Getting Started with WebIntelligence

Version 2.7

Windows

WebIntelligence™

Version 2.7

Getting Started with WebIntelligence

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Contents

Introduction

In this introduction

What Is the Goal of this Tutorial?

This tutorial aims to introduce first-time users to using INFOVIEW and WEBINTELLIGENCE. It's goal is to teach you how to view BUSINESSOBJECTS and WEBINTELLIGENCE documents in the corporate repository with INFOVIEW, and how to build WEBINTELLIGENCE documents using corporate data. The tutorial will also teach you how to analyze the data in the documents to help you make the decisions that affect your business.

Who is it aimed at?

This tutorial is aimed at users new to INFOVIEW and WEBINTELLIGENCE. We assume that you are familiar with using an internet browser.

What does the tutorial cover?

This tutorial covers aspects of query, reporting, analysis and document distribution in WebIntelligence.

We have tried to cover as many aspects of INFOVIEW and WEBINTELLIGENCE as possible to give first-time users a good grounding in the basics and to introduce you to the rich possibilities of WEBINTELLIGENCE and online reporting. A tutorial cannot, of course, cover everything. For further information on any of the tasks shown here (and more), see the *Webintelligence User's Guide* and the *InfoView User's Guide.*

How Does the Tutorial Work?

The tutorial is made up of six lessons. The objective of each lesson is to learn a set of skills to solve a business task. You will do this by progressively building on the document that you create in the first lesson. Each lesson shows you how to carry out the tasks needed to build on the document by taking you through step-by-step exercises.

You can do the lessons in or out of sequence. However, the lessons have been designed to gradually increase the complexity of the tasks you have to carry out, building on what you have learned in the previous lessons. Each lesson will take you between 10 and 15 minutes to do.

The lessons in this tutorial are based on the eFashion demo materials that you will find delivered on the BUSINESSOBJECTS installation CD.

New task

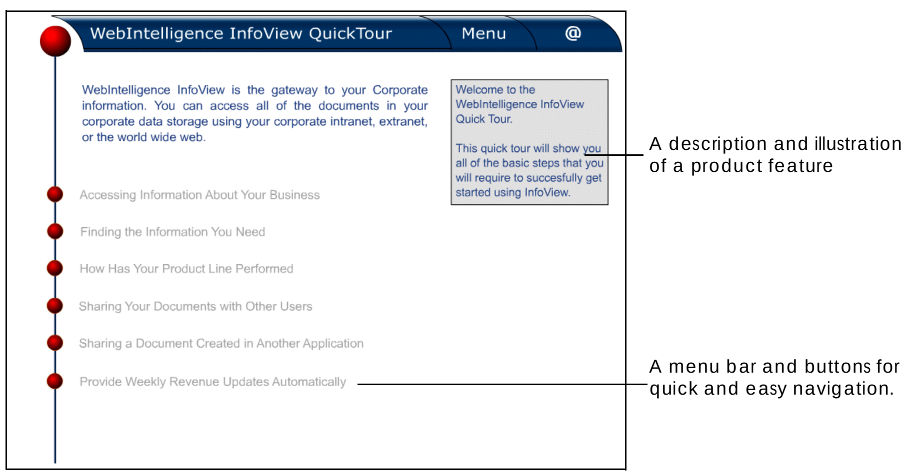
The first time you carry out a task in this tutorial, we give you a full explanation of how to do it with a detailed step-by-step procedure.

Recap task

As you progress through the lessons, you may have to carry out the same task again. If a task has already been explained, we will not always give the detailed procedure again. If you need a reminder of how to do it, look at the index to find out where the procedure is described in detail.

Multimedia Quick Tour

For some of the tasks described in this tutorial, there is also an animated demonstration in the multimedia Quick Tour. You can open the Quick Tour directly from the InfoView Help page menu.



An actual screen from Quick Tour

Finished Documents

At the beginning of each lesson, we show the document that the lesson will teach you to build and then take you through the steps to do it.

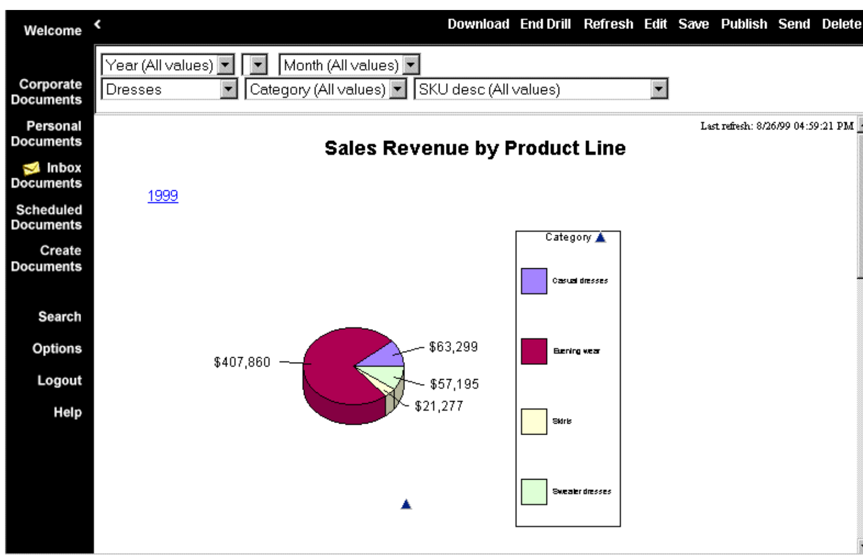
If you want to look at a finished document, a sample of a document for each lesson is in the Personal Documents list in INFOVIEW under the category Getting Started.

Storyline

It is the year 2001 and you are the owner of an eFashion franchise. eFashion is a successful retail store selling fashion merchandise in 11 US cities. The company currently sells 211 products across 12 different product lines.

You work closely with eFashion Head Quarters in New York. All eFashion stores are connected to a collective database that you use to analyze the success of your store and other eFashion outlets. You use INFOVIEW and WEBINTELLIGENCE to view and produce corporate and personal documents.

You are currently putting together a document on the performance of your franchise over the past three years, this year being 2001. Some of these documents will be sent to selected individuals within the company and others will be published and available to all company employees.



What do I Need to do the Tutorial?

To do the tutorial, you need to have an internet browser installed on your computer. The following files are installed as part of the eFashion demo kit and are on the WEBINTELLIGENCE server. If they have not been installed, ask your system's administrator to install them for you.

eFashion demo materials

You will need the following demo files:

File name	File Type	Default Location
Efashion.unv	BUSINESSOBJECTS universe.	BusinessObjects\BusinessObjects 5.0\Universe
Efashion.mdb	Microsoft Access database.	BusinessObjects\Demo
lesson1.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
lesson2.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
lesson3.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
lesson4.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
lesson5.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
lesson6.wqy	WebIntelligence sample document	BusinessObjects 5.0\UserDocs
eFashion.rep	BusinessObjects document	BusinessObjects 5.0\UserDocs

Quick Lesson Overview

The table below gives a brief overview of the six lessons in this tutorial:

Lesson	Business question	Learn how to.....	Document Title
1	What types of documents are in the corporate database, and how do I manage these documents with INFOVIEW?	Log in to Infoview and find the document you need. View BUSINESSOBJECTS and WEBINTELLIGENCE documents, and make the documents available to other users.	lesson3 lesson1 Efashion.rep
2	How much revenue did my store generate this year?	Create a simple query to begin building and formatting your document. Add a predefined condition to the query.	lesson2
3	How can I view the data for only my state?	Remove the condition on the year. Divide the document into sections and format the data in the table	lesson3
4	How do I limit the information displayed in the table?	Change the table style of the document and add more data to the table before limiting the information displayed.	lesson4
5	Which product lines produced the most revenue?	Break up the data in the document and calculate the total amount of revenue generated for all product lines. Download the data into a spreadsheet.	lesson5
6	How has each product line performed?	Change a table to a chart and drill on the chart to analyze the data.	lesson6

Your Comments are Welcome

Your opinions are the most important input we receive as we revise BUSINESSOBJECTS documentation.

You can contact us by e-mail at documentation@businessobjects.com.

To find out information about BUSINESSOBJECTS products and services, visit our World Wide Web site at http://www.businessobjects.com.

This site also provides information on contacting our technical support services.

Lesson 1

Accessing Information About Your Business

In this lesson

- **Business question**
  How do I access the corporate infomation available to me?
- **Learning objective**
  Learn how to use INFOVIEW to search, view and manage corporate documents.
- **Time 20 minutes**

Objective

INFOVIEW allows you to access the documents on your company's WEBINTELLIGENCE system from your home, office, or anywhere in the world, through an intranet, extranet, or the World Wide Web.

To use INFOVIEW, you don't need to install any additional software on your computer. All you need is a standard Web or Internet browser.

If you are a WEBINTELLIGENCE or BUSINESSOBJECTS user, you use INFOVIEW as an entry point for viewing, managing, distributing, and downloading documents.

This lesson teaches you how to access the corporate and personal documents available to you through INFOVIEW. It also explains how you can use INFOVIEW to manage those documents and make the most of the information your corporate database has to offer.

Before You Begin

Before starting this tutorial, you must obtain the following items from your systems administrator:

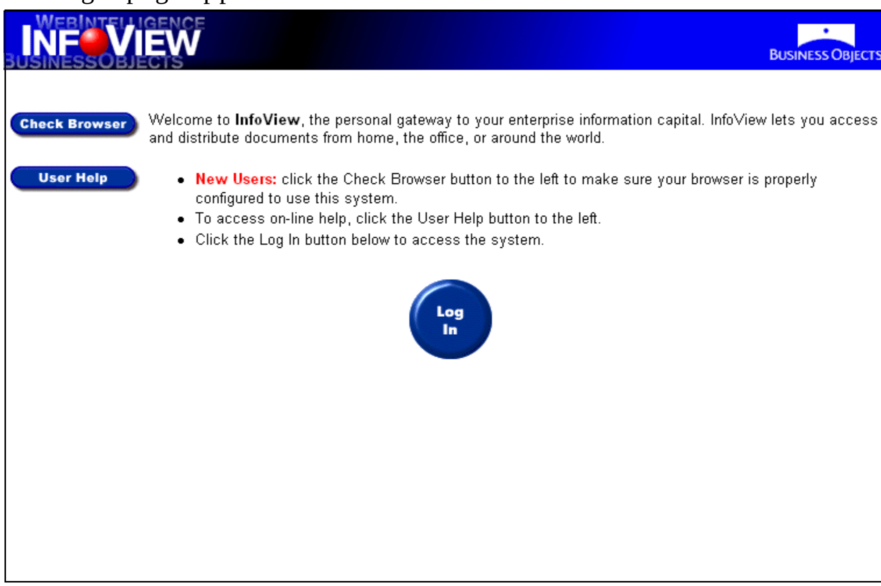
- The URL for accessing INFOVIEW with your web browser.
- Your user name and password to log into INFOVIEW.

Note: If you already have access to BUSINESSOBJECTS, you can use the same login information.

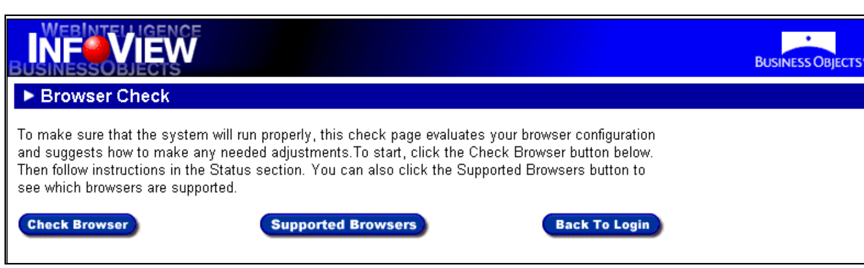
Log into InfoView

To access documents, you must first log into INFOVIEW and check to make sure that you are using a compatible browser. To do this:

1. Open your browser and enter the URL for INFOVIEW provided by your systems administrator.
The login page appears.

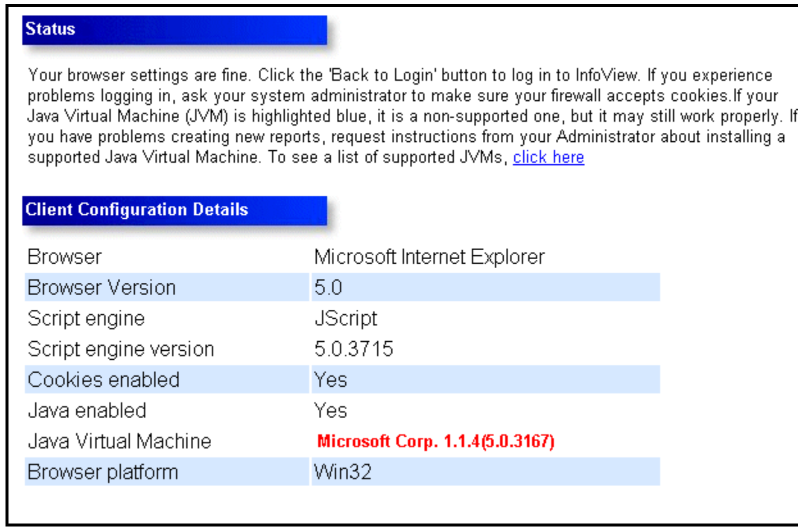


2. Click Check Browser. The Quick Browser Check page opens.



3. Click Check Browser.

After a few seconds, INFOVIEW displays information about the browser you're currently using in the lower part of the page.

