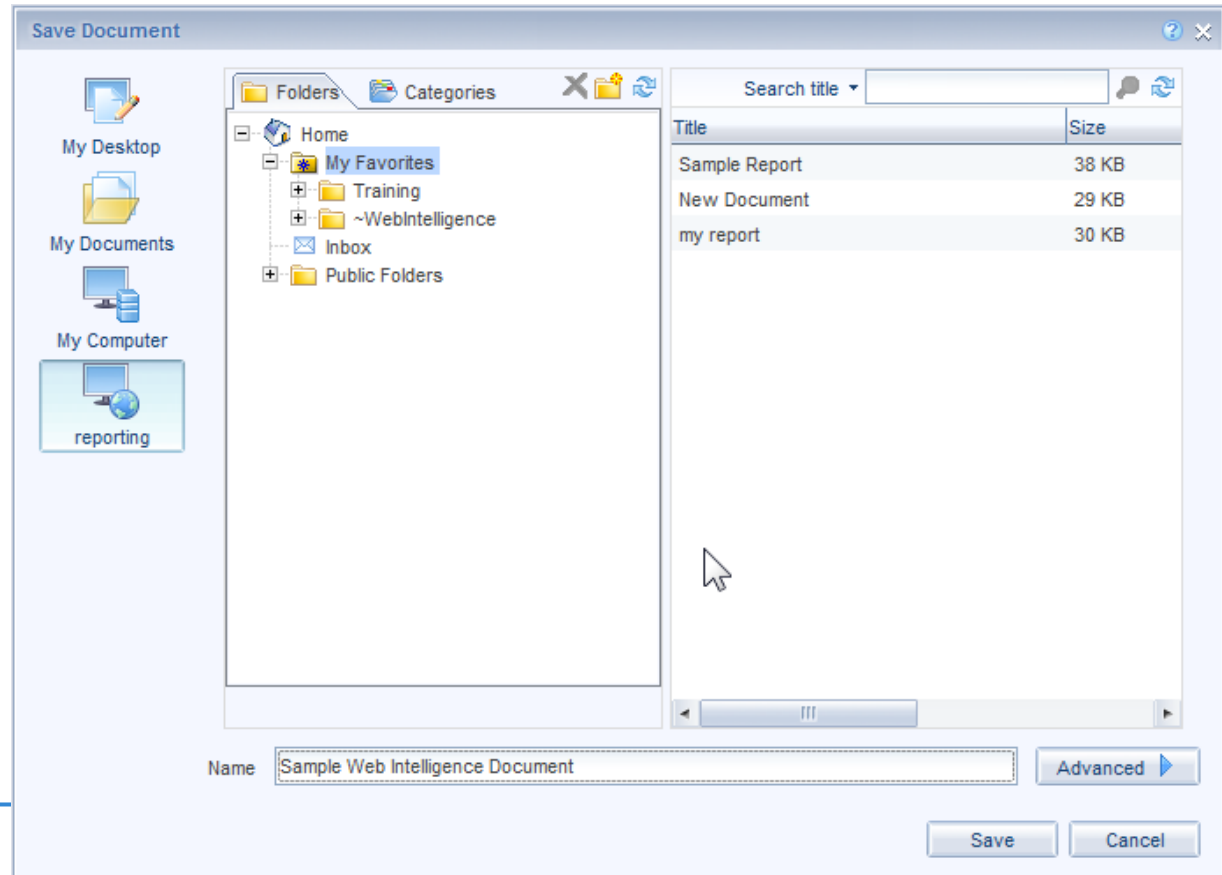
1. To save a Web Intelligence Document click the **Save** button on the upper left corner.



# Save a Web Intelligence Document

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

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



# Chapter 5

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## Query Filter Options

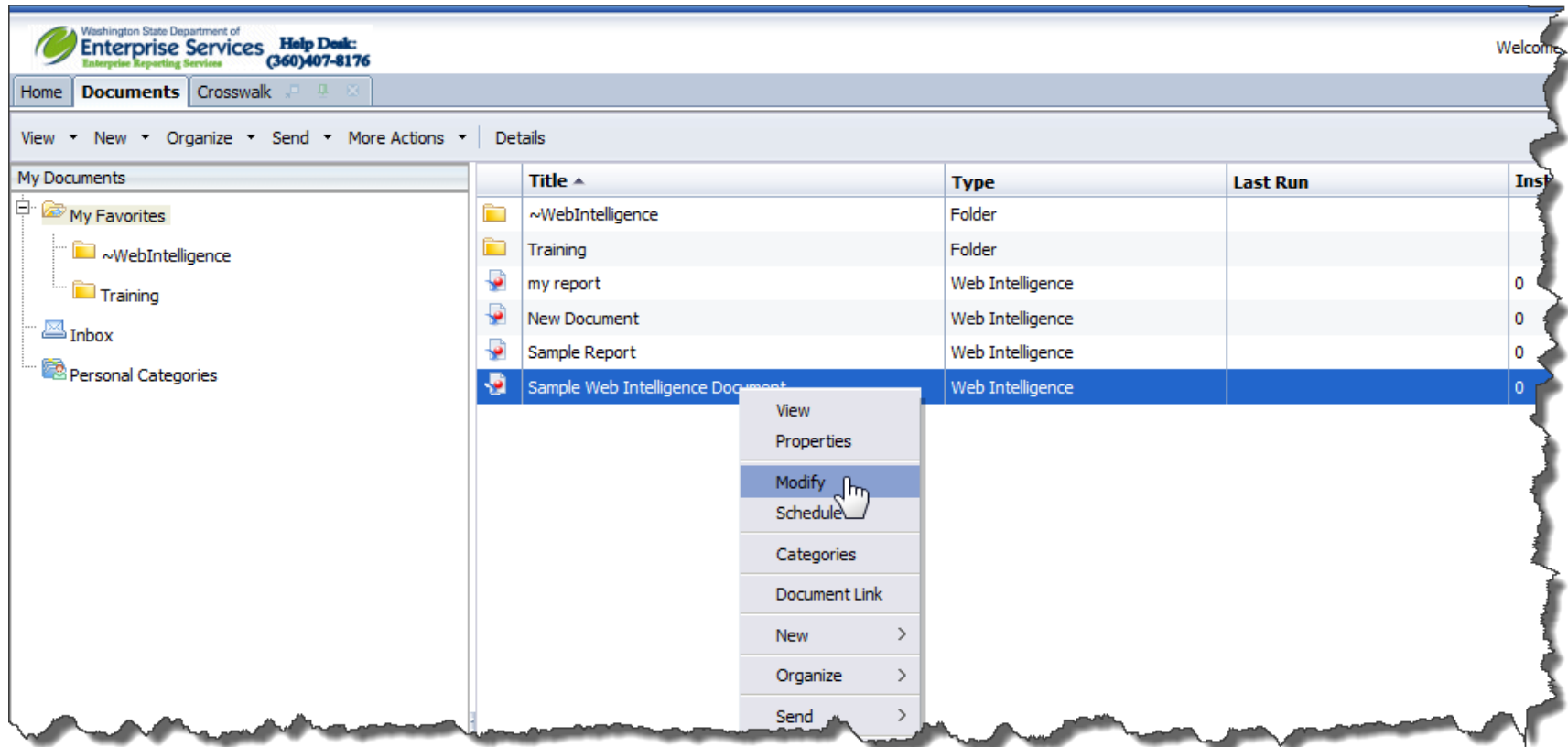


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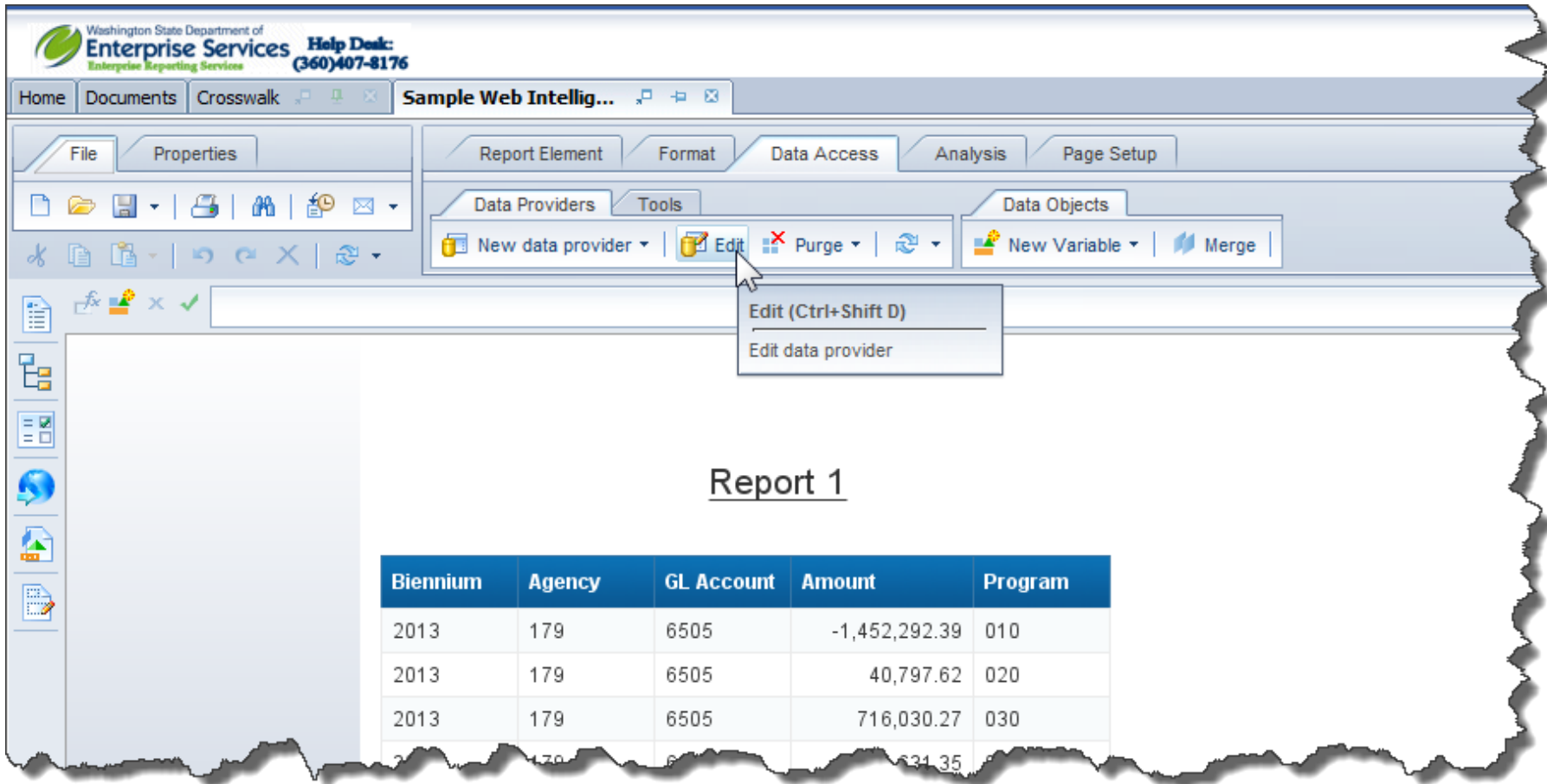
# Modify a Document

