Overview of Web Intelligence & Preview of UI Reports Dashboard

Tuesday, April 1, 2014

10:15 – 11:15am

UIC UNIVERSITY OF ILLINOIS AT CHICAGO

UIC

Lincoln Hall

707South Morgan Street

Workshop Presenters

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Please ...

- Turn off cell phones.

- Avoid side conversations.

- Please hold questions until the end of presentation.

- Sign the attendance roster.

- Complete the evaluation at the end of the workshop.

Workshop Objectives

- Understand the Business Objects XI4.1 Upgrade Project and it's impact on you

- Know the benefits of using Web Intelligence

- Learn about Webi Training Opportunities

- Understand the new features available in Web Intelligence

- Understand the UI Reports Distribution Project

Topics

- Business Objects XI4.1 Upgrade Project Overview and Timeline

- Impact of Upgrade on you

- Web Intelligence Training Opportunities

- Advantages of Web Intelligence

- Demonstration of Web Intelligence XI3.1

- Preview of UI Reports Dashboard

- Q&A

Terminology

- **Business Objects (BO):** Software suite of report creation, viewing, and distribution tools

- **EDDIE/InfoView:** Secured Web-based Business Objects Content Management System (CMS) that allows you to store, retrieve, view, and print BO reports

- **Web Intelligence (Webi):** Reporting software used to create, edit, and analyze Business Intelligence Reports. It can be accessed online through EDDIE, or from your desktop using Web Intelligence Rich Client

Terminology

- **Desktop Intelligence (Deski):** Reporting software used to create, edit, and analyze Business Intelligence Reports. Deski will be phased out of Business Objects with release 4.1.

- **Report Conversion Tool:** Tool that converts Deski Reports (.rpt) into Webi Reports (.wid)

- **Standard Reports:** Pre-developed reports in EDDIE/InfoView or ViewDirect (VDR). Centrally developed/supported and will be converted by AITS/Decision Support. No need to convert your personal copy.

- **Ad-hoc Reports:** User created reports. These reports are locally developed/supported. These reports will need to be converted by the owner of the report.

Business Objects XI 4.1 Upgrade Project Overview

The upgrade consists of 5 sub-projects:

1. Deski Conversion Analysis (8/20/12 - 5/31/13)

2. Standard Report Deski Conversion (3/1/13 - 9/1/14)

3. Ad-hoc Report Deski Conversion (6/3/13 – 9/29/14)

4. BO XI4.1 Upgrade Analysis (10/1/13 - 4/1/14)

5. BO XI4.1 Upgrade Implementation (4/1/14 – 9/30/14)

How am I going to be Impacted by the Upgrade?

- BO XI4.1 Upgrade is tentatively schedule for **September 29, 2014**

- Desktop Intelligence is not available in BO XI4.1

- We are transitioning to Web Intelligence as our primary reporting tool.

- Prior to upgrade, all ad-hoc Deski reports need to be converted to Webi. This should be done now, in BO XI3.1

Converting from Deski to Webi

- Web Intelligence Rich Client is available now in BO XI3.1.

- If you have access to Deski, you have access to Webi.

- Begin creating new reports in Web Intelligence

- Convert all ad-hoc Deski reports to Web Intelligence using the Report Conversion Tool

Report Conversion Services

- **Report Conversion Tool:**

  All users have access to the conversion tool via Remote Desktop Connection

- **Training:** Offering two training classes
  - Web Intelligence Reporting Basics (new BO users)
  - Transition to Web Intelligence (existing Deski users)

- **Report Conversion labs:**
  - Live monthly labs
  - Virtual Report Conversion Assistance

Benefits of Web Intelligence

- Interactive Viewing over the Web (sort, filter, formula & variable creation, etc.)
- Input Controls
- Track Data Changes
- Database Ranking
- Duplicate query
- Extended function set

- Document Drilling over the Web
- Improved Prompting
- Optional Prompts
- Query prompt properties
- Query prompt sequence
- Format Painter