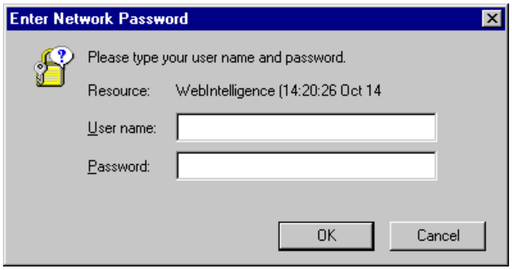


If you can't see all this information, use the scrollbar to scroll downward.

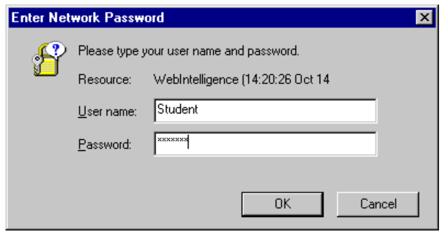
In this page's fields, fatal problems are displayed in bold and in red. Warnings are highlighted in bright blue.

Note: If your browser isn't JavaScript-enabled, it cannot run the Check Browser feature, and an error message appears.
If your Java Virtual Machine (JVM) was highlighted in blue when you performed the Quick Browser Check, then the JVM you are using is a non-supported one. INFOVIEW may still work properly, but if you encounter any problems when creating documents in WEBINTELLIGENCE, you may need to install a new JVM. Click Supported Browser for a list of supported browsers and instructions on where to find them.

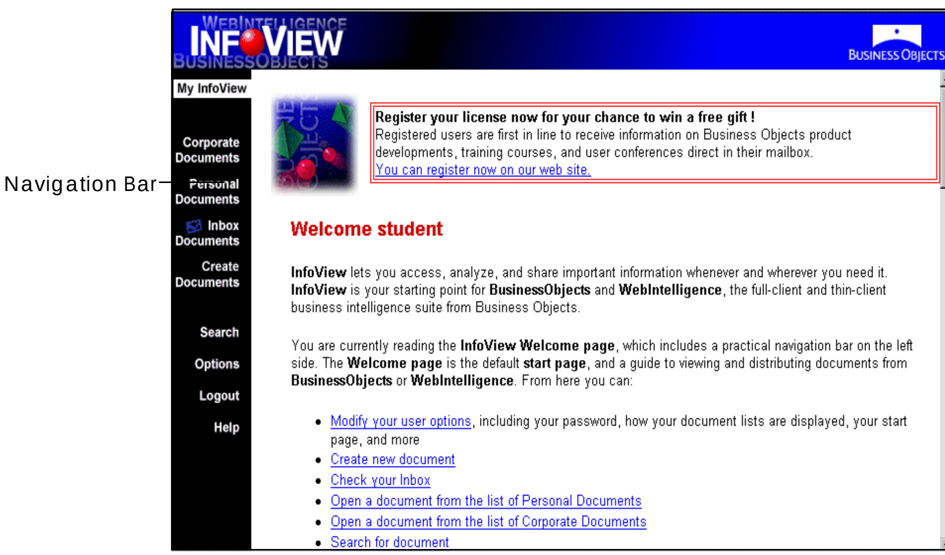
4. For a suggested solution to any problem or warning, simply click on the text.
5. For a list of supported browsers, click Supported Browsers.
6. Click the Back to Login button to return to the INFOVIEW login page.
7. Click the Log In button.
   The Login dialog box appears.



8. Enter Student for User name and Password for the purpose of this tutorial. When you begin to use INFOVIEW regularly, log in with the user name and password given to you by your systems administrator for regular use.



9. Click OK.
Your Welcome page appears.



The Welcome page is your default start page. Through the Options page in INFOVIEW, you can choose to display a document list as your start page or create a personal start page with My InfoView. Later in this lesson you will learn how to customize your My InfoView page to display the information that you need most.

The Navigation Bar

The navigation bar on the left side of the page remains constant no matter what page you open. The links it contains are determined by your user profile.

Depending on the access rights you've been given by your BUSINESSOBJECTS supervisor, the navigation bar lets you access up to three different document catalogs:

- The Corporate Documents page: documents published to the corporate repository.
- The Personal Documents page: documents that you save for your own personal use.
- The Inbox Documents page: documents that have been sent to you by other users.

Depending on your user profile, you may have the option to click Create Documents on the navigation bar. In Lesson 2, "How Much Revenue Did My Stores Generate This Year?" on page 49 you will learn the first steps to creating a document with WEBINTELLIGENCE.

The navigation bar also gives you access to other INFOVIEW pages:

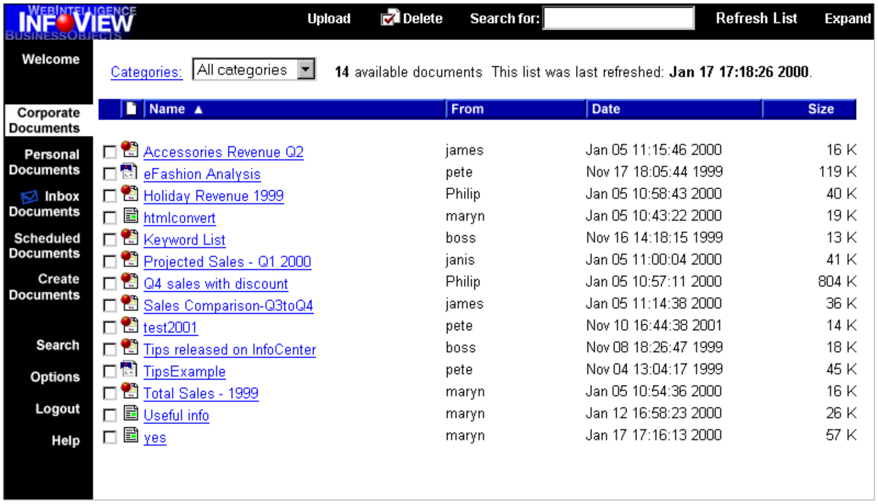
- The Welcome page ro My infoView
- The Search page
- The Options page
- The Help page

Find the Documents You Need

First we are going to look at the documents in the Corporate Documents list. The Corporate Documents list contains documents from many different data sources and are published by a large variety of people. To view the Corporate Documents list, click Corporate Documents on the navigation bar.
The number of documents in your list depends on your user rights and the amount of documents on the company’s server. There are several ways to organize the document list to make it easy for you to find the documents you need.

Let’s begin by looking at the types of documents available in the Corporate Documents list. We will then sort the list according to the author who published the document.

1. Click Corporate Documents on the navigation bar to access the Corporate Documents list.



Each document type is represented by an icon. Some of the icons you may encounter in the corporate document list are:

Icon	Document Type
	WEBINTELLIGENCE document
	BUSINESSOBJECTS document
	BUSINESSQUERY document
	Portable Document Format (PDF)
	Microsoft Word document
	Microsoft Excel spreadsheet
	Unrecognized document type
	Text (.txt) file
	Microsoft Power Point (.ppt) file

Refresh the Documents List

Let's make sure that the list of documents is up to date and displays all of the documents currently available to you in the repository.

To update the list of the documents in the repository:

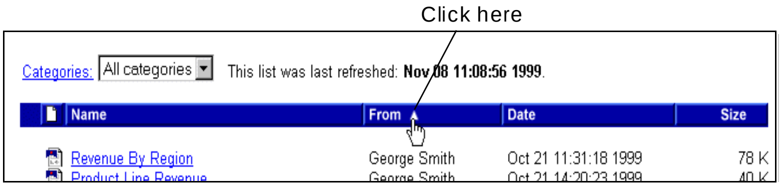
1. Click Corporate Documents on the navigation bar.
2. Click Refresh List in the menu bar at the top of the Document Results page. Today's date appears as the last refresh date for the list.

Note: This procedure does not refresh the documents in the repository, only the document list.

Sort the Documents List

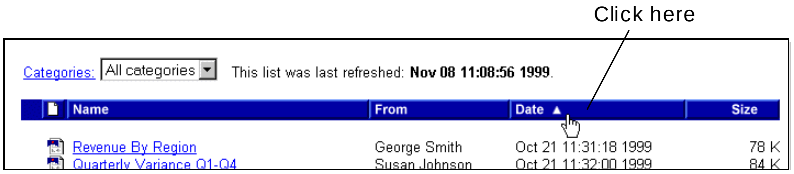
Now let's sort the list of documents in the database by author name.

1. Click From in the list menu bar.
The document list is sorted alphabetically by author name. The arrow that appears next to From indicates the direction of the sort. Your list looks similar to this:

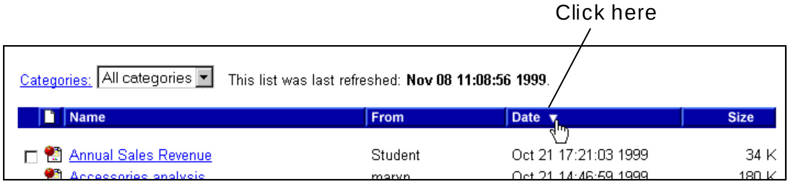


You might also be interested in viewing the document list by date so that you can quickly view the documents most recently added to the list. To do this:

2. Click Date in the list menu bar.
The list is sorted by date.



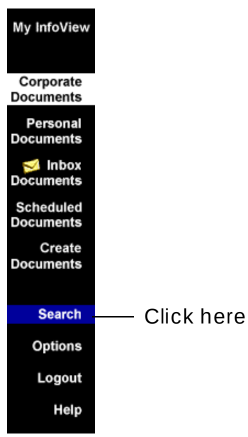
3. Click on the small white arrow next to Date.
The order of the list is reversed and the most recent documents now appear at the top of the list.



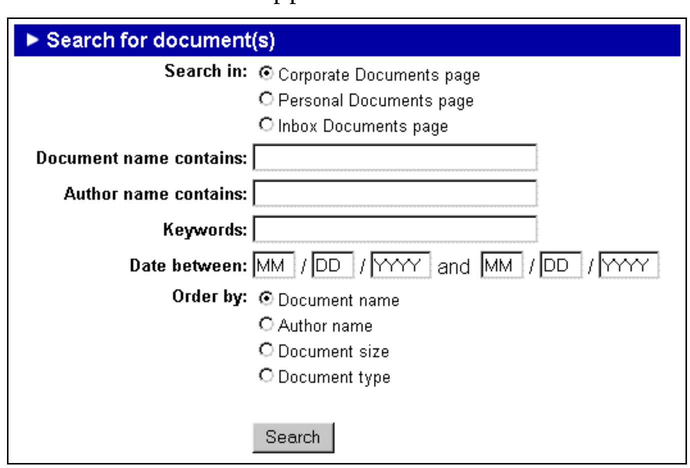
Search for a Document

You have sorted the list of documents, but you are still not able to find the exact document you are interested in. The search option allows you to retrieve a document based on a variety of criteria such as its name or author. You want to find a particular document created by the head of your department. To search for a document by author:

1. Click Search on the navigation bar.



The Search window appears.



2. Select Corporate Documents as the area to search in.
   Since you don't know the name of the file, but you do know who created the document, you are going to perform a search by Author name.

3. Enter the author name, for example, your manager's name, in the *Author name contains* text box.

4. Click Search.
   A list of documents published by your manager appears.

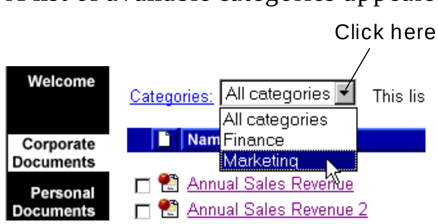
Breaking Down the Documents List by Category

Your document search by author name could bring up a long list of documents. To further narrow down the list you can view only the documents that belong in a specific category. Categories in the Corporate Documents list are created by your supervisor or other users who have the right to create categories. The categories you are able to view depend on your user rights.