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



# Modify a Document

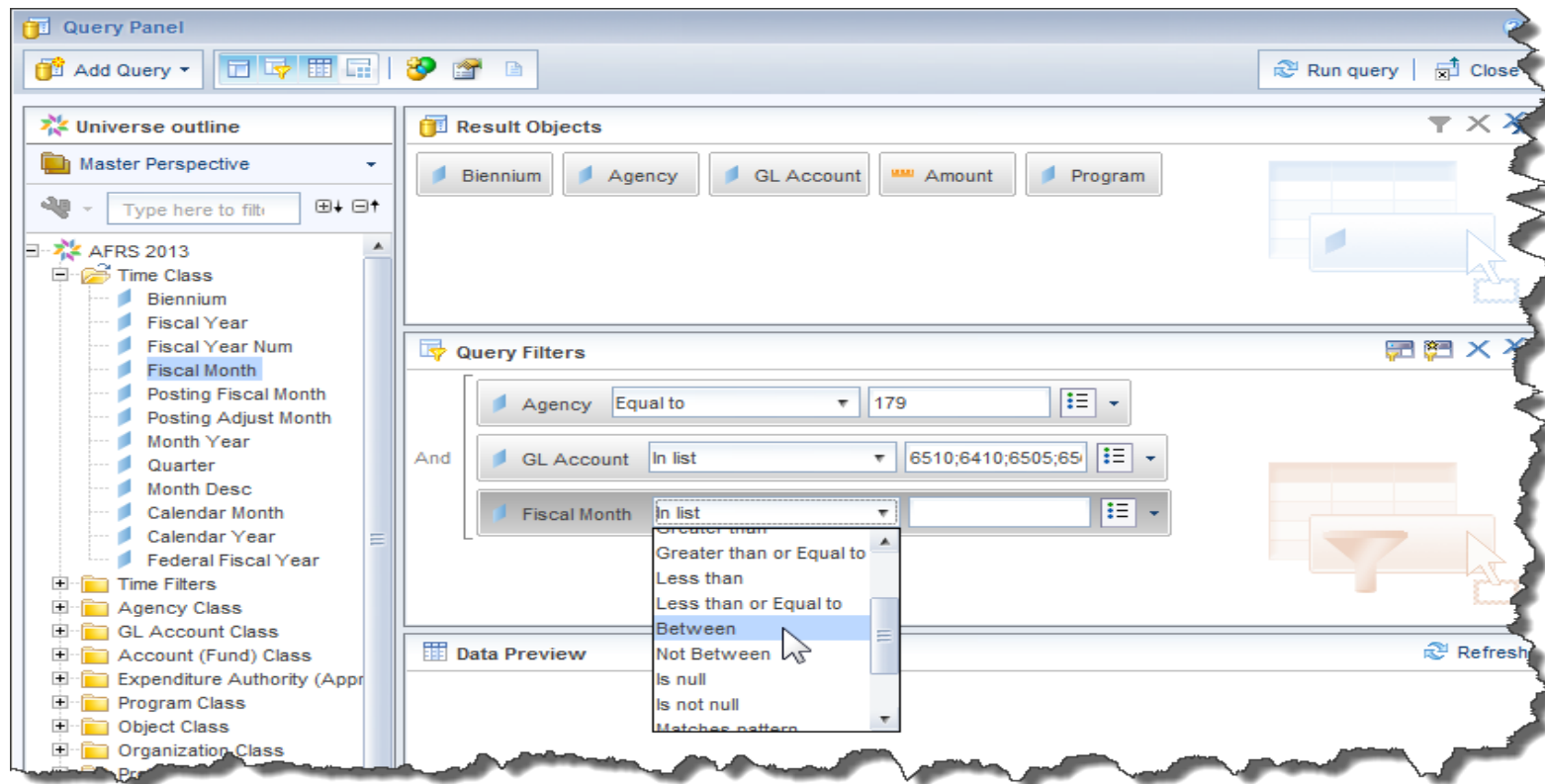
4. Select the **Data Access** tab and click the **Edit** icon located on the **Data Providers** sub tab.



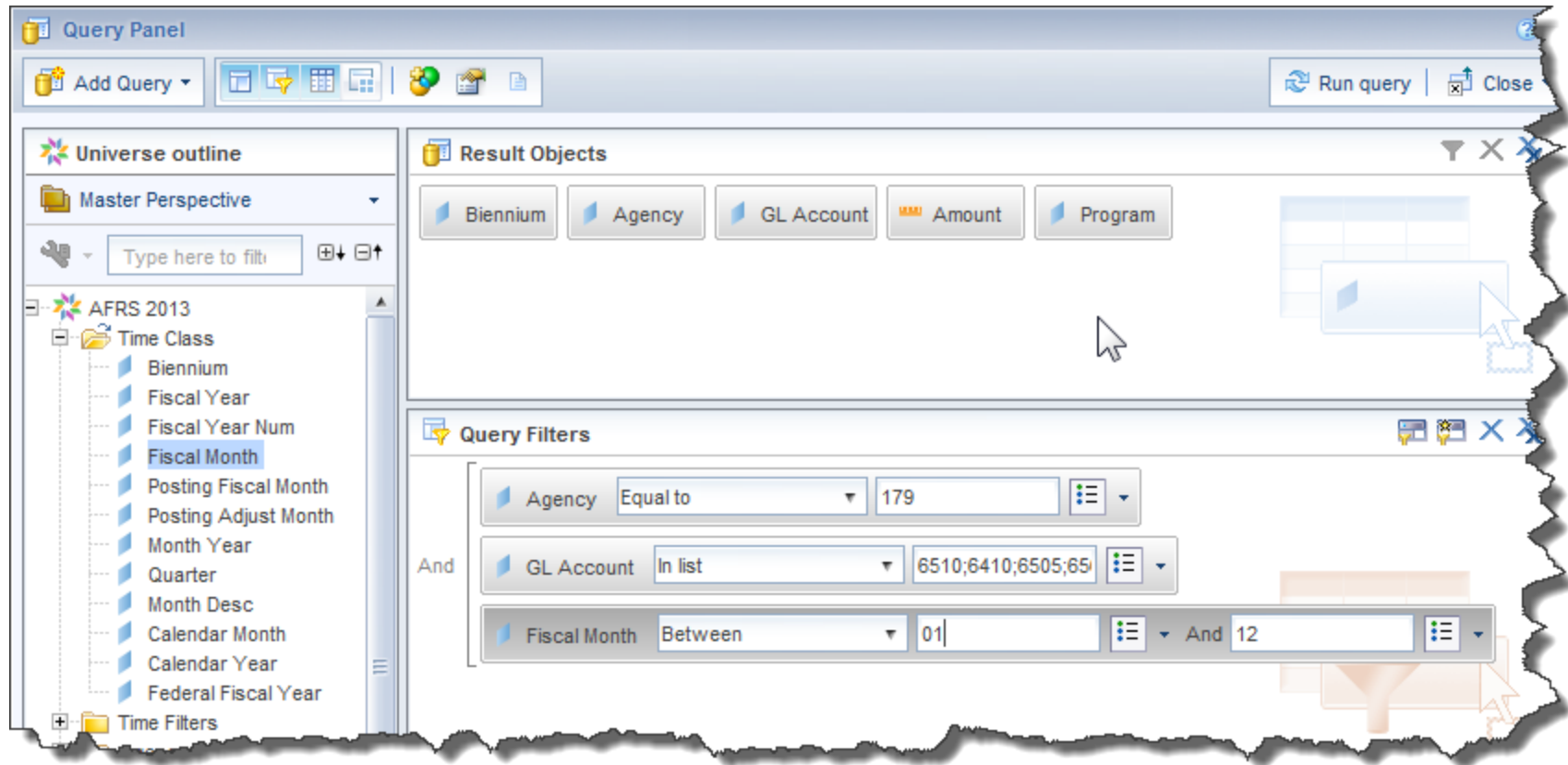
The screenshot shows the Washington State Department of Enterprise Services software interface. The top navigation bar includes 'Home', 'Documents', 'Crosswalk', and 'Sample Web Intellig...'. The main menu has tabs for 'File', 'Properties', 'Report Element', 'Format', 'Data Access', 'Analysis', and 'Page Setup'. The 'Data Access' tab is selected, and the 'Data Providers' sub-tab is active. The 'Edit' icon (a document with a pencil) is highlighted, and a tooltip shows the action 'Edit (Ctrl+Shift D)' and 'Edit data provider'. The 'Data Objects' sub-tab shows 'New Variable' and 'Merge' options. The main content area displays 'Report 1' and a table with financial data.

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

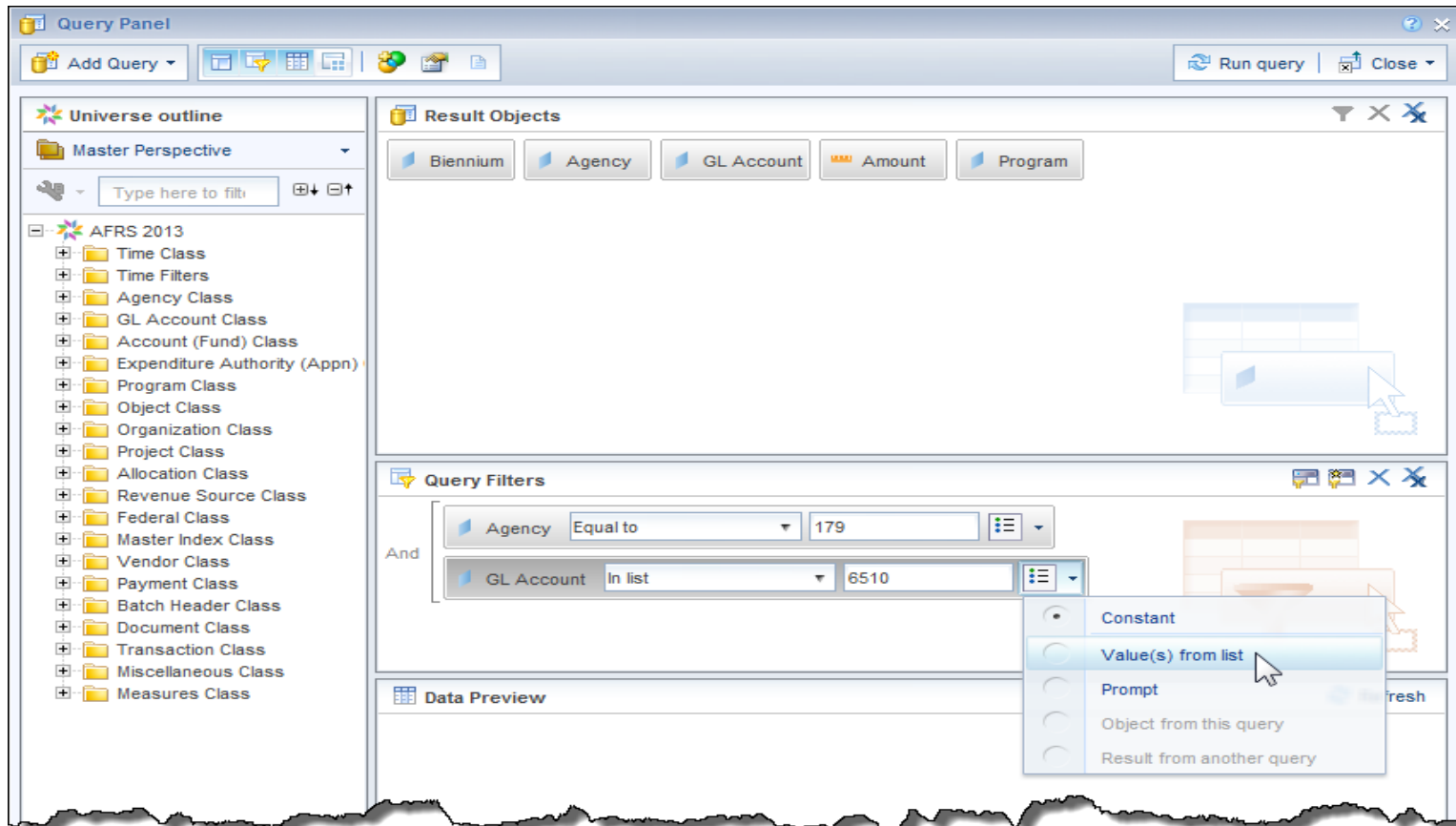
To set a filter using a range of values use the **Between** operator. Since you have placed **Fiscal Month** in the Result Objects you can drag it down to the Query Filter Box. Change the operator to **Between** from the drop down list of operators.