Demo of Web Intelligence XI3.1
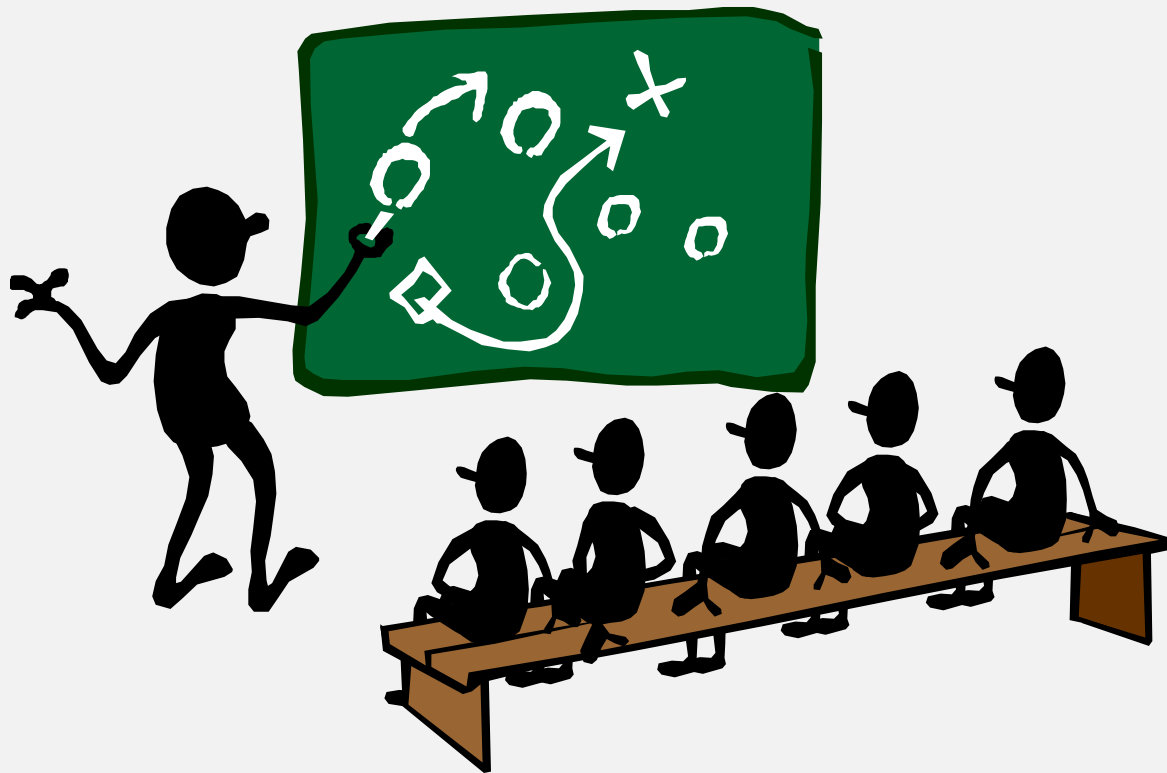
UI Reports Distribution

- ## Project Objective:

- Provide an automated mechanism to get Business Managers and others financial report information that is useful for decision making:

  - Timely – no more waiting for monthly reports to be distributed
  - Accurate and specific to your accounts
    - Dashboard will provide an overview of financials based on roles defined in the System Role Management Application.
    - 12 reports accessible via the dashboard

UI Reports Distribution Prototype

UI Reports Distribution Prototype

Please note: The figures represented are not actuals.

Role Management Application

- Role Application features
  - Manages and maintains Role Access to Finance Reports Distribution System Dashboard
  - Allows access to relevant information based on the individual's role
  - Self-service web application for Business Administrators, Principal Investigators, Faculty and other Staff

- Target audience
  - Individuals from units/departments that need to assign and manage roles to the Finance Reports Distribution System Dashboard
  - Role application determines the default financial information displayed in the Dashboard

Role Types

Role	Role Assignment in Role App	Default View in Role App	View/Search in Dashboard
Owner/ Viewer	Owner can assign all roles at current level and below.	Default view at current Org assignment and below. Can search at any level, anywhere in Role Application.	Orgs, Grants, Funds and CFOPs at Org level and below.
Grant Owner/ Grant Viewer	Grant Owner can assign Grant Owner/Viewer, Fund Owner/Viewer, Project Owner/Viewer at current level and below.	Default view at Grant assignment and below. Can search at any level, anywhere in Role Application.	Grants, Funds and CFOPs at Grant level and below.
Fund Owner/ Fund Viewer	Fund Owner can assign Fund Owner/Viewer, Project Owner/Viewer at current level and below.	Default view at Fund assignment and below. Can search at any level, anywhere in Role Application.	Funds and CFOPs at Fund assignment level and below.
Project Owner /Project Viewer	Project Owner can assign Project Owner/Viewer at current level and below.	Default view at 6 digit CFOP (Project) and below. Can search at any level, anywhere in Role Application.	CFOPs at CFOP assignment level and below.