For example, the document that you are interested in contains sales revenue figures, so you may look in the Finance or Sales category.

1. Click Corporate Documents.

2. Open the Categories list box.
   A list of available categories appears. Your list may look similar to this.



3. Choose a category.
   The result is a list of documents specific to the category. The category of a document is assigned when it is published to the Corporate Documents list.

Note: You may be able to create new categories in the Corporate Document list depending on your user profile.

You have found a document you are interested in, but how do you view it? The following steps explain how to best view your documents.

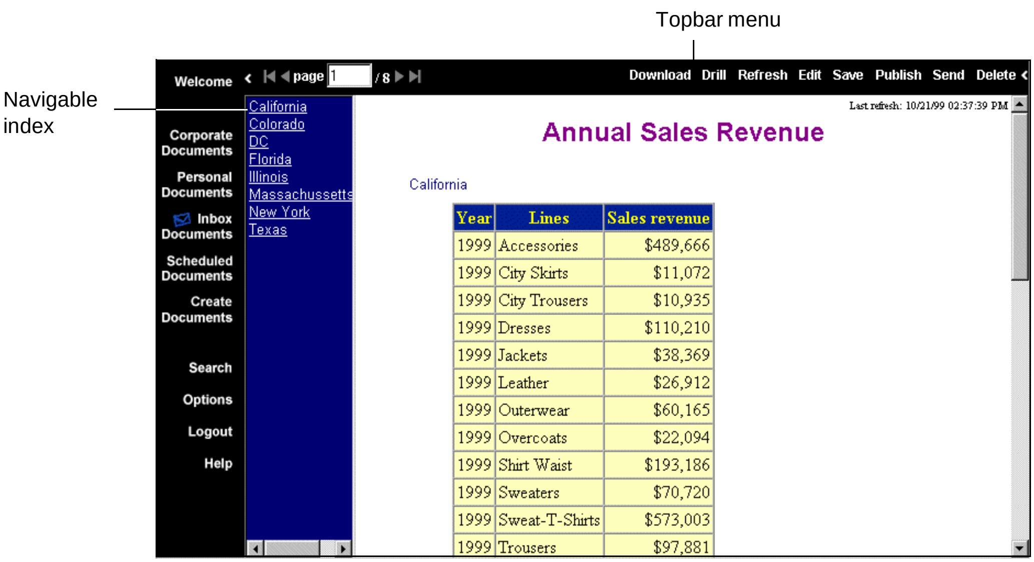
View a WebIntelligence Document

WEBINTELLIGENCE documents are just one of the many document types that you can view with INFOVIEW. When you open a document in INFOVIEW, the document is displayed in the document results page. The appearance of the this page depends on the type of document you are viewing and the editing options available to you.

To view a WEBINTELLIGENCE document in Personal Documents:

1. Click Personal Documents on the navigation bar.

2. Open the document, lesson3.
   This document contains a simple table of data for the sales revenue for each product line per state for the eFashion retail chain.



This document has a navigable index of section headings on the left of the document page. It allows you to easily locate the information you need without having to scroll through all of the data in the document. The topbar menu contains options for editing the open document.

Let's view the data for a few different states using the navigable index.

- Click on the state name on the navigable index to view its data.

Refresh the Data and Save the Document

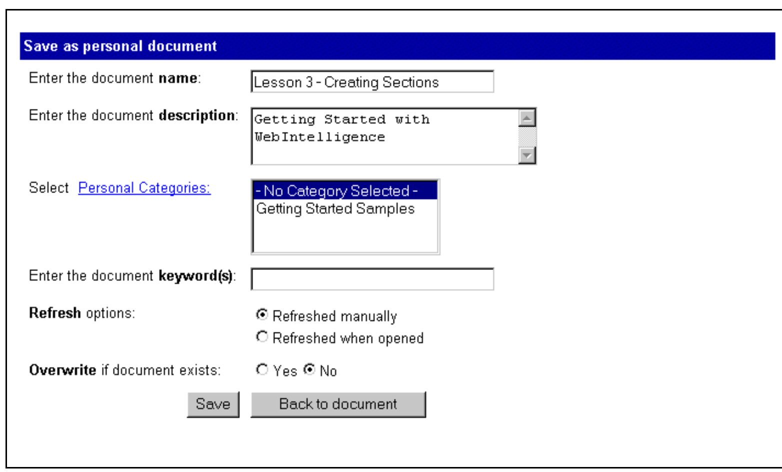
Because this document was created several weeks ago, it shows the figures that existed at that time. You want to make sure that you are viewing the most recent figures. You can update the data the document, yet keep the same formatting. This is known as refreshing.

Let's refresh the and save the document to the Personal Documents list.

1. Click Refresh in the menu of the Document Results page.

The data in the document refreshes and displays the current information.

2. Click Save in the menu of the Document Results page.
The Save page appears.



3. Enter a new name for the document in the *Enter the document name* field.
For example, Sales Revenue by State.

4. Enter a new description for the document.
For example, Sales revenue for all product lines, years 1999-2001, for all states.
The description appears when you display the document list in expanded mode.

5. Select a category for the document.
You create the categories in the Personal Categories list. To learn how to create a new category, refer to "Create a Personal Category" on page 60.

6. If you want, enter one or more keywords to serve as search criteria for this document.
7. Select a refresh option.
   - *Refresh manually* **-** allows you to choose when to refresh the document.
   - *Refresh when opened* **-** The document is refreshed automatically every time you open it.
8. If you want this version of the document to overwrite any previous versions of this document with the same name, select Yes for the option, *Overwrite if document exists*.
9. Click Save.
   A message appears at the bottom of the page confirming that the document has successfully been saved to your Personal Documents list.

Analyze a WebIntelligence IDocument with Prompts

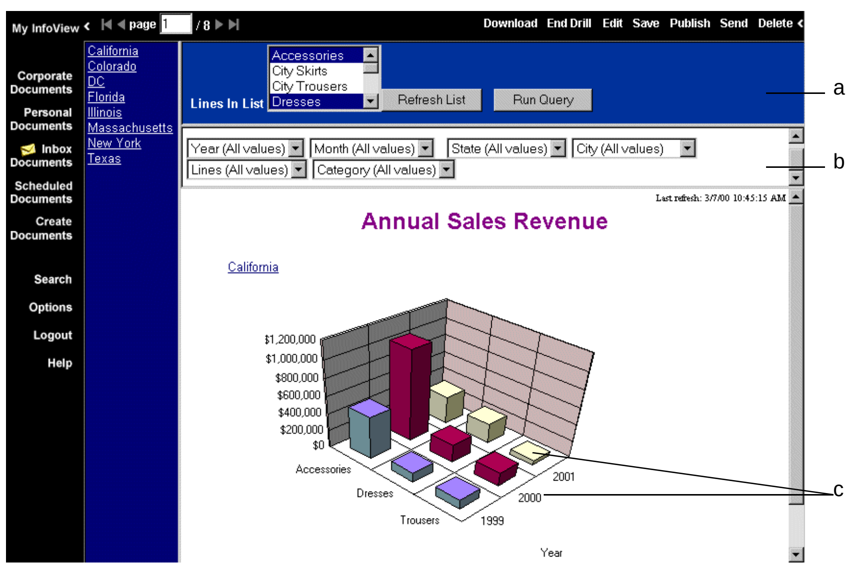
The document that you opened in the previous section was a very simple table, but WEBINTELLIGENCE documents can also be very complex.

The next document you will view contains several layers of data within it that you can access by drilling down into the data. This allows you to analyze specific pieces of information.

View the Document Using Prompts

1. Click Personal Documents.

2. Open the document, lesson1.
This document contains a prompt for the product line and is drillable.



a. Prompt for Lines
b. Drill prompts appear within the document
c. Objects are drillable from the chart axis or on the chart

You have noticed that the sales revenue for accessories dropped drastically from the year 2000 to 2001. Let's see if we can find out why.

You need to find out where the drop in revenue occurred. To keep the chart to a manageable size, let's view three products at a time. Let's assume that you are interested in viewing the results only for Accessories, Outerwear, and Sweaters.

1. Hold down the CTRL key and select Accessories, Outerwear, and Sweaters from the *Lines in List* menu.

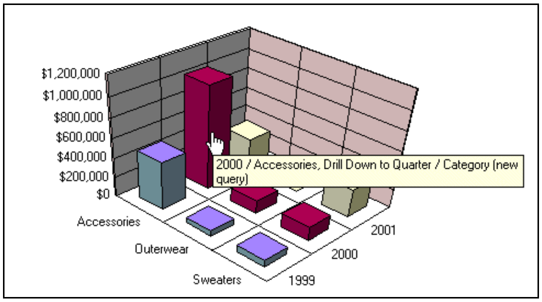
2. Click Run Query.
The chart displays only the Lines you have chosen.

Analyze the Information

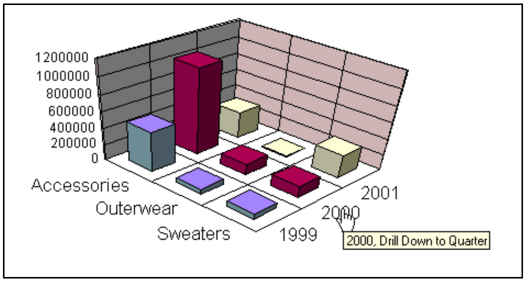
Now let's begin analyzing the data to see if we can find the source of the problem. There has been a steep decline in accessory revenue from 2000 to 2001, so let's look at that line more closely.

Here are a few different ways you can drill on a WEBINTELLIGENCE document.

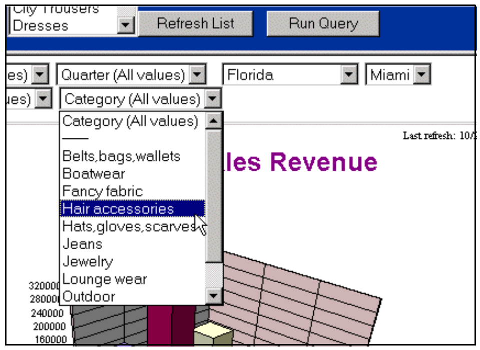
- If you move your cursor over the bar for accessories in 2000, you see that the next level of detail is Quarter and Category.



- If you want to drill down on one element at a time, the titles of the chart are also drillable. For example, if you want to view the year 2000 by quarter, you can click 2000 on the chart axis.

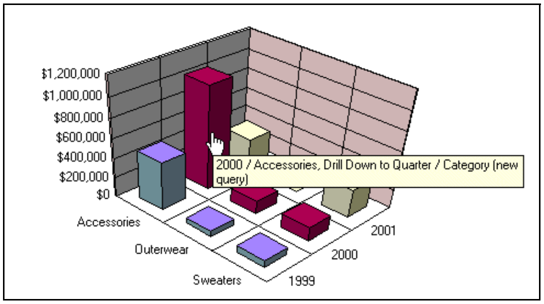


- You can select a specific level of detail from the drop-down lists in the document. For example, if you want to view only one specific category in the Accessories product line, Hair accessories.

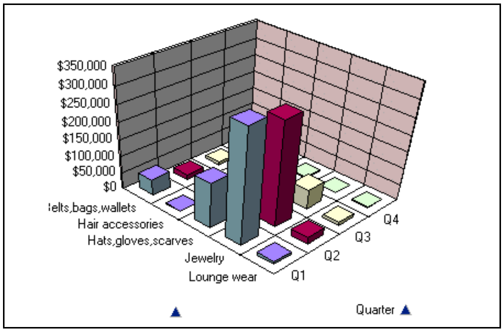


To analyze the document

1. Click on the bar for accessories in 2000.



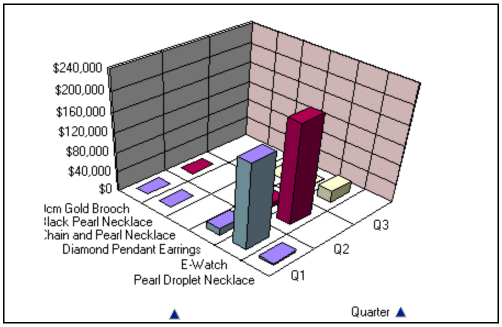
The result is a chart of sales revenue for the different categories of accessories for each quarter of 2000.



There is a sharp drop in the jewelry category from Q2 to Q3. Let's find out why.