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

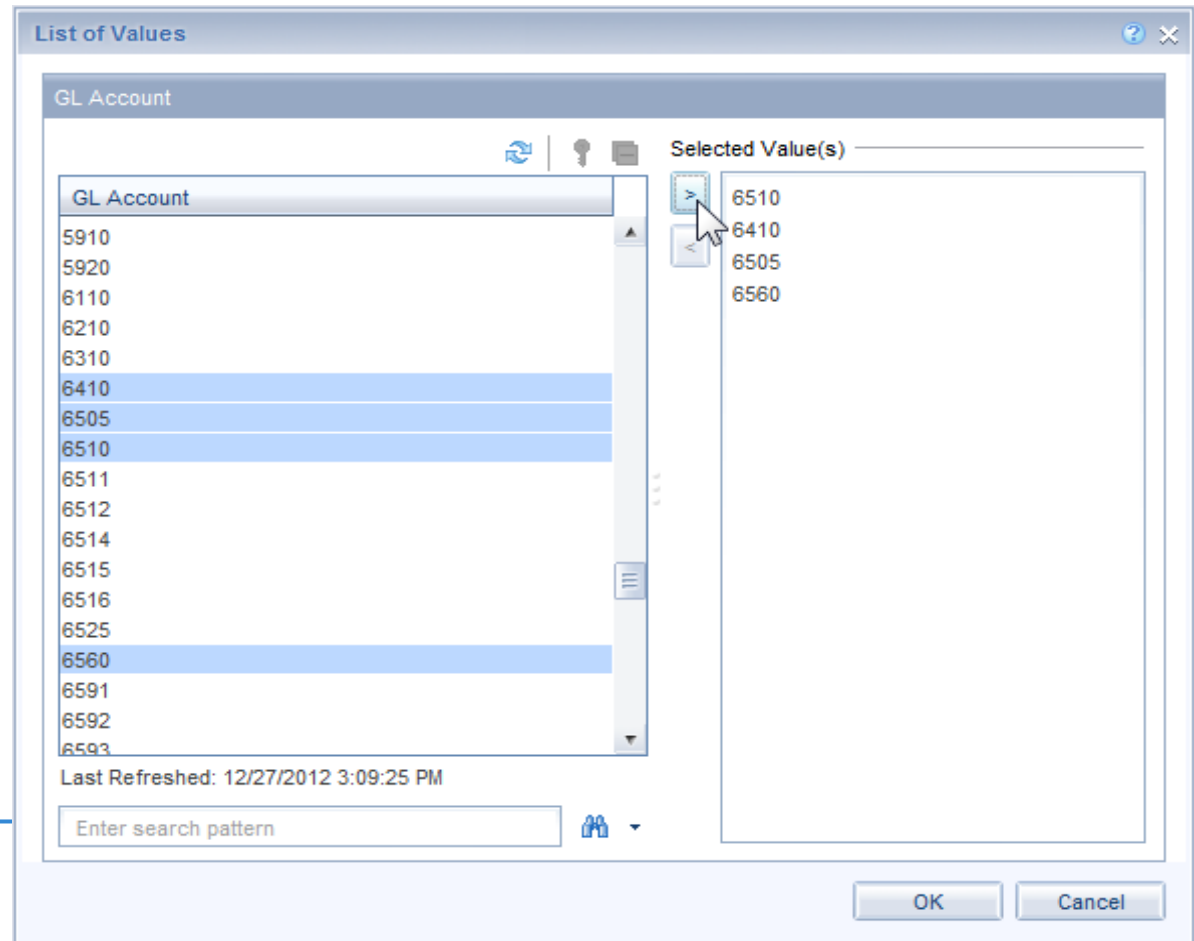


To set a filter using a list of values use the default operator **In list**. Click on the arrow on the end of the filter editor box. Select **Values from List**.





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



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

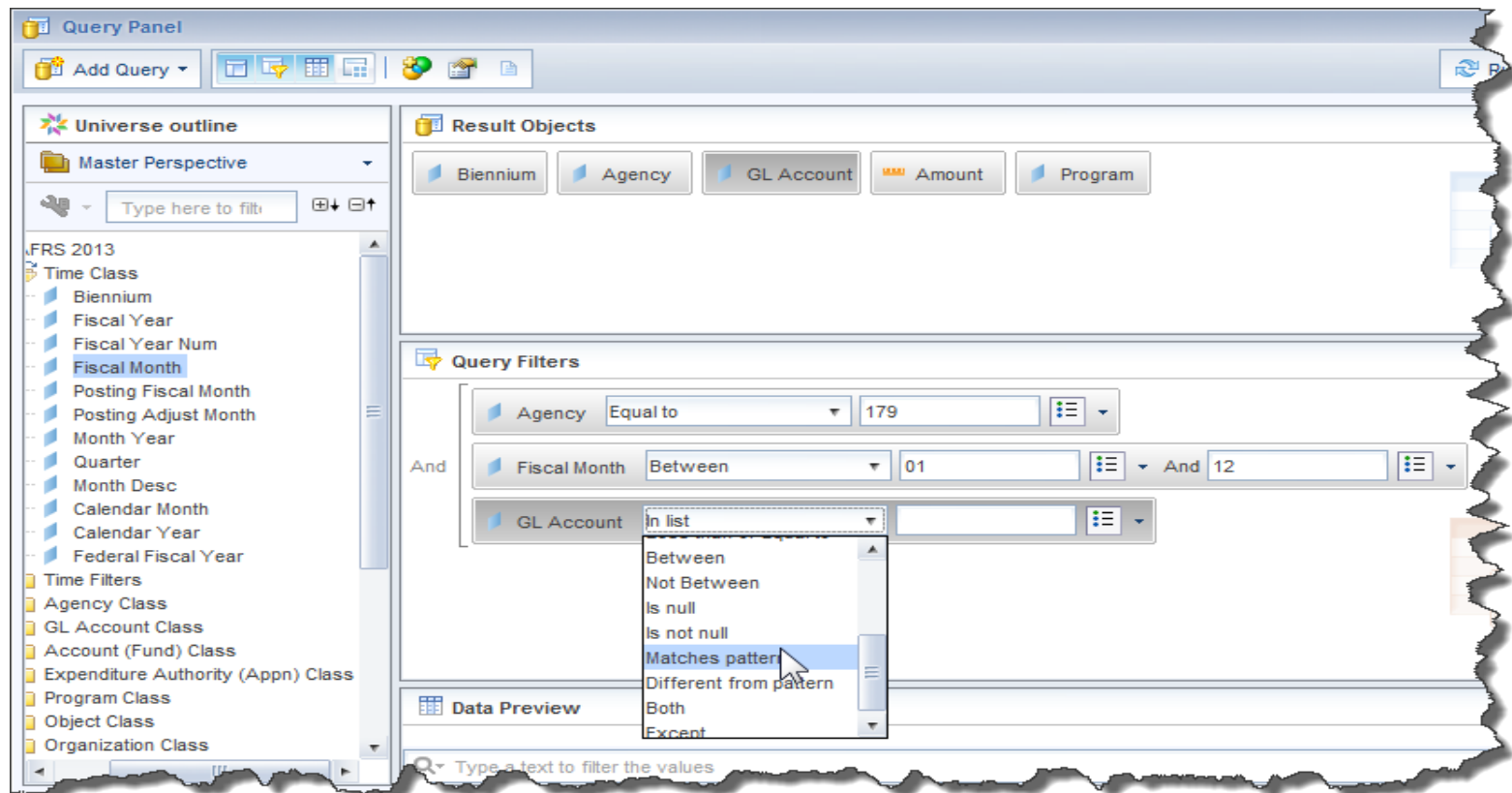
The screenshot displays the 'Query Panel' window with the following components:

- Universe outline:** A tree view showing the 'Master Perspective' and a list of classes under 'AFRS 2013', including Time Class, Time Filters, Agency Class, GL Account Class, Account (Fund) Class, Expenditure Authority (Appn), Program Class, Object Class, Organization Class, Project Class, Allocation Class, Revenue Source Class, Federal Class, Master Index Class, Vendor Class, Payment Class, Batch Header Class, Document Class, Transaction Class, Miscellaneous Class, and Measures Class.
- Result Objects:** A section containing buttons for 'Biennium', 'Agency', 'GL Account', 'Amount', and 'Program'.
- Query Filters:** A section with two filters:
  - Agency:** Set to 'Equal to' with the value '179'.
  - GL Account:** Set to 'In list' with the value '6510;6410;6505;6560'.
- Data Preview:** A section with a 'Refresh' button and a search bar labeled 'Type a text to filter the values'.