Role Management – Example 2
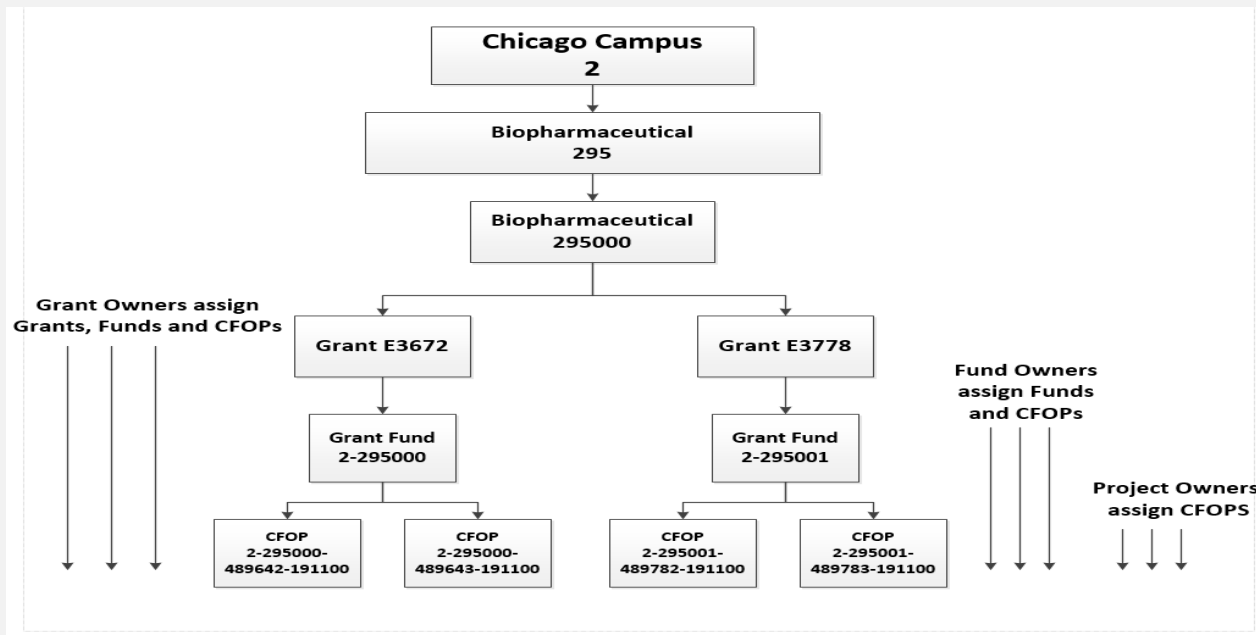
Reports Distribution / PI Portal
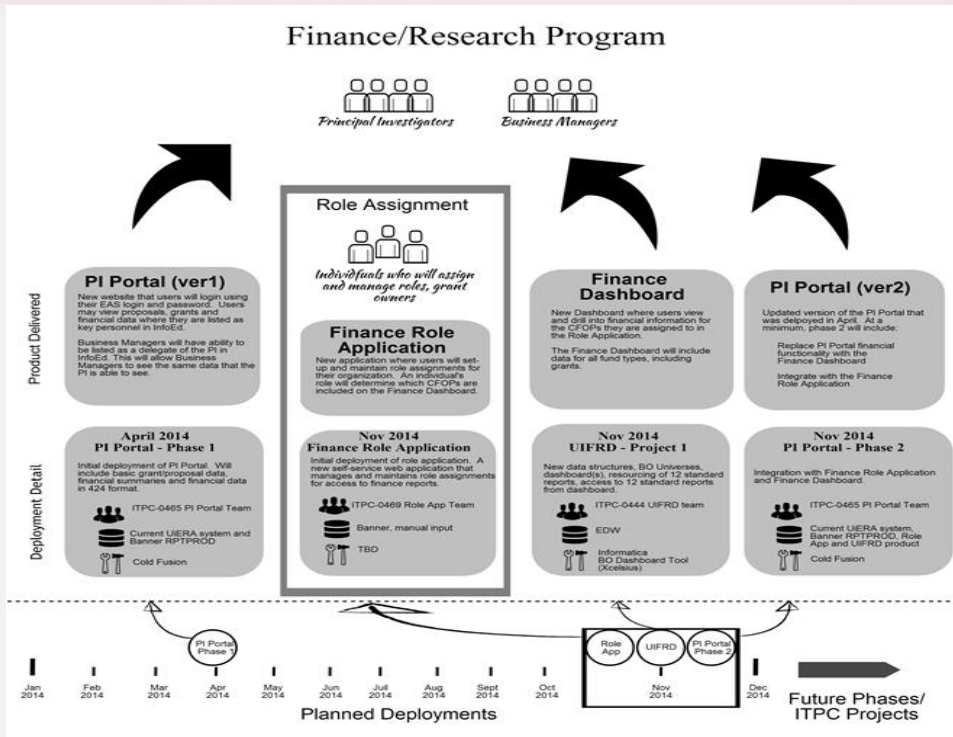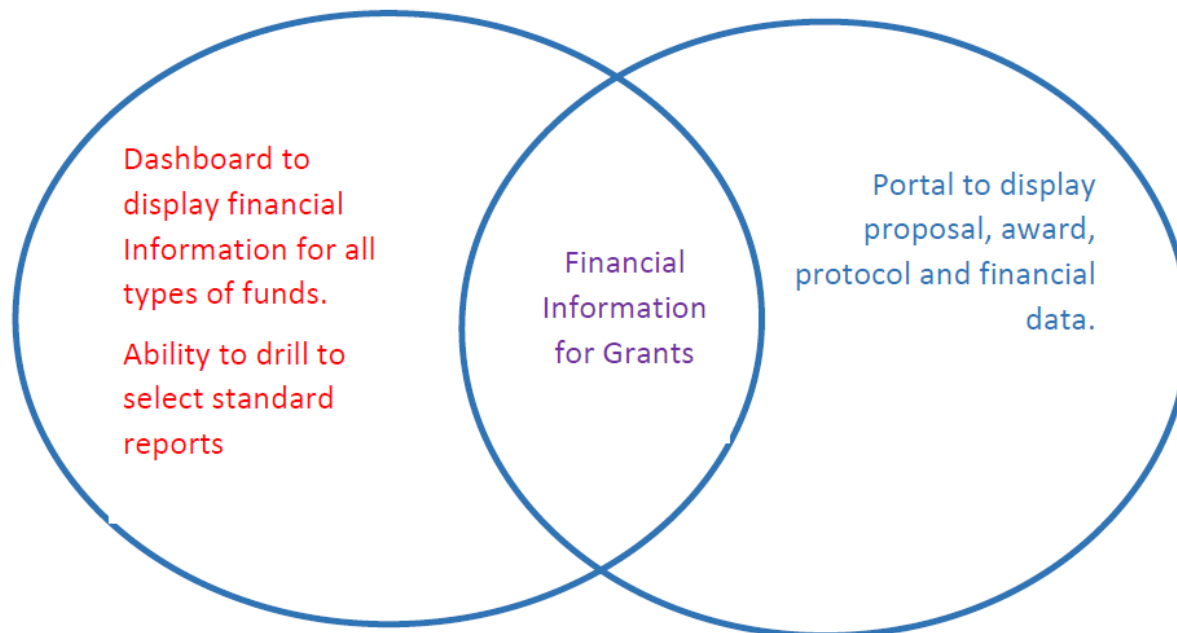
Reports Distribution/PI Portal

UI Reports Distribution and myResearch

UI Reports Distribution:

Interactive access for business manager and faculty to financial information pre-filtered based on Role App entries.

myResearch:

Central point for both faculty members and staff to access information on related to sponsored research.

Dashboard to display financial Information for all types of funds.

Ability to drill to select standard reports

Financial Information for Grants

Portal to display proposal, award, protocol and financial data.

Questions / Concerns?