2. Click Jewelry on the chart axis.

3. The items in the Jewelry category appear on the chart.



The E-Watch is clearly the problem. Sales for the E-watch declined sharply after Q2. The person in charge of this product line needs to have this information; the next steps show you how to send the document.

Note: For information about how to create drillable documents, refer to “Make the Chart Drillable” on page 124, or you can also refer to the *WebIntelligence User’s Guide* in the WebIntelligence On-Line User’s help.

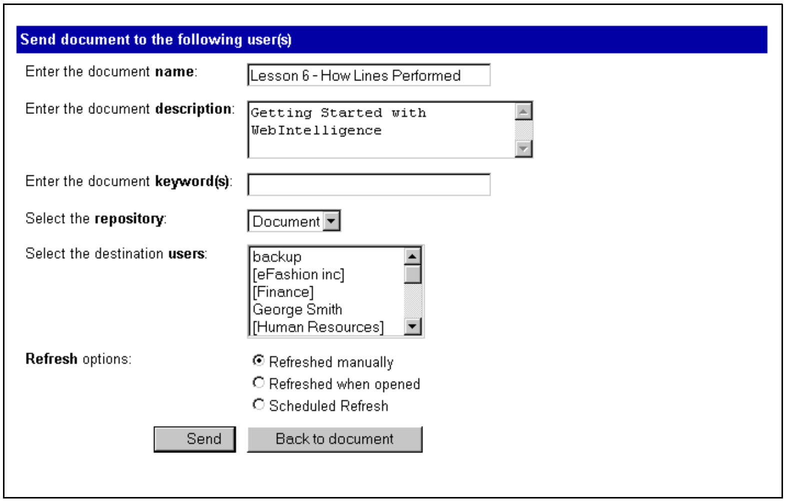
Send the Document to Another User

There are a few different ways to make a document available to other users in your company. You can publish the document to the corporate list or you can send it to a specific user or user group.

Let's send the results of this analysis to the product manager in charge of this line. Perhaps he can provide an explanation for the drop in sales.

To send the document:

1. Click send in the top menu bar.
   The Send page appears.



2. Enter a name for the document in the *Enter the document name* field.

3. Enter a document description.

4. From *Select the destination users* list, select Student.
   For the purpose of this tutorial you will send the document to yourself, Student.

5. Click Send.
   The message "Document successfully sent" appears at the bottom of the page.

Retrieving a Document from Your Inbox

Let's retrieve the document that you just sent to Student. To retrieve the document:

1. Click Inbox Documents.
The Inbox Documents list appears.

Since you were logged into INFOVIEW when you received the document it does not appear in your Inbox Documents immediately. You need to refresh the list for the document to appear in the Inbox.

2. Click Refresh list from the menu.
The document you sent appears in the list. All unread documents appear with an envelope beside them.

New Message Icon

Retrieving documents received while logged out

It is very clear when you log into INFOVIEW if you have new documents in your Inbox or not. The Inbox Documents icon on the navigation bar appears with a yellow envelope if you have new documents, or a blue outline of an envelope if there are no new documents. The following table shows how the icon changes.

No new documents in your Inbox	New documents in your Inbox
	

View a BusinessObjects Document

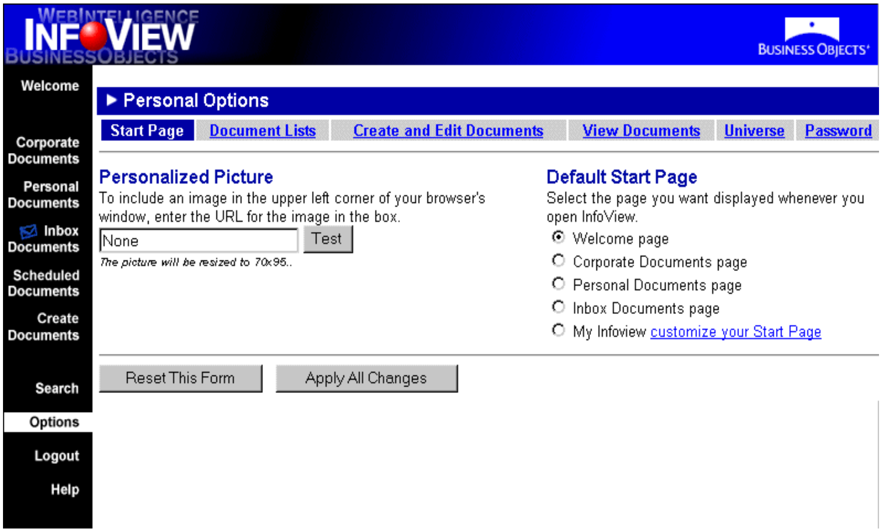
Some people in your company may use BUSINESSOBJECTS to create reports and publish them to the Corporate Documents. You can view these reports with INFOVIEW. To do this you have three options for viewing the document: Standard HTML, Enhanced document format, or PDF. For information on viewing BUSINESSOBJECTS documents in Enhanced document format, refer to the *InfoView User's Guide*.

Let's view a document in Standard HTML format.

Selecting a Viewing Option

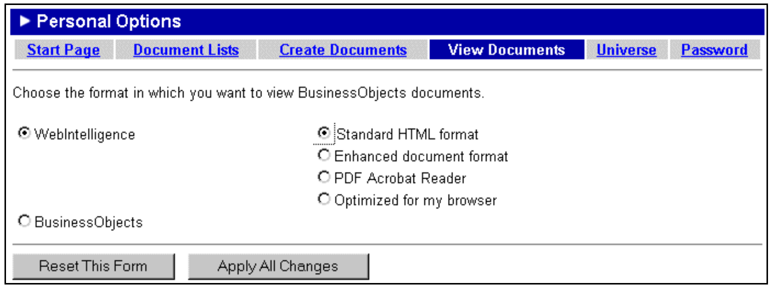
First, let's select the HTML viewing option.

1. Select Options from the navigation bar.
The INFOVIEW options window appears. For detailed descriptions of all of the INFOVIEW options, refer to the *InfoView User's Guide,* "Customizing Your InfoView Account".



2. Click the View Documents link.

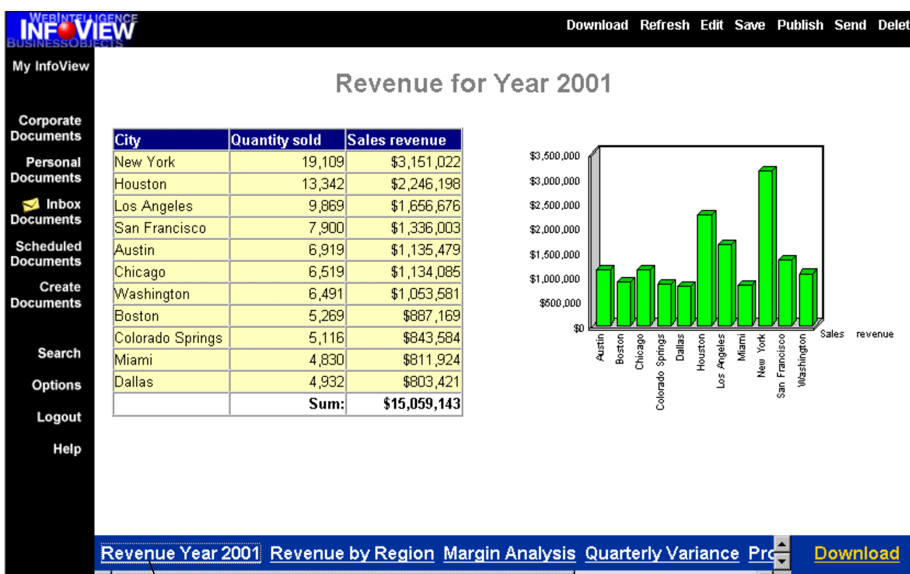
3. Select to view BUSINESSOBJECTS documents with WEBINTELLIGENCE, and select *Standard HTML format* from the format options.



4. Click Apply All Changes.

Now that you've set the correct options, you can open the document and view it in HTML format.

1. Click Corporate Documents on the navigation bar.
2. Click the BUSINESSOBJECTS document, Efashion.
   The document opens in Standard HTML format. The BUSINESSOBJECTS document you open contains several related reports.



City	Quantity sold	Sales revenue
New York	19,109	$3,151,022
Houston	13,342	$2,246,198
Los Angeles	9,869	$1,656,676
San Francisco	7,900	$1,336,003
Austin	6,919	$1,135,479
Chicago	6,519	$1,134,085
Washington	6,491	$1,053,581
Boston	5,269	$887,169
Colorado Springs	5,116	$843,584
Miami	4,830	$811,924
Dallas	4,932	$803,421
	Sum:	$15,059,143

These are the report titles of the document.

3. Click the report titles to view the different reports in the document.

Publish Your Document For Other Users

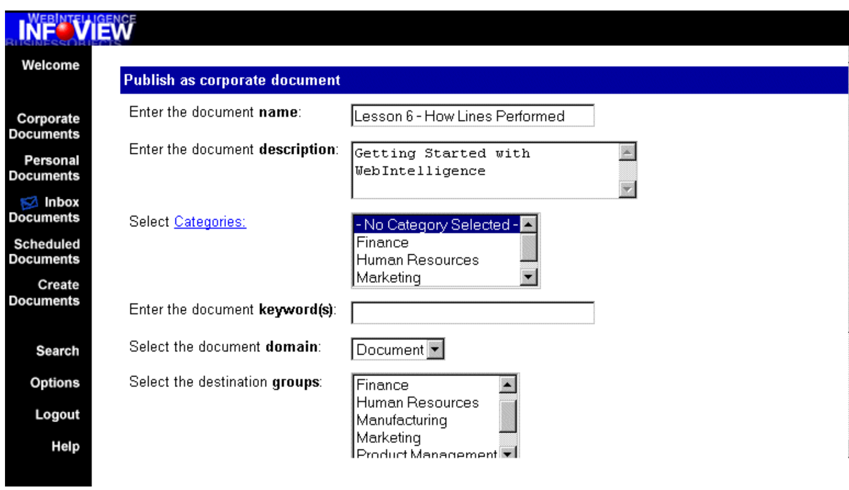
For the sake of this tutorial, let's assume this BUSINESSOBJECTS document highlighting the sales revenue for eFashion was published to the Finance category of the eFashion Corporate Documents list, however you think that Marketing might be interested in the document as well. To make the document available to this department, you will publish the document to the marketing category in the Corporate Documents list.

To publish the document:

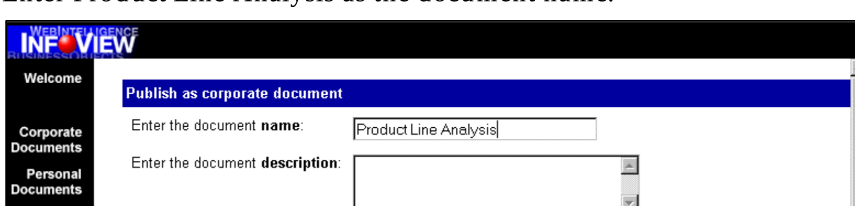
1. If you closed the BUSINESSOBJECTS document from the previous steps, open the document, Efashion, in the Corporate Documents list.

2. Click Publish in the top menu bar of the Document Results page.

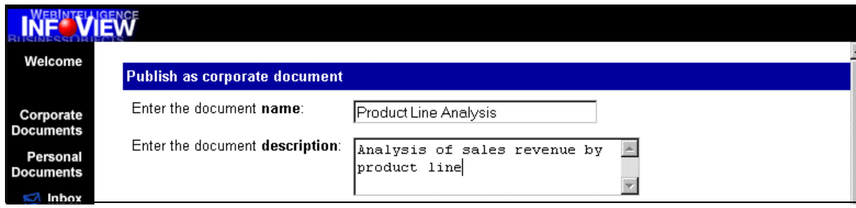
The *Publish as corporate document* page appears.



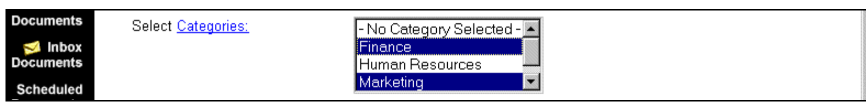
3. Enter Product Line Analysis as the document name.



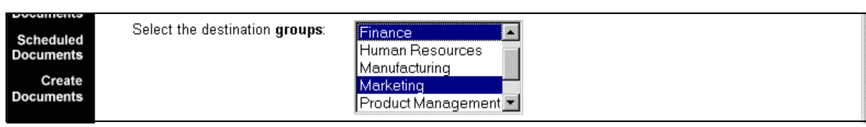
4. Enter a description of the document in the Document Description field. This description appears when you view the document list in expanded format.