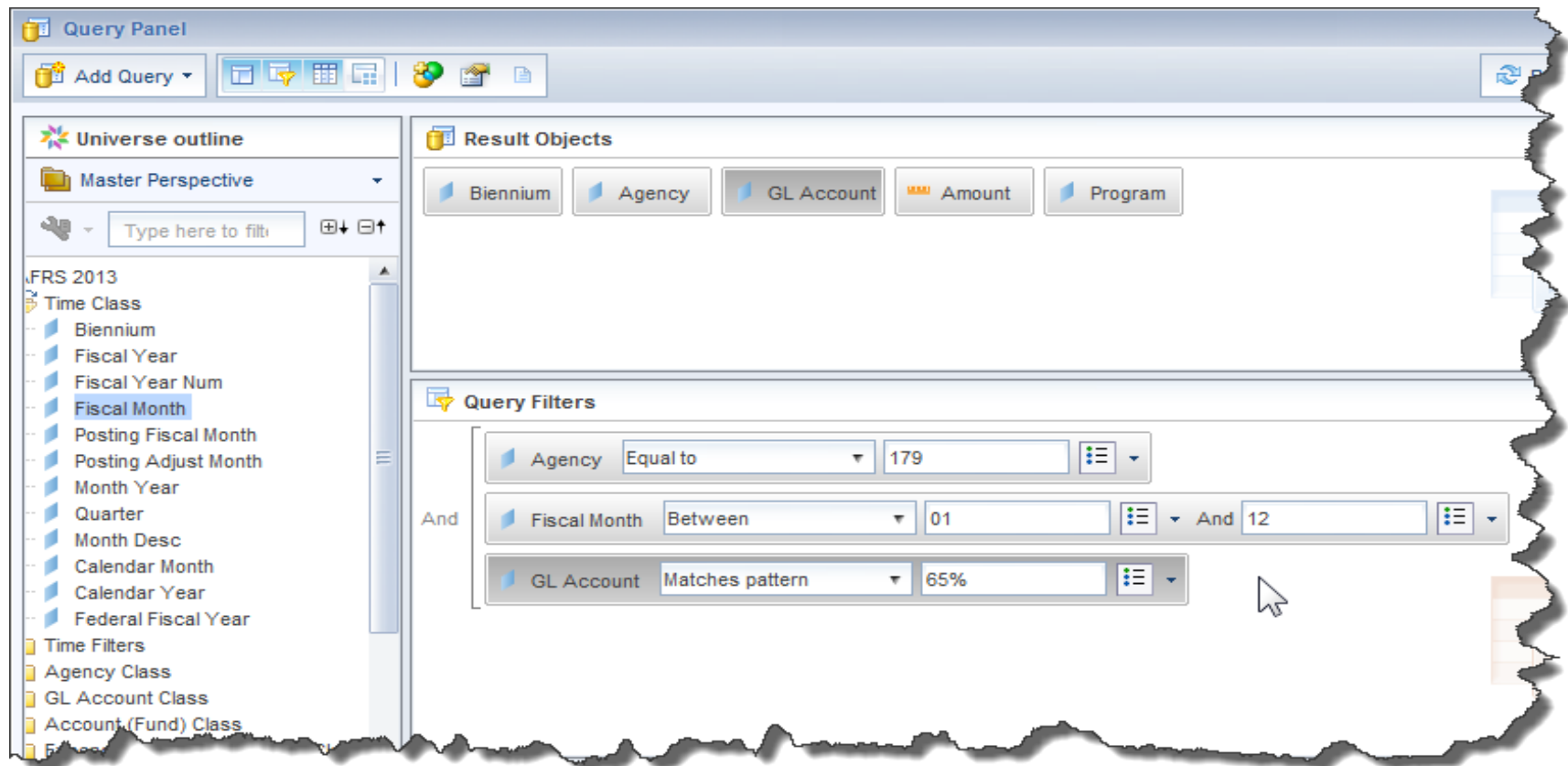
The status bar at the bottom indicates 'Query 1' and 'Last refresh date: December 27, 2012 2:54:20 PM GMT-08:00'.

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

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



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



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

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

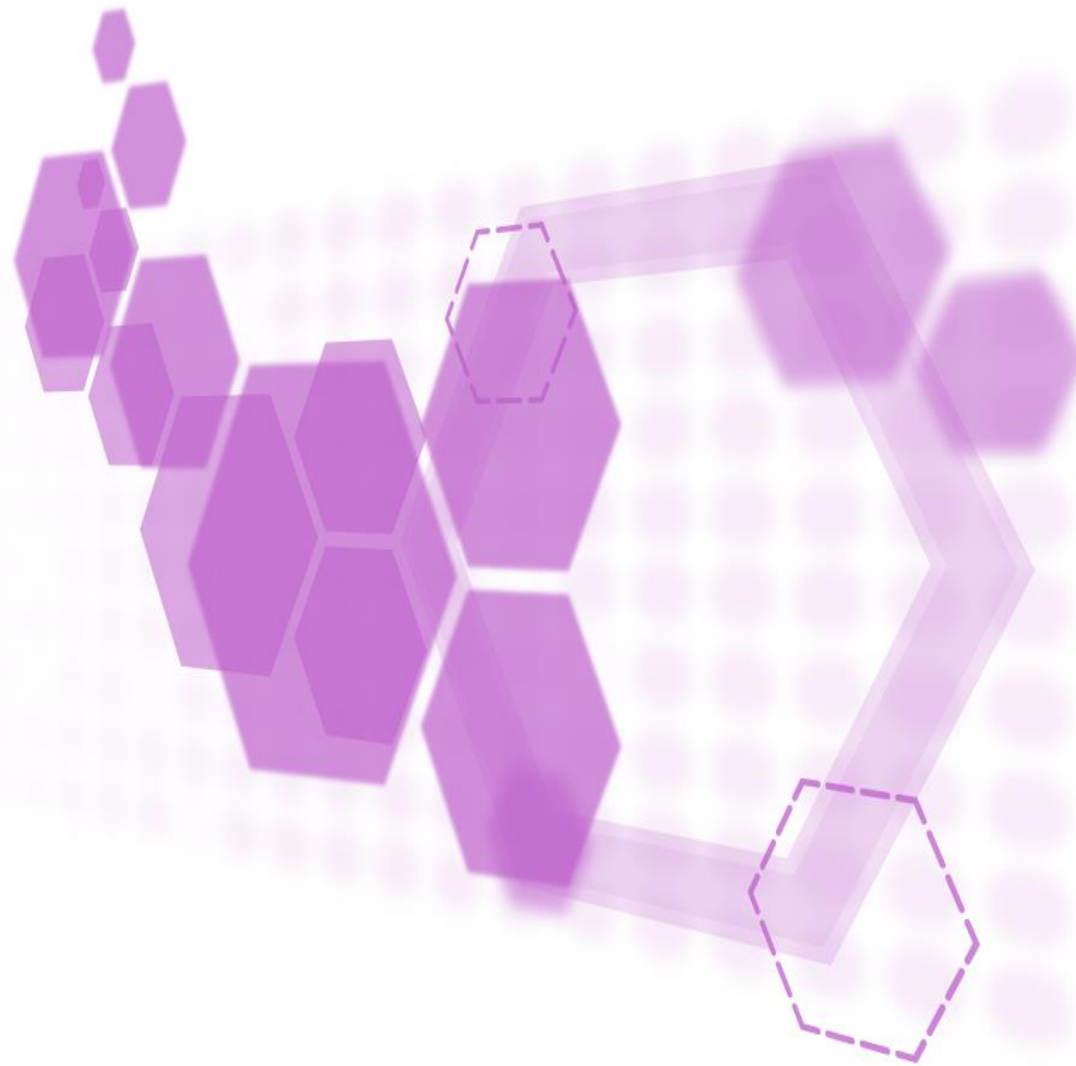
# Chapter 6

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## Working with Web Intelligence Reports



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

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

Welcome: Enterprise Reporting | Applications | Preferences | Help Menu | Log Off

Home | Documents | Crosswalk | Sample Web Intellig...

File | Properties | Report Element | Format | Data Access | Analysis | Page Setup | Reading | Design | Data

Report | Rename | Move | Page | Header | Footer | Scale To Page | Margins | Display

Add Report | Duplicate | Portrait | A4 | Width: Automatic | Height: Automatic | Sca

Available Objects

Type here to filter tree

- Sample Web Intelligence Document
  - Agency
  - Biennium
  - GL Account
  - Program
  - Amount
  - Variables

Arranged by: Alphabetic order

### Report 1

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

Report 1

Track Changes: Off | Page 1 of 1 | 100% | 15 minutes ago.

To Remove a column –

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

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

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

The interface also includes a top navigation bar with 'Home', 'Documents', and 'Crosswalk' tabs, and a bottom status bar showing 'Track Changes: Off', 'Page 1 of 1', and '4 minutes ago'.

# Remove Columns

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

The screenshot shows the Enterprise Reporting software interface. On the left is a tree view of 'Available Objects' including Agency, Biennium, GL Account, Program, Amount, and Variables. The main area displays 'Report 1' with a table. A 'Remove' dialog box is open, showing options to 'Remove Row' or 'Remove Column'. The 'Remove Column' option is selected. The table data is as follows:

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

The dialog box has 'Remove Column' selected and 'OK' and 'Cancel' buttons. The status bar at the bottom shows 'Track Changes: Off', 'Page 1 of 1', '100%', and '7 minutes ago'.

# Add / Remove Columns

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

Washington State Department of Enterprise Reporting Services  
Help Desk: (360)407-8176  
Welcome: Enterprise Reporting | Applications | Preferences | Help Menu | Log Off

Home Documents Crosswalk Sample Web Intellig...

File Properties Report Element Format Data Access Analysis Page Setup Reading Design Data

Report Rename Move Page Header Footer Scale To Page Margins Display

Add Report Duplicate Portrait A4 Width: Automatic Height: Automatic

Available Objects

Type here to filter tree

- Sample Web Intelligence Document
  - Agency
  - Biennium
  - GL Account
  - Program
  - Amount
  - Variables

Arranged by: Alphabetic order

### Report 1

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

Report 1

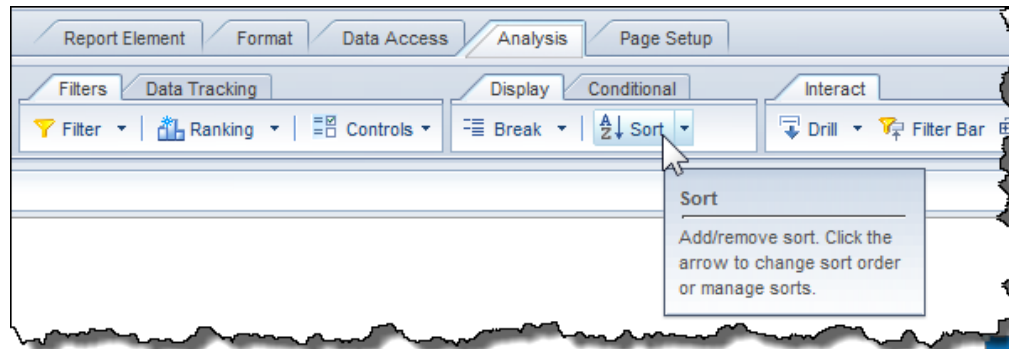
Track Changes: Off Page 1 of 1 100% 33 minutes ago.

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

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

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

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



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

A break divides a large table into smaller sub-tables based on the selected value. Using a break, you can display subtotals by the specified value, as well as a grand total for all values.

To add a break, click in the data to highlight the column. Click on the **Break** button on Display sub tab to add and remove a break.

