

2016 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

# Reporting with Web Intelligence

April 14, 2016

3:15 - 4:15 pm

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

**UIC**

Lincoln Hall

707 South Morgan Street

# Workshop Presenter

**Trish Curry**

- Training Specialist - AITS Decision Support
- [Trishak@uillinois.edu](mailto:Trishak@uillinois.edu)

# 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.

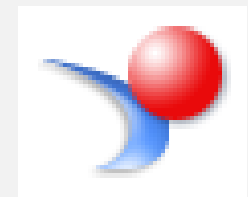
# Workshop Objectives

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.aitis.uillinois.edu/services/reports\\_and\\_data/reports/solution\\_library/](https://www.aitis.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:**

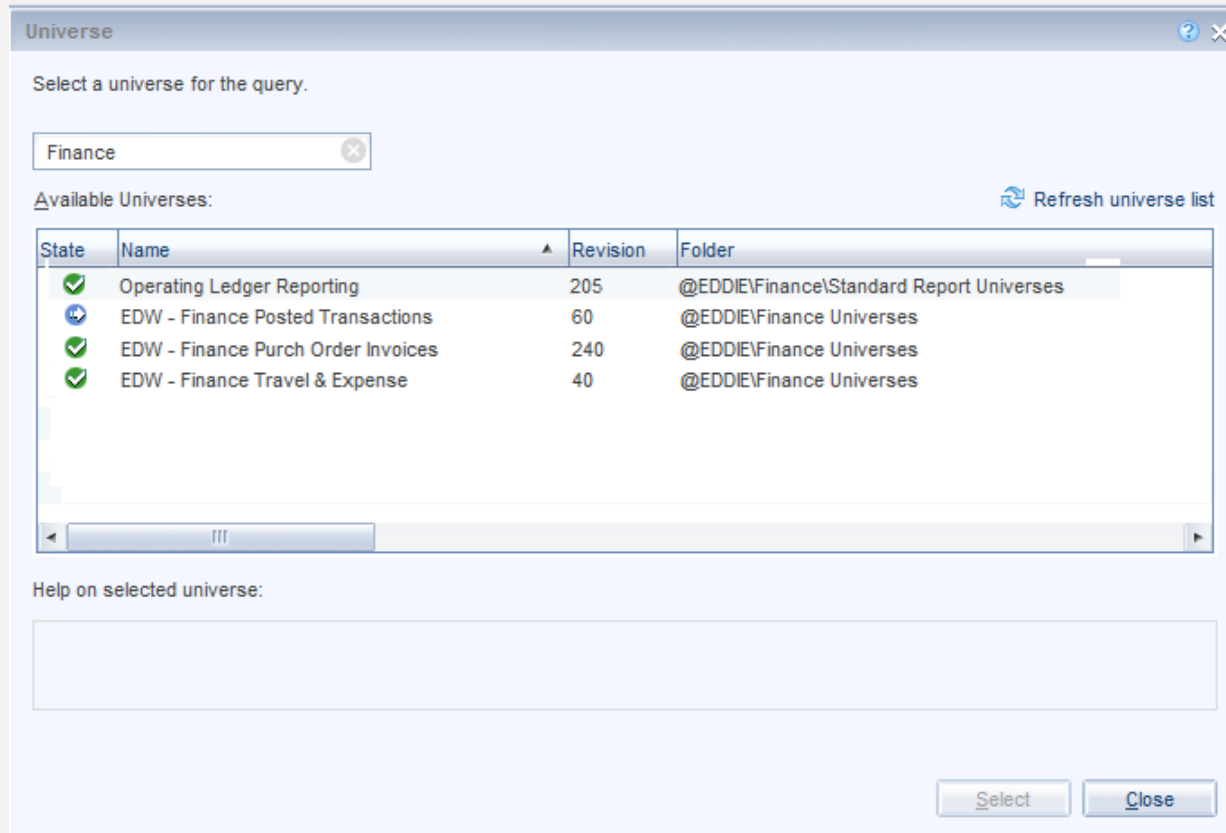
A database interface that maps objects to fields in the database

## **Excel:**

Pull data from Excel spreadsheets to use in Web Intelligence reports

# Selecting a Data Source

- Choose your Universe



# Building a Query

## Result Objects

The screenshot shows a 'Result Objects' configuration window with the following fields:

- UIN
- TEM User Name
- Manager Name
- ER Number
- ER Title
- ER Status
- ER Create Date
- ER Receipt Received Date
- ER Approved Date
- Manager Review Date
- ER File Date
- ER Paid Date
- College Cycle
- College To OBFS Lag
- OBFS Cycle
- Overall Time

## Determine your report columns

UIN	TEM User Name	Manager Name	ER Number	ER Title	ER Status	ER Create Date	ER Receipt Received Date	ER Approve d Date	Manag Review Date
650649924	Amanda M Bl	Harris, Richa	ER00850161	022415SanA	Processed	03/10/2015	03/10/2015	03/20/2015	03/11/2
650649924	Amanda M Bl	Harris, Richa	ER00907144		Create	05/12/2015			
650660774	Eric D. Aris	Harris, Richa	ER00707200	Enterprise Sv	Processed	12/17/2014		12/18/2014	12/17/15

# Building a Query

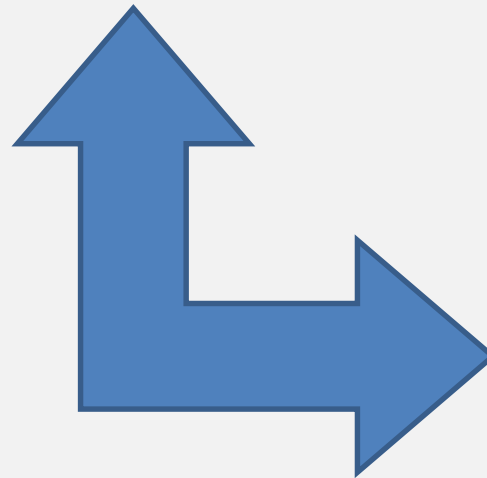
**Query Filters**

Home Organization Cd In list 699001

And Home Dept Cd In list 699

ER Create FY In list 2015

Query Filters  
limit  
the rows  
returned



UIN	TEM User Name
650649924	Amanda M
650649924	Amanda M
650669774	Erin R Arie
650669774	Erin R Arie
651209445	David J Ast
651383287	Richard S H
651383287	Richard S H
651383287	Richard S H
651383287	Richard S H
651513062	Steven L Bl
651780551	Marla S Mc

# Want Results?

**Click here!** → Run Query | Close

**Result Objects**

UIN | TEM User Name | Manager Name | ER Number | ER Title | ER Status

ER Create Date | ER Receipt Received Date | ER Approved Date | Manager Review Date

ER File Date | ER Paid Date | College Cycle | College To OBFS Lag | OBFS Cycle

**Query Filters**

Home Organization Cd In list

Home Dept Cd In list

ER Create FY In list

**Report 1**

UIN	TEM User Name	Manager Name	ER Number	ER Title	ER Status	ER Create Date	ER Receipt Received Date	ER Approved Date	Manager Review Date
650649924	Amanda M Bl	Harris, Richa	ER00850161	022415SanA	Processed	03/10/2015	03/10/2015	03/20/2015	03/11/20
650649924	Amanda M Bl	Harris, Richa	ER00907144		Create	05/12/2015			
650669774	Erin R Arie	Harris, Richa	ER00797388	Enterprise Sy	Processed	12/17/2014		12/18/2014	12/17/20
650669774	Erin R Arie	Harris, Richa	ER00799536	120914Chica	Processed	12/19/2014	12/19/2014	12/22/2014	12/19/20
651209445	David J Ashbi	Harris, Richa	ER00774885	111014Indiar	Processed	11/19/2014	11/19/2014	12/31/2014	12/01/20
651383287	Richard S Ha	Hites, Michae	ER00800273	111014Indiar	Processed	12/19/2014	12/19/2014	02/12/2015	01/30/20
651383287	Richard S Ha	Hites, Michae	ER00800320	101014Conf	Processed	12/19/2014	12/19/2014	01/29/2015	12/22/20
651383287	Richard S Ha	Hites, Michae	ER00826017	020515AITSL	Processed	02/06/2015	02/06/2015	05/28/2015	05/26/20

# 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.ait.s.uillinois.edu/services/reports\\_and\\_data/help\\_and\\_training/business\\_objects\\_4\\_1\\_resources/](https://www.ait.s.uillinois.edu/services/reports_and_data/help_and_training/business_objects_4_1_resources/)

Questions / Concerns?