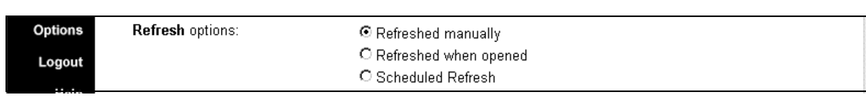
5. Select a category from the list of available categories.
If you were actually working for eFashion, your categories list might look like this, and you could select Marketing from the list of categories.



6. Select one or more user groups from the list of destination groups.
Only users in the group or groups you select from this list will have access to this document in the repository. The groups are created by the systems administrator. Your list may look similar to this:



7. Select a refresh option. For Example, selecting Refresh Manually from the list of refresh options allows the user to decide when they want to refresh the document.



8. Select an overwrite option. Selecting Yes from the *Overwrite if document exists* options allows you to save over the document previously saved under the same name.
If you do not want to overwrite the document, select No. You may have to change the document name to save it.

9. Click Publish.
The message *Document successfully published* appears.

Now everyone with access to Marketing and Finance documents at eFashion can view this document.

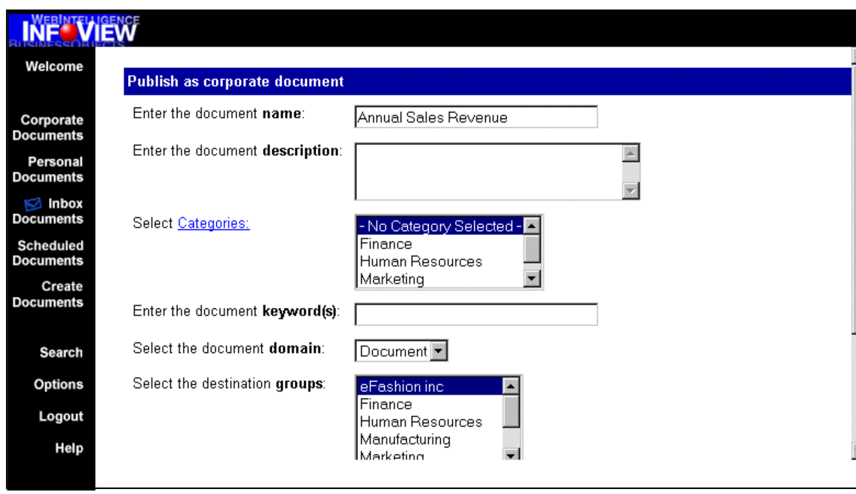
Refresh a Document Weekly

The document you just published contains sales revenue data that changes daily. You want to publish an updated version of this document every Monday morning. You can set up the scheduling option to do this for you automatically so that every Monday morning the updated document appears in your Inbox in INFOVIEW. You can schedule a document only if a BROADCAST AGENT has been installed on your server. If you do not have access to BROADCAST AGENT, contact your systems administrator.

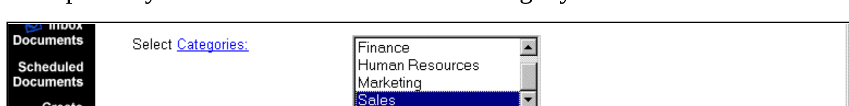
To schedule a document:

1. Open the sample document, lesson6.

2. Click Publish in the top menu bar of the Document Results page. The Publish as corporate document page appears.

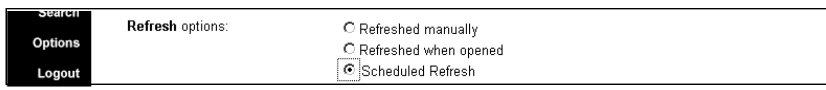


3. Select a category, for example Sales, from the list of available categories. This places your document in the Sales category.

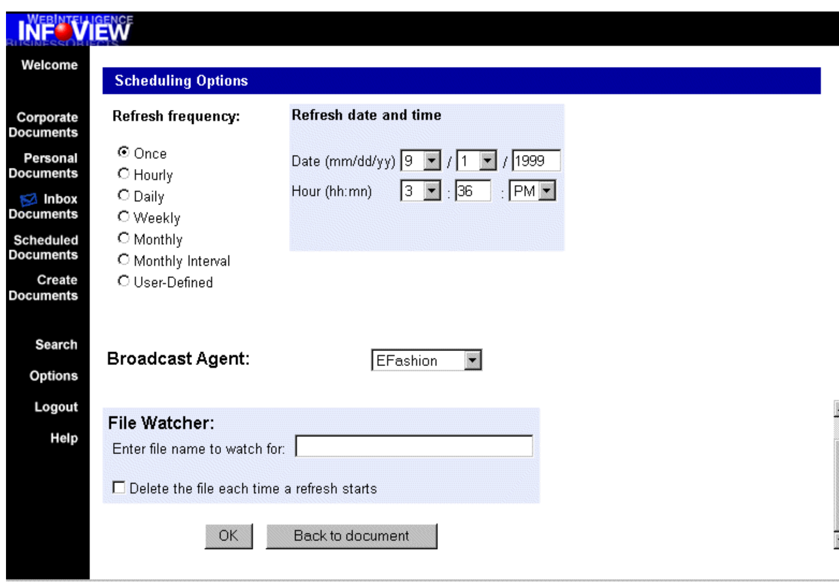


4. Select one or more user groups from the list of destination groups.
   Only users in the group or groups you select from this list will have access to this document in the repository. The groups are created by the systems administrator. Your list may look similar to this:

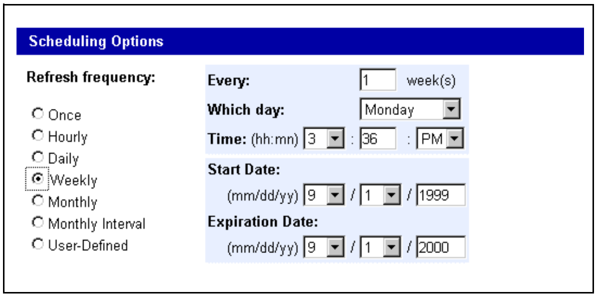
5. From the Refresh options select Scheduled Refresh.
   You may have to scroll down to view these options.



6. Click Publish.
   The Scheduling Options page appears.



7. From the Refresh Frequency options, select Weekly, as shown:



8. Select the following options:
   - Every - 1 week
   - Which day - Monday
   - Time - 8:00 AM
   - Start Date - Keep the default setting of today’s date.
   - Expiration Date - Enter one month from today’s date.

9. Click OK.
   The refreshed version of the document will appear in your Inbox on Monday morning at 8:00AM.

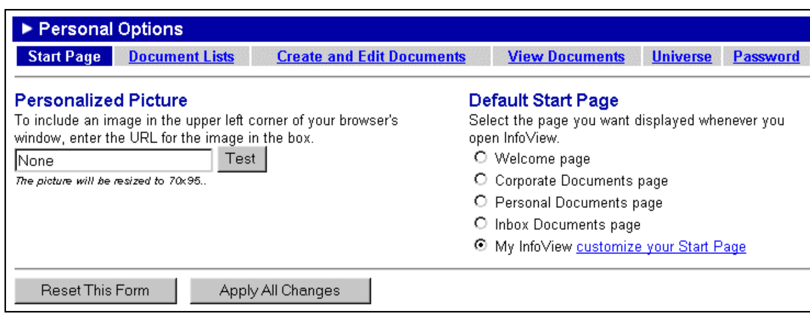
Customize the My InfoView Start Page

You have learned how to access all of the information stored in your corporate database, but it is also important that you are able to access the information that you need most in a quick and efficient manner.

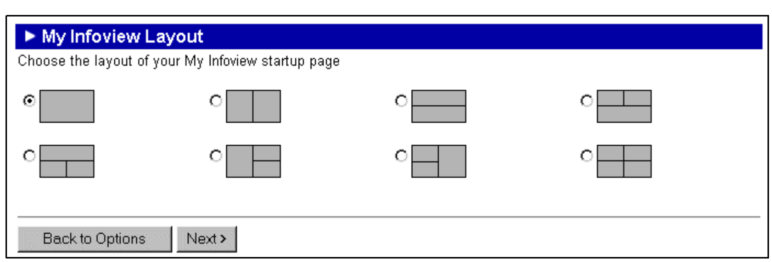
Each morning when you begin working, you review a BUSINESSOBJECTS document with the sales figures for the previous day, you check a website to view how your company performed on the stock market, and you check your INFOVIEW Inbox Documents for new documents. You can set up your My InfoView window to show you all of these things in one browser window.

To configure MyInfoView with three separate panes:

1. Click Options on the navigation bar.
The Personal Options page appears.

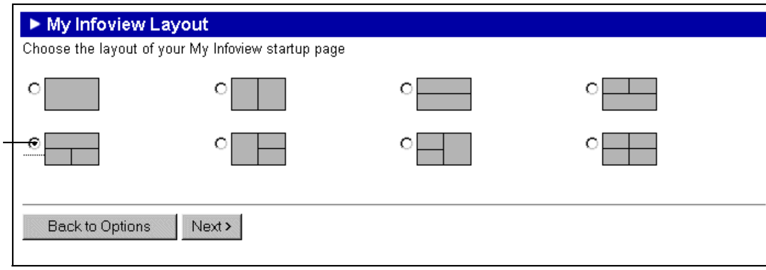


2. Select My InfoView from the Default Start Page options and click the *Customize your Start Page* link.
The My InfoView layout options appear.

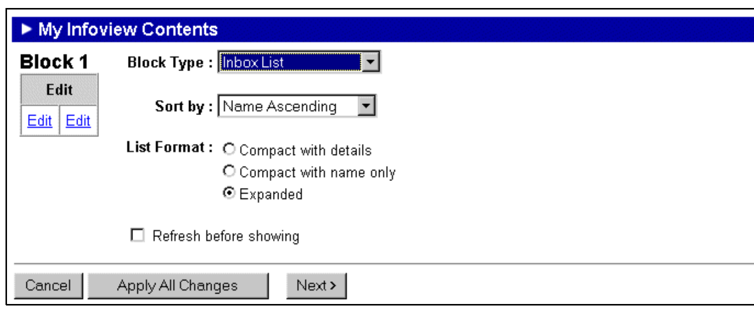


3. Select the three pane option with the large pane on top.

Three pane options

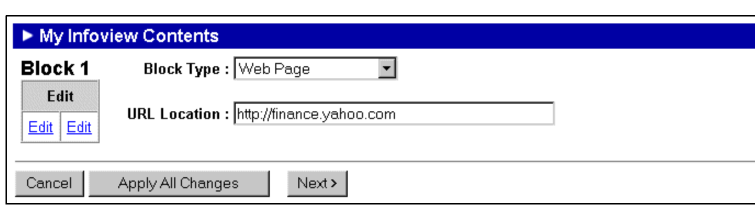


4. Click Next.
The block one options appear.



5. To display a Web Page in this pane, select the following options.
- Block Type - Web Page
- URL location - Enter the URL for your favorite financial website, for example, http://finance.yahoo.com/

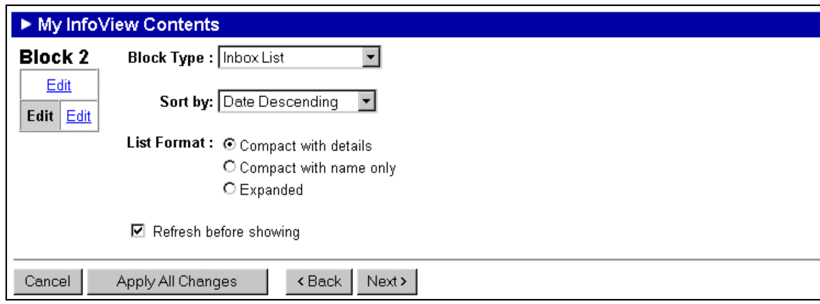
Your block one options should look like this:



6. Click Next and select the following options to display your Inbox Documents list in block two:
- Block Type - Inbox List
- Sort by - Date descending (the most recent documents will appear at the top of the list)
- List format - Compact with details

- Refresh before showing - check this box to refresh the list each time you display the My InfoView window.