The screenshot shows the Enterprise Reporting software interface. The 'Analysis' menu is open, and the 'Display' sub-tab is selected. The 'Break' button is highlighted with a red box. A tooltip for the 'Break' button is visible, stating: 'Break: Add a break to group results on a table.'

The main window displays a table with the following data:

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

# Simple Calculations – Sum

1. Highlight the data in the **Amount** column
2. Select the **Analysis** tab and click the **Sum** icon located on the **Functions** sub tab.
3. Each break will display a sum and you can navigate to the end of the report to see your overall total.

The screenshot shows the 'Sample Web Intelligence' application interface. The 'Analysis' tab is selected, and the 'Functions' sub-tab is active. The 'Sum' icon (represented by the Greek letter Sigma) is highlighted, and a tooltip is displayed with the text: 'Sum (Ctrl \*)', 'Create/remove a Sum calculation'. The main report area, titled 'Report 1', contains a table with the following data:

Biennium	Agency	GL Account	Amount	Program
2013	179	6505	-1,452,292.39	010
2013	179	6505	40,797.62	020
2013	179	6505	716,030.27	030
2013	179	6505	-514,631.35	040
2013	179	6505	179,030.88	050



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

The screenshot shows the Enterprise Reporting software interface. The top navigation bar includes 'Home', 'Documents', and 'Crosswalk'. The main menu has 'File', 'Properties', 'Report Element', 'Format', 'Data Access', 'Analysis', 'Page Setup', 'Reading', 'Design', and 'Data'. The 'Format' tab is active, and the 'Numbers' sub-tab is selected. A dropdown menu is open, showing various number formats. The 'Amount' column in the data table is highlighted, and the formula bar shows '= [Amount]'.

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

Format dropdown menu options:

- DEFAULT
- 1,234.57; -1,234.57
- 1.234567E3; -1.234567E3
- 1235; -1235
- 1235; (1235)
- 1234.57; -1234.57
- 1,235; -1,235
- \$1,234.57; (\$1,234.57)
- (\$#,##0.00)

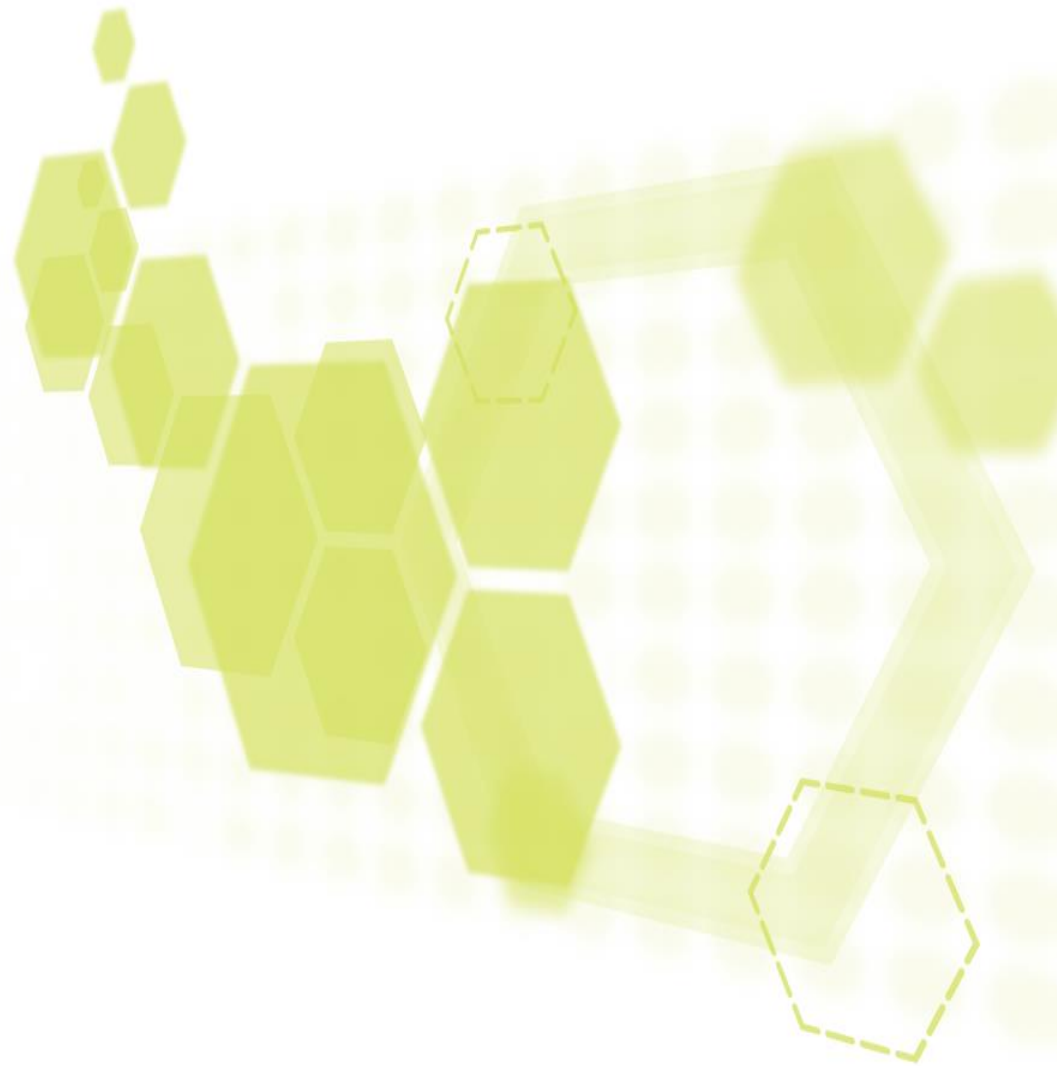
# Chapter 7

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## Printing and Exporting Reports

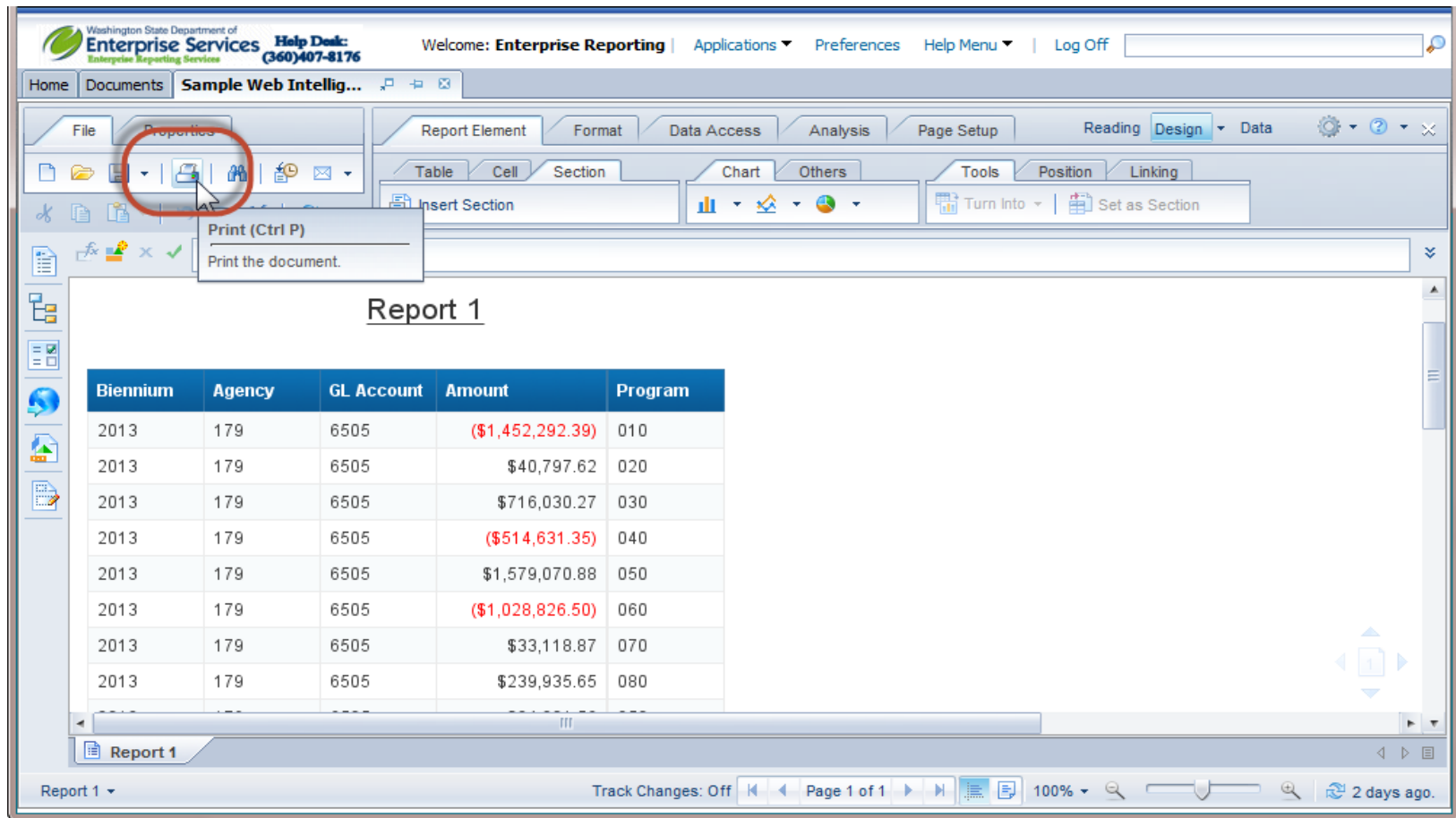


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# Printing Reports

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



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

Welcome: Enterprise Reporting | Applications | Preferences | Help Menu | Log Off

Home Documents Sample Web Intellig...

File Properties

Print (Ctrl P)  
Print the document.

