Reporting with Web Intelligence

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3:15 - 4:15 pm
Workshop Presenter

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Please ...

• Turn off cell phones.
• Avoid side conversations.
• Hold questions until designated times during presentation.
• Sign the attendance roster.
• Complete the evaluation at the end of the workshop.
Workshop Objectives

By the end of this session, you will understand:

• What is Web Intelligence
• Requesting Data Warehouse Access
• Creating & running a basic query
• Reporting features for Data Analysis
• Web Intelligence Training Options
What is Web Intelligence?

- Web Intelligence is the BusinessObjects tool for reporting and data analysis.
- Available in Web-based (via EDDIE) & Desktop versions (Web Intelligence Rich Client).
- Allows for specific use reporting.
- Great for researching transactions and finding greater details.
Types of Web Intelligence Reports

Standard Reports:

- Canned Web Intelligence Reports found in EDDIE
- Finance Reports owned by OBFS
- USC requests access from the AITS Security Application
  - Cannot modify query.
  - Can modify/format reports (Click Design in upper left corner of report window in EDDIE)
Types of Web Intelligence Reports

Solution Library Reports:

– Web Intelligence Reports found on the Decision Support website and in EDDIE
– Created and owned by Decision Support.
– Need Data Warehouse access to run.
– Can view and modify the queries and modify / format reports.

https://www.aits.uillinois.edu/services/reports_and_data/reports/solution_library/
Types of Web Intelligence Reports

Ad Hoc Reports:

- Use Web Intelligence to create your own reports.
- Need Data Warehouse access.
- Select your data source, build your query, format and create difference report views.
- Save and run locally using Web Intelligence Rich Client, or using Web Intelligence HTML in EDDIE.
Getting Started

• Data Warehouse access is needed to use Web Intelligence. Your Unit Security Contact (USC) creates request using the DS USC Application

• Login to EDDIE:
  – Install Web Intelligence Rich Client
  – Set Web Intelligence Preferences
  – Launch Web Intelligence from EDDIE home page
Creating an Adhoc Report

- Select a Data Source
- Build a query
- Run the query
- Format report
- Save the report
- Save results to Excel/PDF to share
Selecting a Data Source

**Universe:**
A database interface that maps objects to fields in the database

**Excel:**
Pull data from Excel spreadsheets to use in Web Intelligence reports
Selecting a Data Source

- Choose your Universe

![Universe Selection Screen]

- Operating Ledger Reporting
- EDW - Finance Posted Transactions
- EDW - Finance Purch Order Invoices
- EDW - Finance Travel & Expense
Building a Query

Result Objects

Determine your report columns
Building a Query

Query Filters

limit the rows returned
Want Results?

Click here!
Format and Analyze

• **Format**
  – Wrap text, format fonts & numbers

• **Sort Data**

• **Breaks**

• **Calculations**
  – Sums, Counts, Min, Max, Avg, Percentage

• **Create additional report views**
  – Filtered results, Summaries, Charts, Graphs, Cross-tabs
Save and Share

• **Save as Web Intelligence**
  
  – Saves the query and the report formatting

• **Save as Excel or PDF**
  
  – Share results, Save historic records

• **Save as CSV**
  
  – Export raw data

• **Save to Enterprise (EDDIE)**
  
  – Back-up copy, Report Scheduling
Web Intelligence Training

• Web Intelligence Reporting Basics
• Practice Labs
  – Get help with adhoc reporting questions
  – Learn how to use the Solution Library reports
• Register at
  http://go.uillinois.edu/registration
Web Intelligence Online Resources

- User Guides
- Quick Tips
- Advanced Features
- [https://www.aits.uillinois.edu/services/reports_and_data/help_and_training/business_objects_4_1_resources/](https://www.aits.uillinois.edu/services/reports_and_data/help_and_training/business_objects_4_1_resources/)
Questions / Concerns?