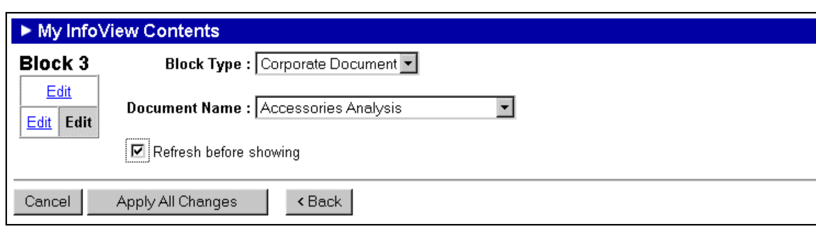
Your block two options should look like this:



7. Click Next and select the following options to display a document from the Corporate list in block three:

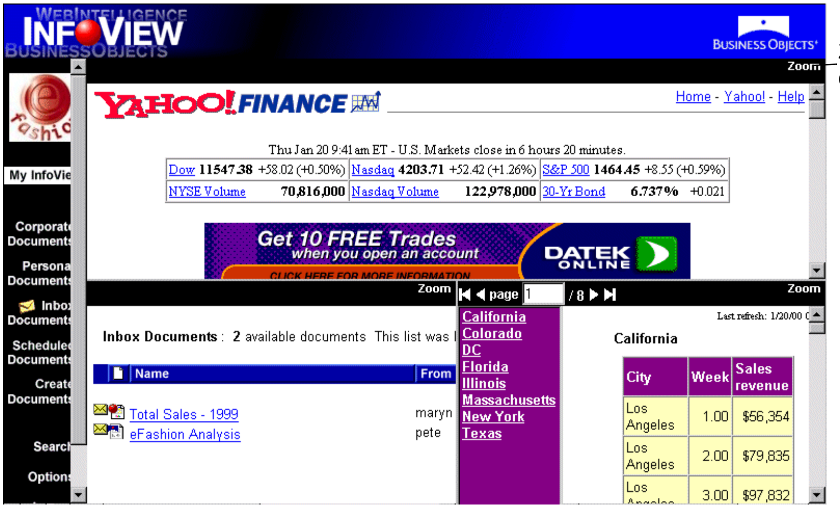
- Block Type - Corporate document
- Document name - select a document from the drop down list.
- Refresh before showing - check this box to refresh the document each time you display the My InfoView window.

Your block two options should look similar to this:



8. Click Apply All Changes.

9. Click My InfoView on the navigation bar to view the results.
Your My InfoView should look similar to this:



Zoom option

Tip: Click Zoom in the top right corner of the pane to view the contents of that pane at full screen size. Click your browser's Back button or My InfoView in the navigation bar to return to My InfoView.

Now that you've learned to manage existing documents, let's learn how to create WEBINTELLIGENCE documents. With the student login, you are able to create documents with the eFashion database because the Create Documents option is visible on the navigation bar.
If it is not visible, your user profile may not allow you to create documents using WEBINTELLIGENCE. Contact your systems administrator for further information.

Lesson 2

How Much Revenue Did My Stores Generate This Year?

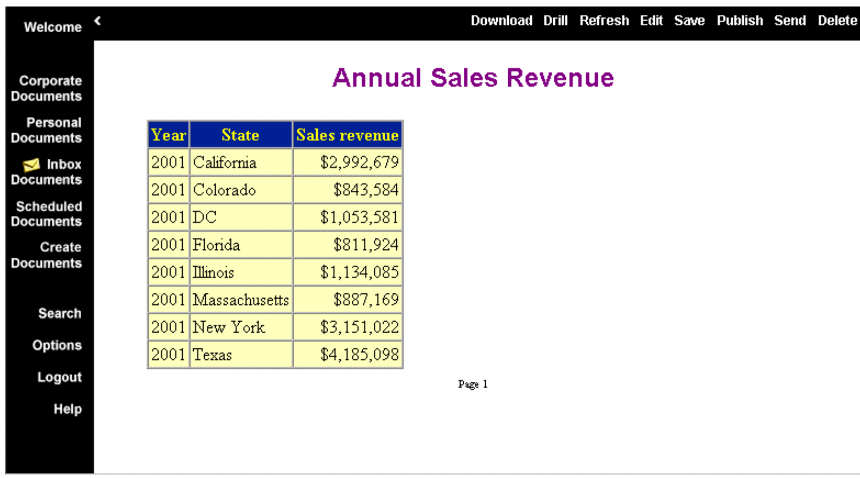
In this lesson

- **Business question**
  How much revenue did my store generate this year?
- **Learning objective**
  Learn how to create a simple query and build a WEBINTELLIGENCE document using data from the corporate database.
- **Time**
  10 minutes
- **Finished report**
  lesson2

Objective

You are responsible for two eFashion stores in California, and you want to know how the revenue for your store compares with other stores in the chain. First, you need to get the total sales revenue for all eFashion stores for this year, 2001, from the corporate database using WEBINTELLIGENCE.

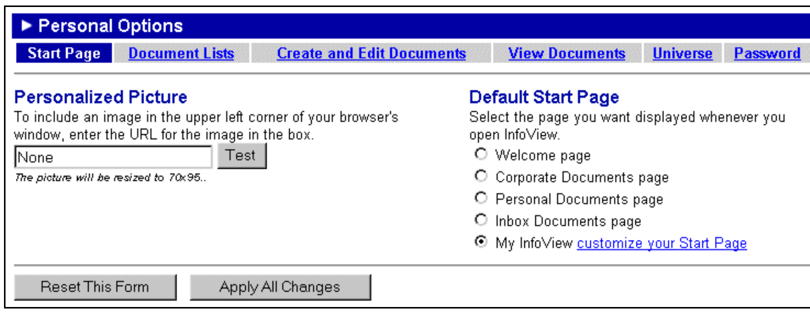
This lesson takes you through all the steps for creating a simple table of data. The document you create in this lesson will look like this:



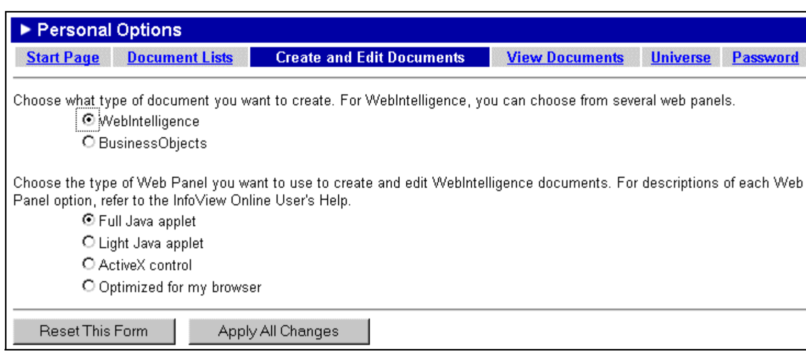
Before You Begin

The appearance of WEBINTELLIGENCE may vary depending on the browser you use and options you choose. To be able to follow this tutorial, you need to check that one option has been correctly set. Here's what to do:

1. Click Options on the navigation bar.
   The Personal Options page appears:



2. Click the Create and Edit Documents tab.



3. From the WEBINTELLIGENCE Documentation Editor options, select Full Java applet.

4. Click Apply Changes.

Note: If you do not have the ability to change the WEBINTELLIGENCE Document Editor options, ask your systems administrator for assistance.

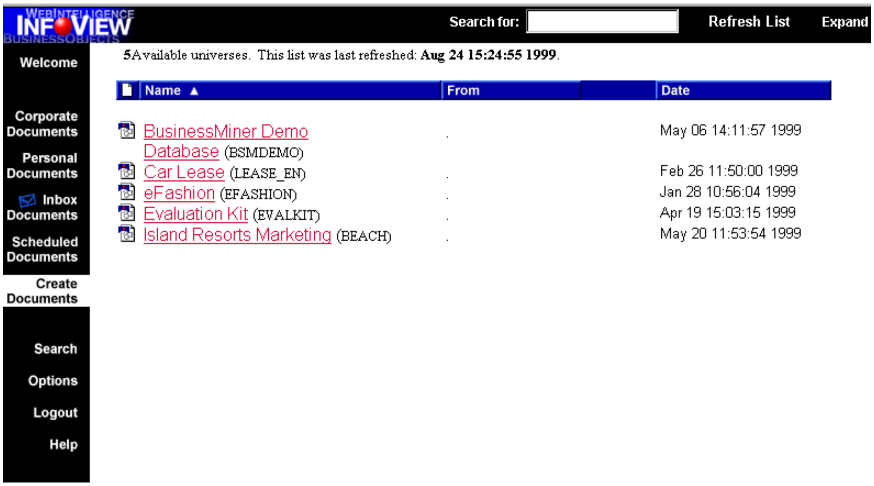
Get the Data You Need

WEBINTELLIGENCE makes accessing data from your corporate database easy through a semantic layer called a “universe” which presents data in everyday business terms.

Universes are made up of *classes* and *objects*. For example, the objects in a human resources universe would be Names, Addresses, Salaries, etc. Classes are logical groupings of objects. Each class has a meaningful name, such as Vacation (for objects pertaining to employees’ vacations). Each object maps to data in the database, and enables you to retrieve data for your reports.

To begin creating your first WEBINTELLIGENCE document:

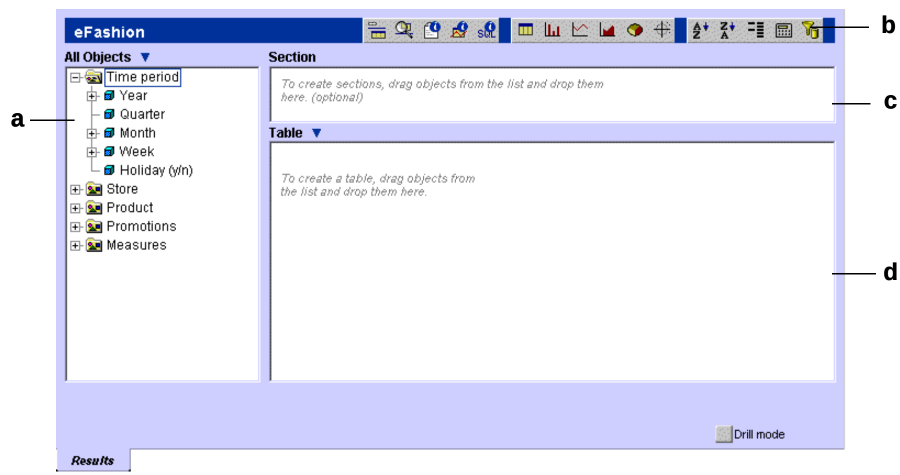
1. Click Create Documents.
A list of available universes appears.



2. Click eFashion.
The Web Panel appears. This is where you build, edit, and format a WEBINTELLIGENCE document.

Note: If this is the first time you are logging into WEBINTELLIGENCE, a security dialog box may appear. Click Yes to accept the applet. If eFashion is not in the list, see your systems administrator for assistance.

You will be using the Full Java Web Panel which looks like this:



a. Classes and Objects Panel - This is the data available in your database. It is organized in folders.

b. WebPanel toolbar - Buttons for quick formatting and query building.

c. Section Panel - This is where you put the data you want to use as section headings.

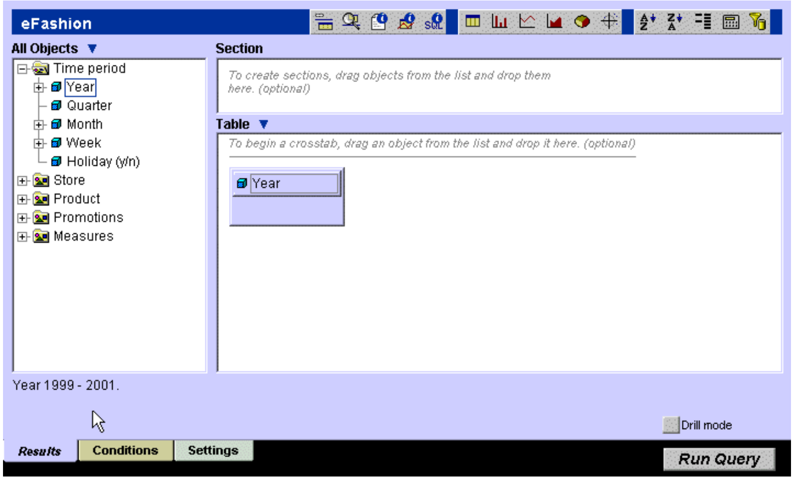
d. Block Panel - This is where you put the data you want in your document and choose the way you want to display the information. A block is a generic term used to describe tables, cross-tabs, and charts.