Report Element Format Data Access Analysis Page Setup Reading Design Data

Table Cell Section Chart Others Tools Position Linking

Insert Section Turn Into Set as Section

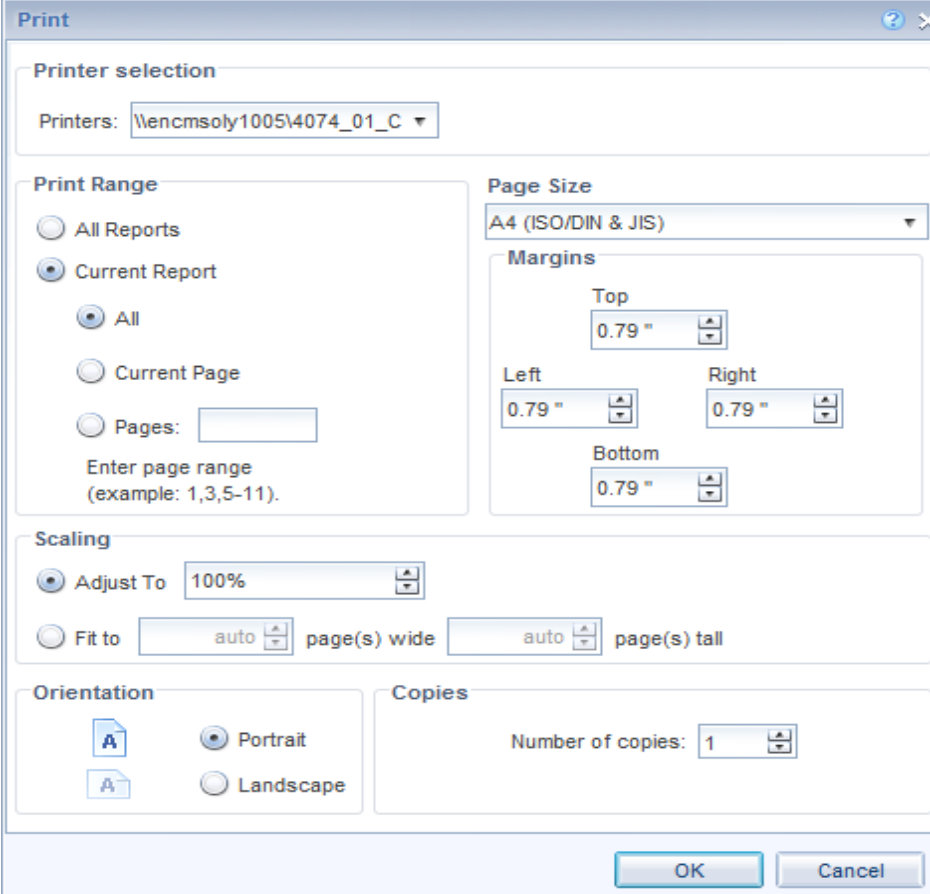
### Report 1

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

Report 1

Track Changes: Off Page 1 of 1 100% 2 days ago.

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



The image shows a standard Windows-style 'Print' dialog box. It is titled 'Print' and has a close button in the top right corner. The dialog is organized into several sections: 'Printer selection' with a dropdown menu showing '\\encmsoly1005\4074\_01\_C'; 'Print Range' with radio buttons for 'All Reports', 'Current Report' (selected), and 'Pages:'; 'Page Size' with a dropdown menu showing 'A4 (ISO/DIN & JIS)'; 'Margins' with input fields for Top, Left, Right, and Bottom, all set to '0.79"'; 'Scaling' with radio buttons for 'Adjust To' (set to '100%') and 'Fit to'; 'Orientation' with icons and radio buttons for 'Portrait' (selected) and 'Landscape'; and 'Copies' with a 'Number of copies' field set to '1'. At the bottom right are 'OK' and 'Cancel' buttons.

**Print**

**Printer selection**

Printers: \\encmsoly1005\4074\_01\_C ▼

**Print Range**

☐ All Reports

☒ Current Report

☐ All

☐ Current Page

☐ Pages:

Enter page range  
(example: 1,3,5-11).

**Page Size**

A4 (ISO/DIN & JIS) ▼

**Margins**

Top: 0.79 " ▼

Left: 0.79 " ▼ Right: 0.79 " ▼

Bottom: 0.79 " ▼

**Scaling**

☒ Adjust To: 100% ▼

☐ Fit to: auto ▼ page(s) wide auto ▼ page(s) tall

**Orientation**

☒ Portrait

☐ Landscape

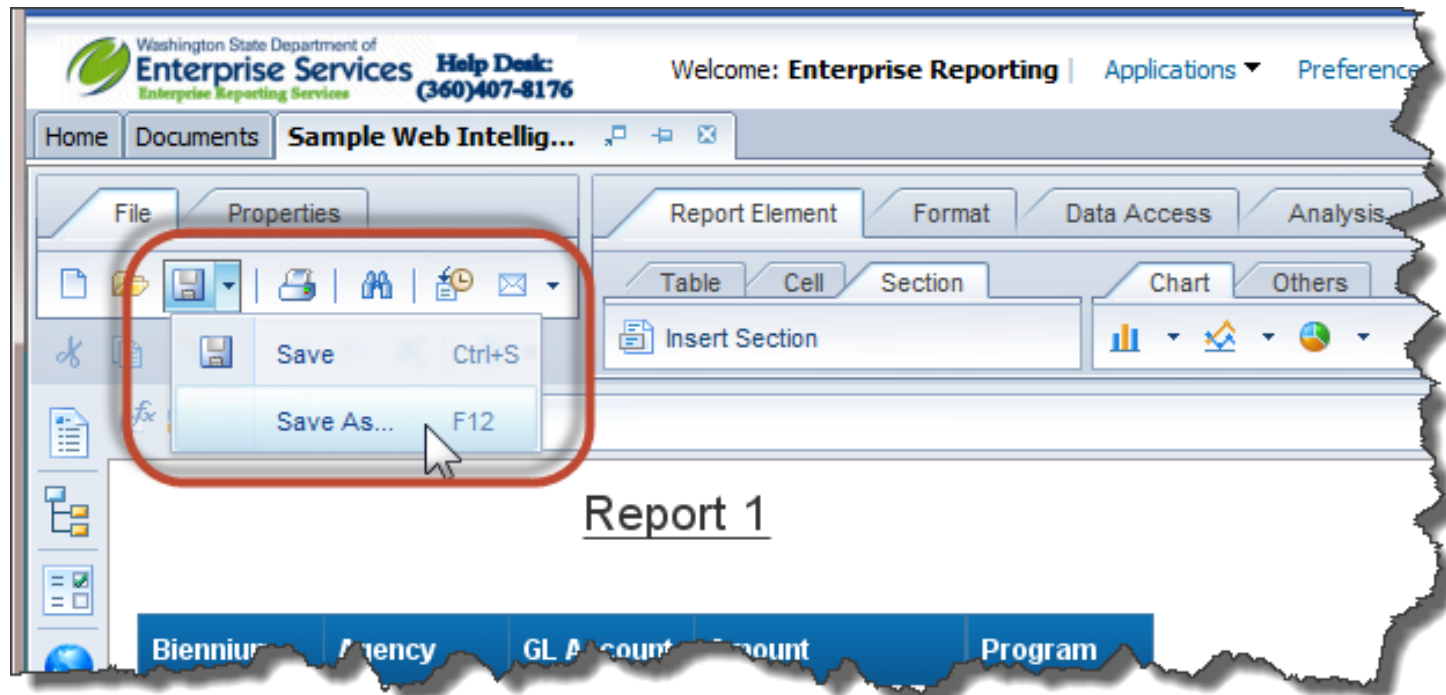
**Copies**

Number of copies: 1 ▼

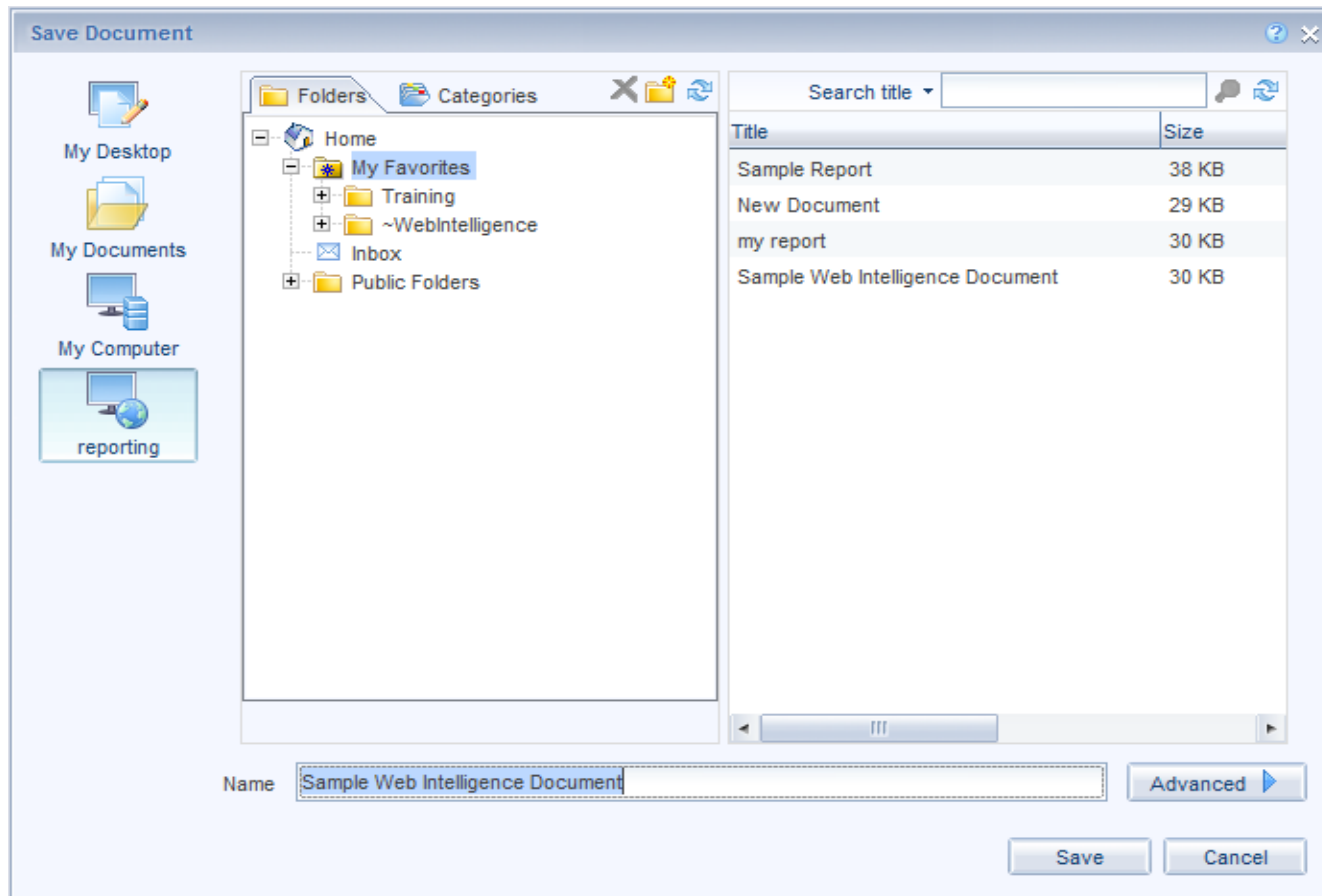
OK Cancel

# Exporting Reports

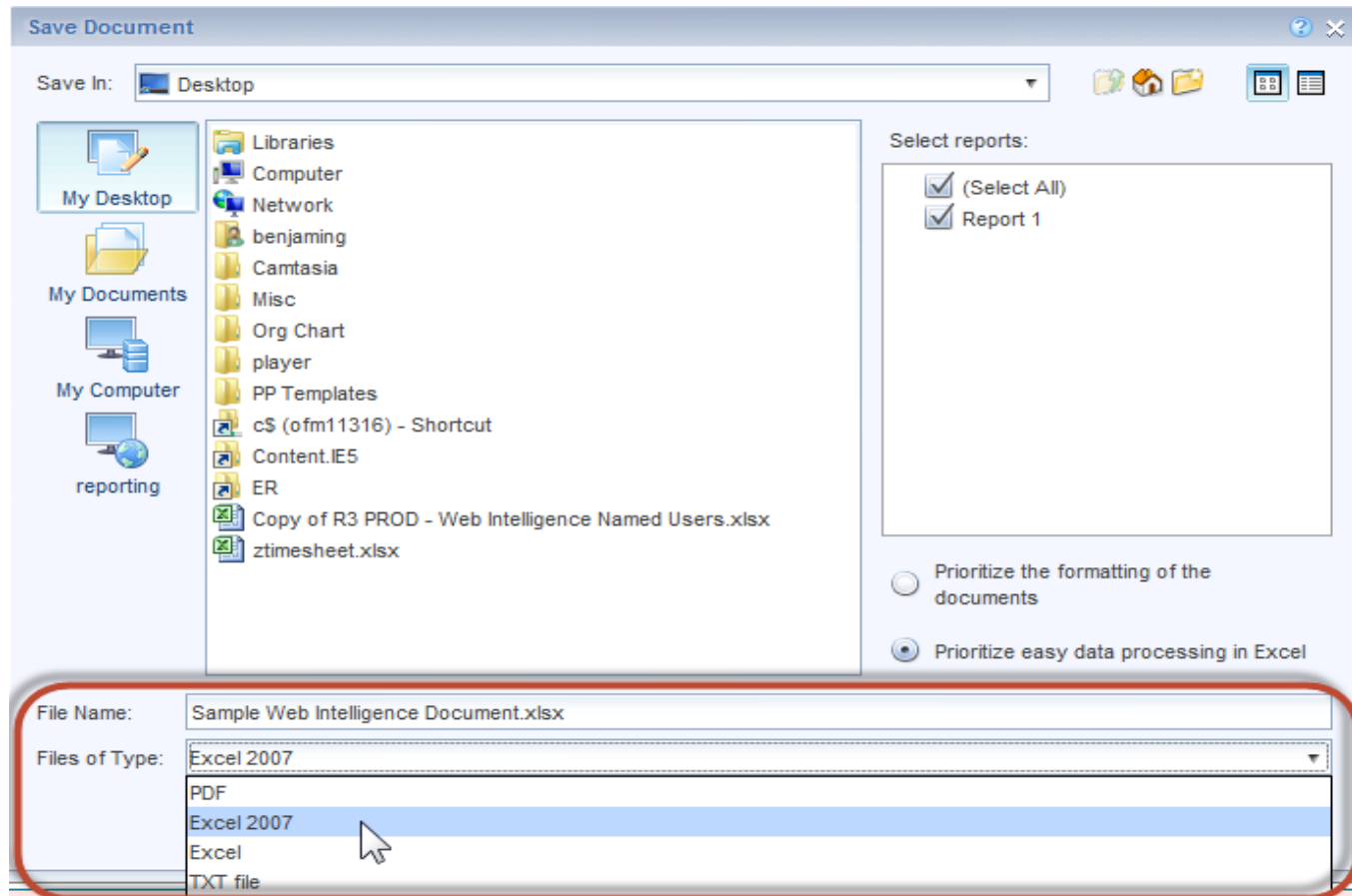
1. To export a report click on the dropdown arrow next to the **Save** icon and select **Save as**.



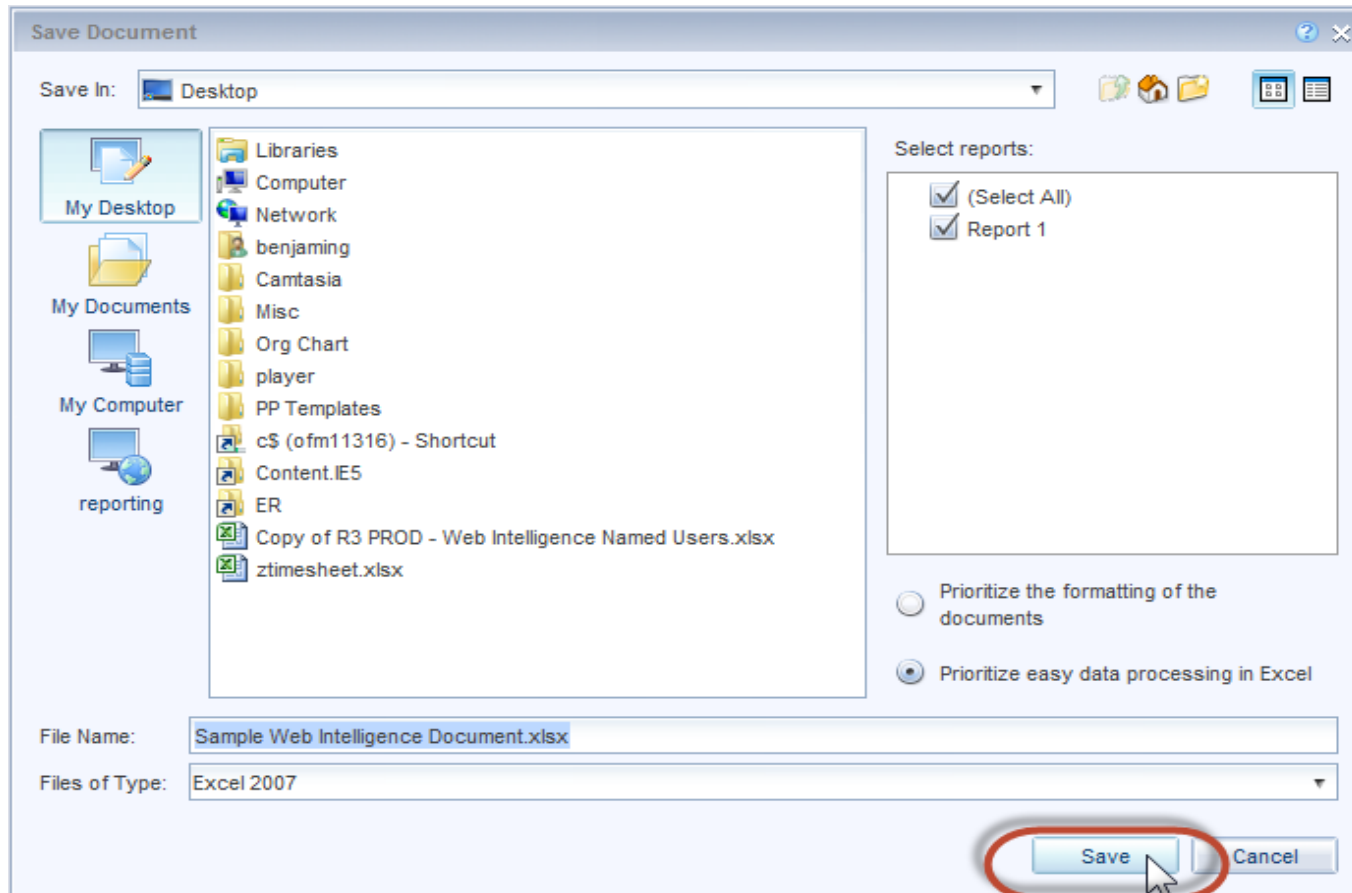
2. When **Save as** is clicked the **Save** dialogue box displays. Select **My Desktop**, **My Documents**, or **My Computer** as the location.



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



## 5. Click **Save**.





# Chapter 8

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## Viewing and Scheduling Reports



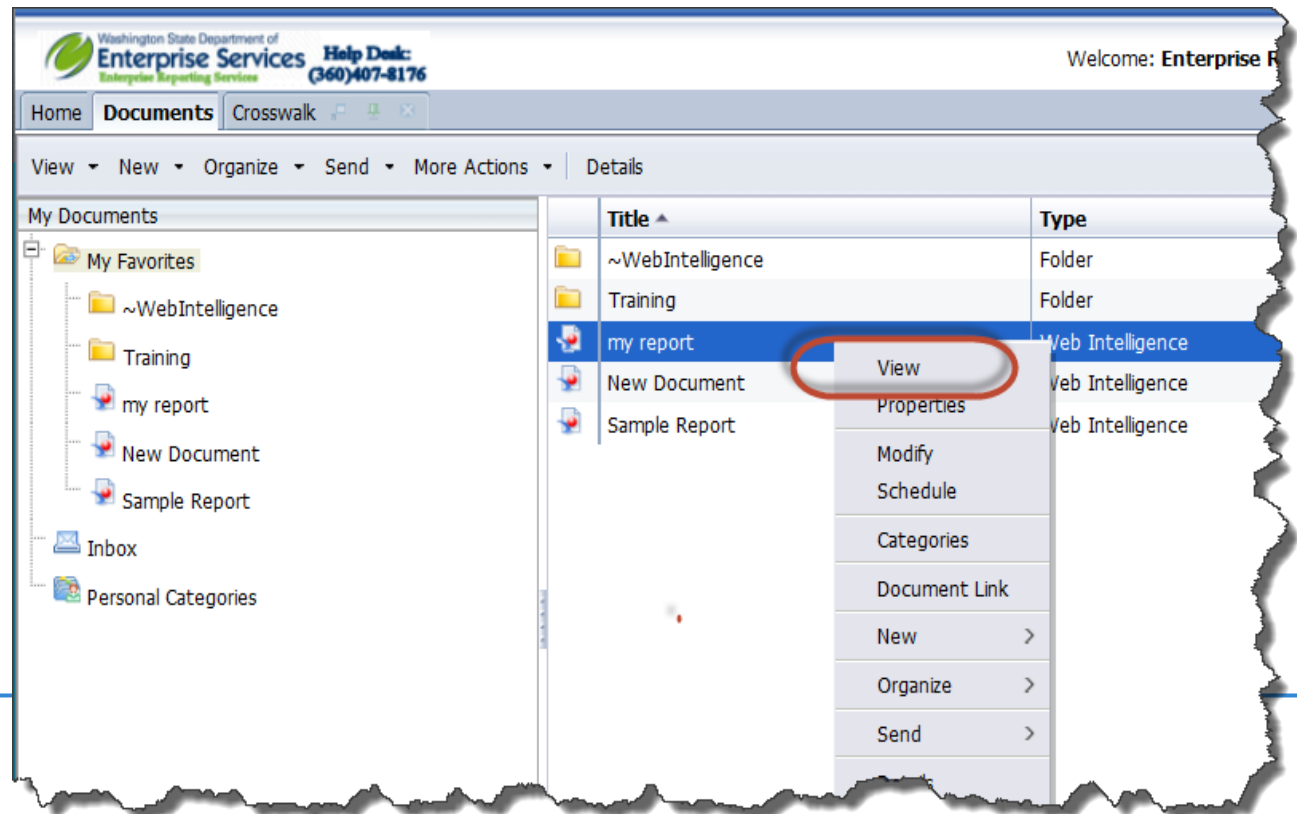
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# Viewing Existing Documents