Note: For descriptions of the Light Java applet and ActiveX controls Web Panels, refer to the *WebIntelligence User's Guide.*

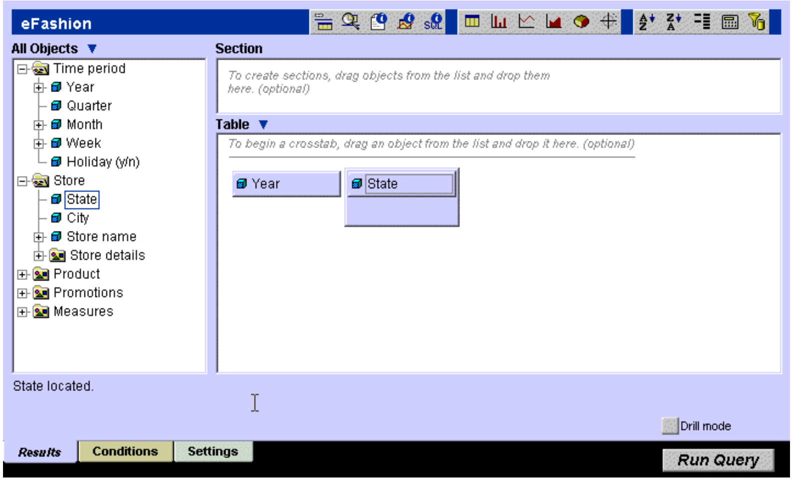
Now that you have selected the eFashion universe, you are ready to select the data you need from the Web Panel to build your query. Let's begin by retrieving the sales revenue data for all years and all eFashion stores.

To add your data:

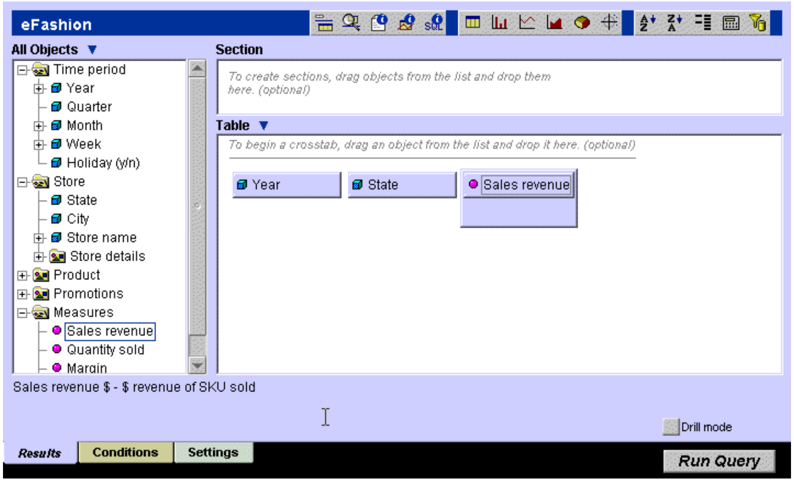
5. Open the Time Period folder and double-click Year.
Year is added to the Table area, also called the Block Panel.



6. Open the Store folder and double click State.
State is added to the Table area.



7. Open the Measures folder and double-click Sales Revenue.



8. Click Run Query to view the results.

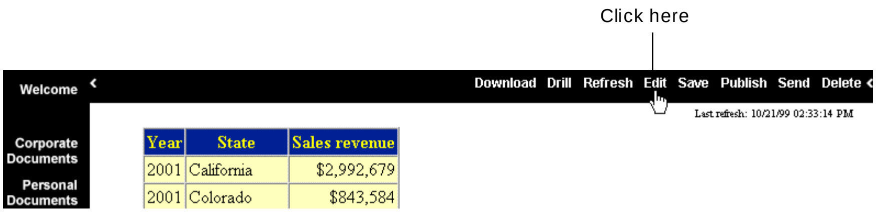
View Revenue for the Current Year Only

Your document shows the sales revenue for the last three years, but you are interested in viewing the data only for the current year. To limit the information in the document, you need to apply a condition to the query, so that only the data for this year is displayed.

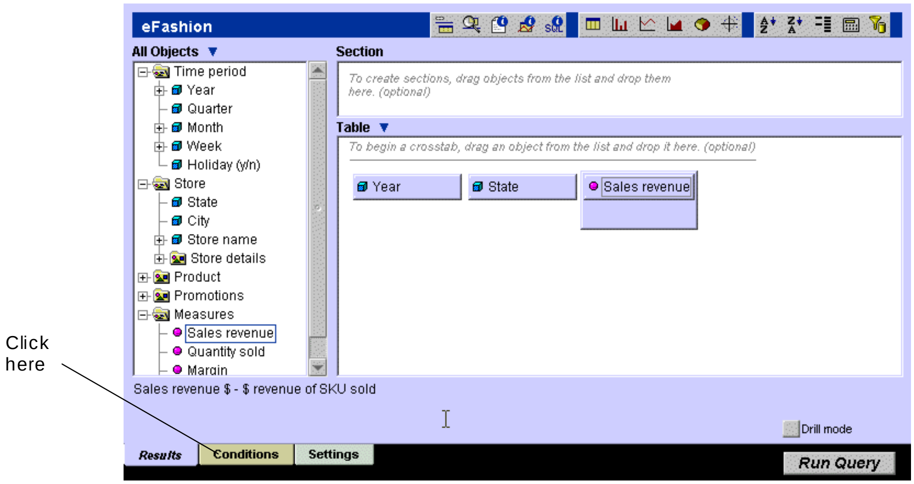
There are two types of conditions: pre-defined and custom. eFashion has several pre-defined conditions available. Let's begin by learning how to apply a pre-defined condition. You will learn how to create a custom condition in a later lesson.

To apply a pre-defined condition:

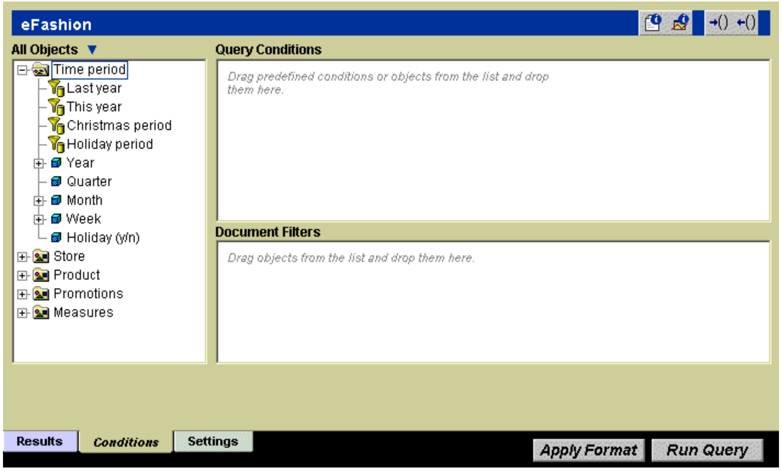
1. Click Edit to return to the Web Panel.



2. Click the Conditions tab.



The Conditions Panel appears.



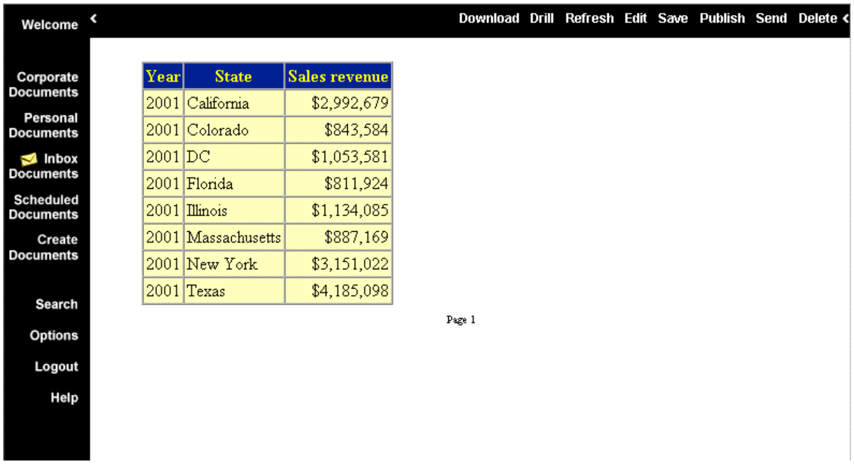
3. Double-click the pre-defined condition, This Year, in the Objects Panel. The This Year condition appears in the Query Conditions Panel.

4. Click Run Query.
   The data in the table now displays only the figures for this year, 2001.

View the Results

You have created a document that shows the annual revenue of eFashion for each state. Your data is displayed in a table using the default colors and type styles. This document is an HTML file that you can view from any browser.

This is what your document looks like:



Year	State	Sales revenue
2001	California	$2,992,679
2001	Colorado	$843,584
2001	DC	$1,053,581
2001	Florida	$811,924
2001	Illinois	$1,134,085
2001	Massachusetts	$887,169
2001	New York	$3,151,022
2001	Texas	$4,185,098

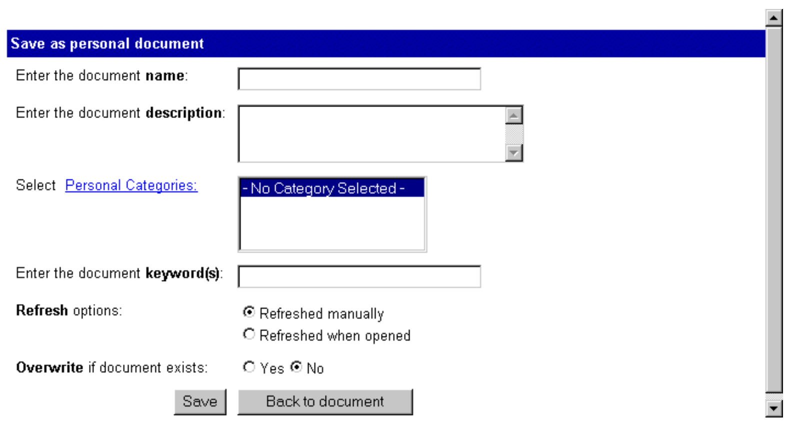
Notice how the data in the table appears in the same order as it is placed in the Web Panel.

Save the Document

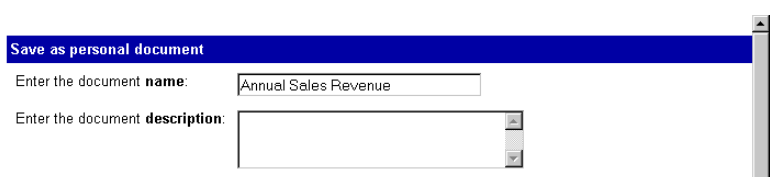
Now, you are going to save your document to your Personal Documents. Personal Documents are available only to you. To enable other users to view your document, you must either send it to a particular user or group, publish it to the shared Corporate Documents. You will learn how to publish documents later in this chapter.

To save your document:

1. Click Save.
The Save as personal document page appears.

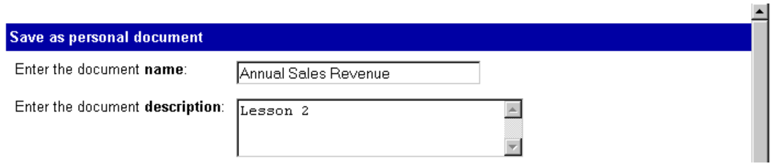


2. Enter the document title, Annual Sales Revenue, in the *Enter a document name* text box.



Note: Because there could eventually be very many documents in the Corporate and Personal Documents lists, it is very important to give the document a meaningful name that describes its contents.

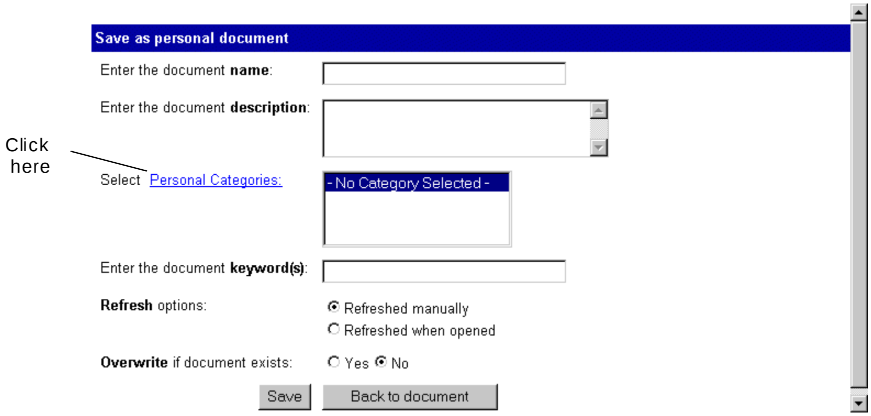
3. Enter a description of the document in the field.
For example: Sales revenue for all states in years 1999-2001. The document description appears when you view the Corporate or Personal Documents lists in expanded format.