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

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



# Viewing Existing Documents

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

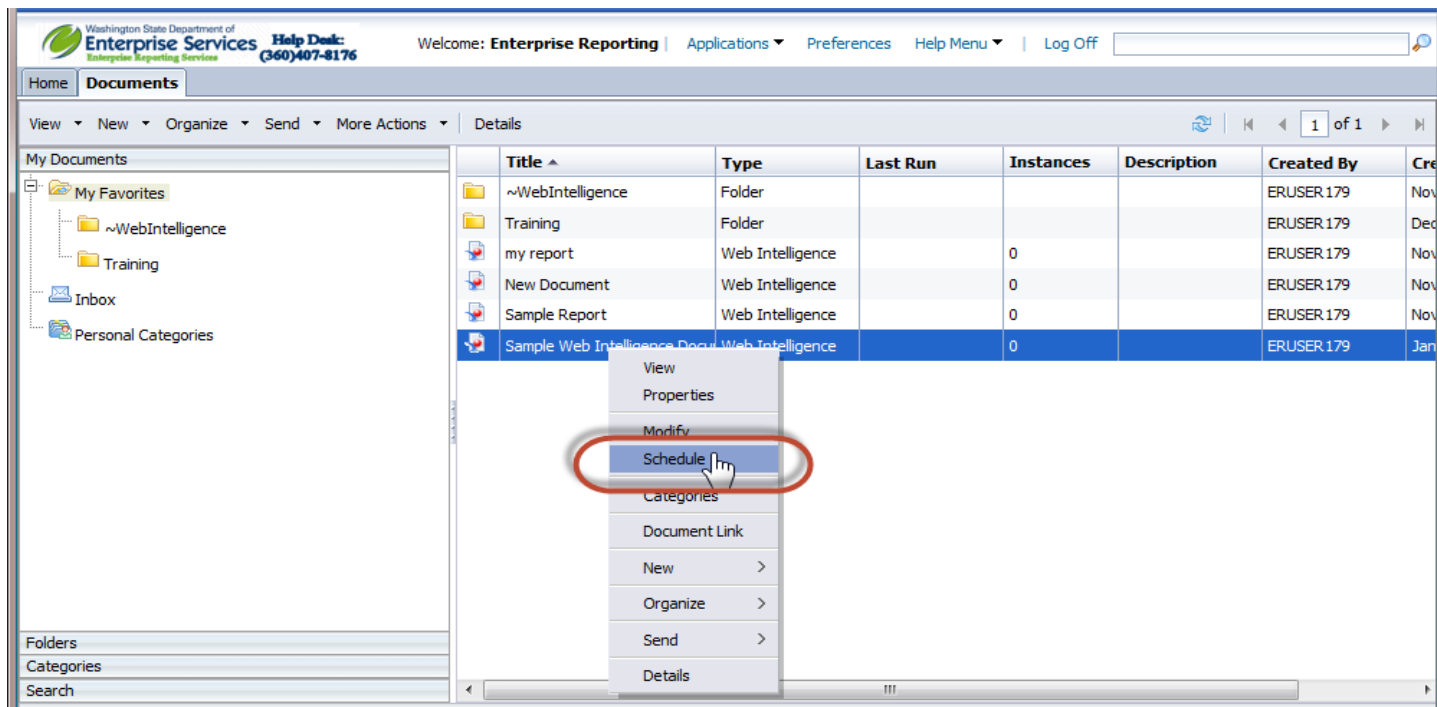
The screenshot displays the Enterprise Reporting Services web application. The top navigation bar includes the Washington State Department of Enterprise Services logo, a Help Desk contact number (360)407-8176, and a welcome message for 'Enterprise Reporting'. The main menu contains links for Home, Documents, Crosswalk, and New Document. A secondary toolbar offers options like Web Intelligence, Track, Drill, Filter Bar, and Outline. The central area shows a report titled 'Report 1' containing a table with four columns: Fiscal Year, Fiscal Month, Program, and Amount. The table lists 15 rows of data for the years 2012 and 2011. The bottom status bar indicates 'Track Changes: Off', 'Page 1 of 1', a 100% zoom level, and a timestamp of '2 minutes ago'.

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

# Scheduling Reports

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

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



4. The schedule Dialogue will open.

The screenshot shows a Windows-style dialog box titled "Schedule - Sample Web Intelligence Document". On the left is a sidebar with a tree view containing the following items: "Schedule" (expanded), "Instance Title", "Recurrence", "Formats", "Caching", "Events", "Scheduling Server Group", and "Destinations". The "Instance Title" item is selected, and its corresponding field in the main area contains the text "Sample Web Intelligence Document". At the bottom right of the dialog are two buttons: "Schedule" and "Cancel".

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

The following additional options are available:

- **Once**

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

- **Hourly**

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

- **Daily**

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

- **Weekly**

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

- **Monthly**

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

- **Nth Day of Month**

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

- **1st Monday of Month**

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

- **Last Day of Month**

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

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

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

- **Calendar**

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

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

You can schedule to the following destination locations:

- **Default Enterprise Location**

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

- **BI Inbox**

This option saves the instance to BI Inboxes specified.

- **Email**

This option sends the instance to the specified email recipients.

- **FTP Server**

This option saves the instance to the specified FTP server.

- **File System**

This option saves the instance to the specified file location.

11. Click Schedule



# Removing Scheduled Reports

1. Locate the Report History by right clicking on the reports which shows active instances
2. Select History

Washington State Department of Enterprise Services  
Enterprise Reporting Services  
Help Desk (360)407-9100

Home Documents

View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details

My Documents

- My Favorites
  - ~WebIntelligence
  - Test Queries
- Inbox
- My Alerts
- Subscribed Alerts
- Personal Categories

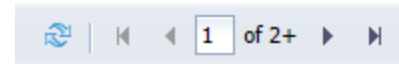
Title ^	Type	Last Run	Instances
35889044_LSDF 2017 with Prompts_0	Web Intelligence		0
ADD5 - Transactive Cl...	Web Intelligence		2
AFHDo	Web Intelligence		0
H52 A...	Web Intelligence	(2011 2013 2015) : 10274586 : 25234083	0
LSDF 2	Web Intelligence		0
LSDF 2	Web Intelligence		0
LSDF 2	Web Intelligence		0
TestW...	Web Intelligence		0
WCDR...	Web Intelligence	AST2015to2017	0

Context Menu Options:

- View
- View Latest Instance
- Properties
- Modify
- Schedule
- Mobile Properties
- History
- Categories
- Document Link
- New >
- Organize >
- Send >
- Details

# Removing Scheduled Reports

3. Find the recurring instance and right click
  - a) You may need to sort the columns or use the paging tools if you have more than one page of report history
4. Select Organize and then Delete



History – ADDS - Transaction GL

View ▾ | Organize ▾ | Send ▾ | More Actions ▾

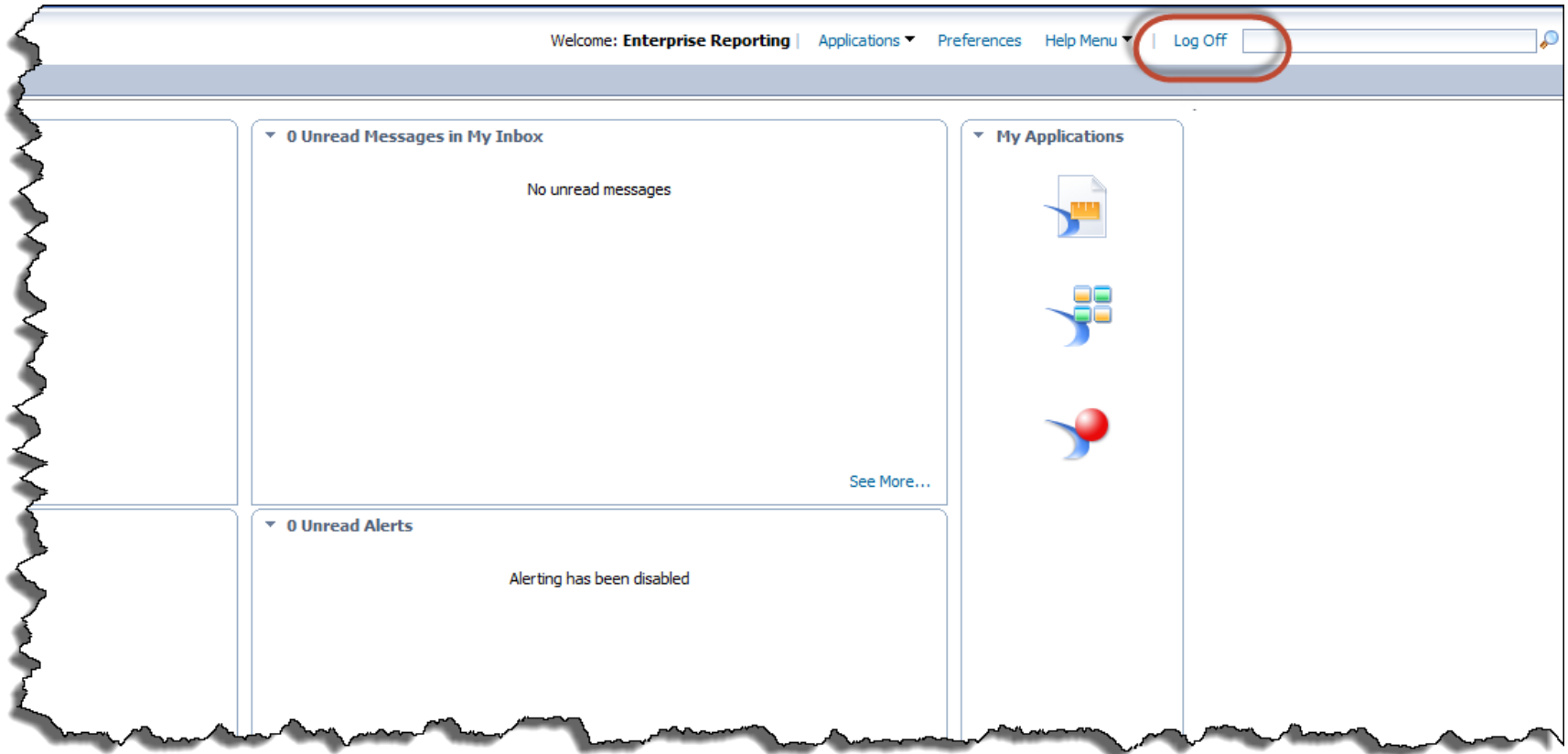
HistoryStatus View Organize More Actions Pause Run Now

	Instance Time ▾	Title	Status	Created By	Type	Parameters
	Dec 10, 2015 5:08 PM	ADDS - Transaction GL	Success	guldand163	Web Intelligence	116
	Dec 10, 2015 5:08 PM	ADDS - Transaction GL	Recurring	guldand163	Web Intelligence	

The screenshot shows a table with two rows. The first row has a green checkmark icon in the first column. The second row has a blue icon with a circular arrow in the first column. A context menu is open over the second row, with 'Organize' selected and 'Delete' highlighted. The 'Recurring' status in the third column of the second row is circled in red. The blue icon in the first column of the second row is also circled in red.

# *Questions*

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



# Additional Resources

## SAP Business Objects Web Intelligence Product Tutorials

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