Create a Personal Category

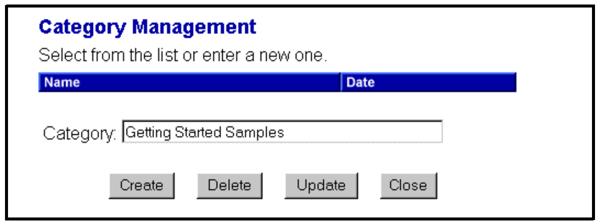
You can create categories in your personal documents to organize your Personal Documents just as you would in the Corporate Documents list. Categories make organizing and finding documents simple. Personal categories are not related to the categories in the Corporate Documents list.

1. Click the Personal Categories hyperlink.



The Category Management window appears.

2. Enter Getting Started Samples in the Category field.



3. Click Create.
The new category appears in the list.

4. Click Close to return to the Save page.
5. Select Getting Started Samples from the category list in the Save page.
6. If you want, enter one or more keywords to serve as search criteria for this document.
7. Click Save.
The document is saved to the Getting Started Samples category in your personal documents list.
8. Click Back to document.
In the next section you begin formatting the document.

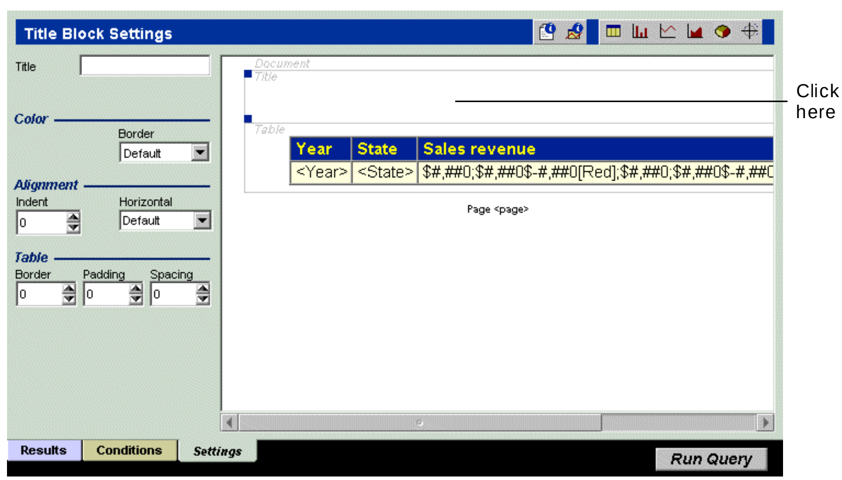
Add a Title to the Document

Now that you have retrieved the necessary information from the database, you are ready to work on how the data is presented. eFashion has some corporate guidelines that you must follow if you intend to share this document with others in the company. Let's start by adding a title to the document.

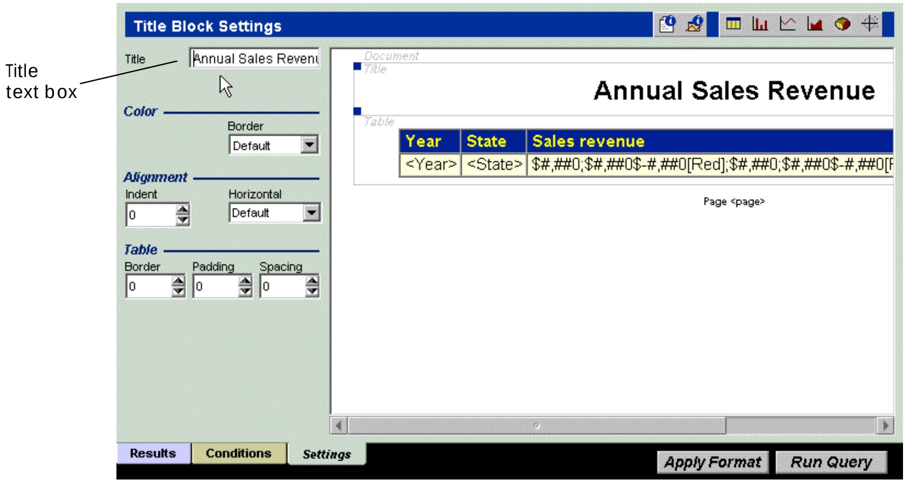
1. Click Edit to return to the Web Panel.

2. Click the Settings tab.

3. Click inside the Title area.
The Title Block Settings appear.

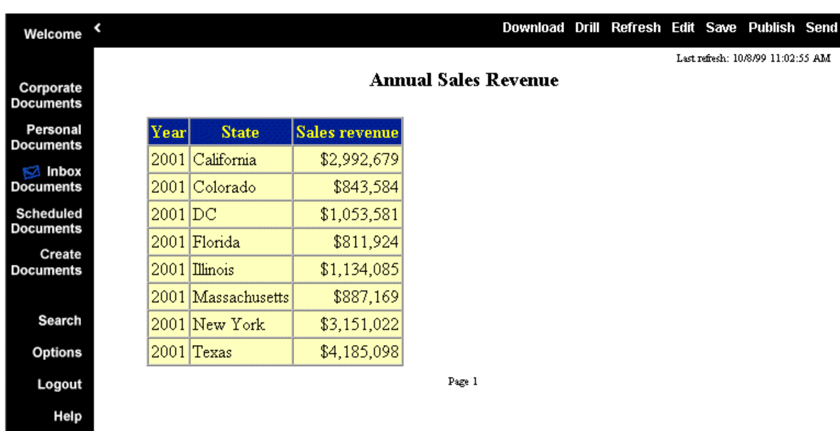


4. Click in the Title text box and type Annual Sales Revenue in the field.



Note: If this is the first time that you are creating a document in WEBINTELLIGENCE, the title you enter in the Title text box may not appear in the Title area of the Settings tab until after you Apply Format.

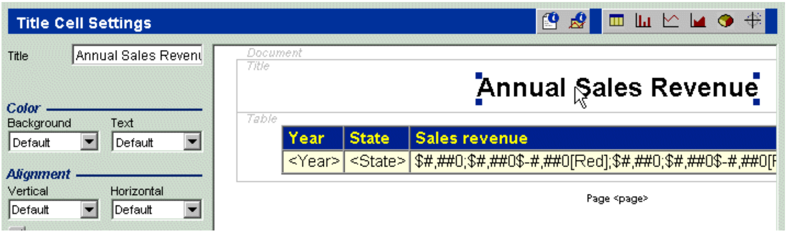
5. Click Apply Format to view the result.



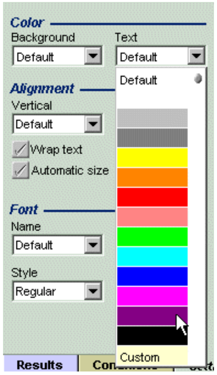
Format the Title

You are now ready to apply some colors to the document. eFashion has a standard selection of corporate colors and font styles for formatting company documents. You are going to format the title to comply with these corporate standards.

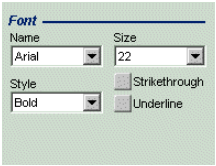
1. Click Edit to return to the Web Panel.
2. Click the Settings Tab.
3. Click on the title in the Title area.



4. From the Color section of the format options, Choose Violet from the Text menu.



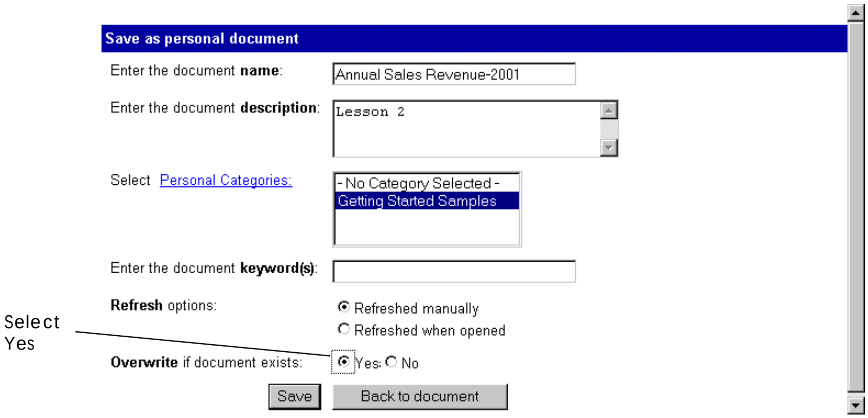
5. From the Font options, select the following:
    - For Name, select Arial
    - For Size, select 22pt
    - For Style, select Bold



6. Click Apply Format.

7. Click Save.
   The save page appears.

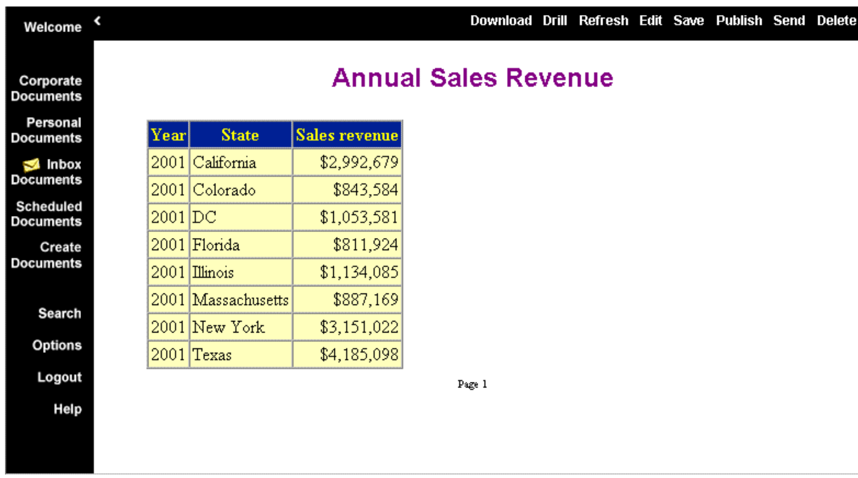
8. Select Yes, for the option *Overwrite if document exists.*



9. Click Save.
   This overwrites the first version you saved previously in this lesson. For this tutorial you save one document per lesson.

The Finished Document

You've just created your first WEBINTELLIGENCE document! Notice that both New York and Texas generated more revenue than your stores in California. In the following lesson you add more detail to your document to help you analyze the information more closely to find out why those stores performed better than yours.



Lesson 3

How Can I View the Data for Only My State?

In this lesson

- **Business question**
  How can I view the data for only my state?
- **Learning objective**
  Add new data to a document, limit the data displayed in the table, and format the document using corporate standards.
- **Time**
  10 minutes
- **Finished report**
  lesson3

Objective

In Lesson 2, "How Much Revenue Did My Stores Generate This Year?" on page 49, you created a high-level document showing this year's sales revenue for each state. Now you would like to view the data for the last three years so that you can make a comparison. You also want a more detailed view of how the performance of different product lines affected sales revenue. To do this you need to add new information to your query.

This lesson also shows you how to format documents containing a lot of data so that different users can go directly to the information of interest.

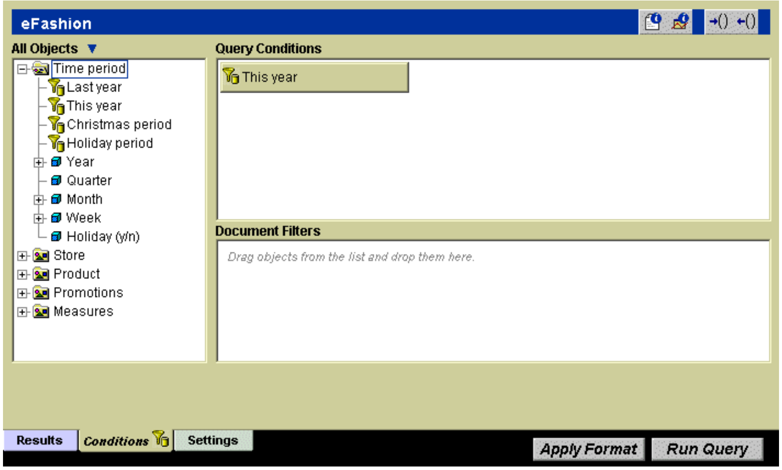
- Removing a Condition
- Editing the Data
- Create Document Sections
- Format the Document
- The Finished Document

Removing a Condition

Right now the document displays only this year's sales figures, but you also wish to see how this year's figures compare to those of the past two years. To view all of the years together, you remove the pre-defined condition that you applied to the year in Lesson Two.

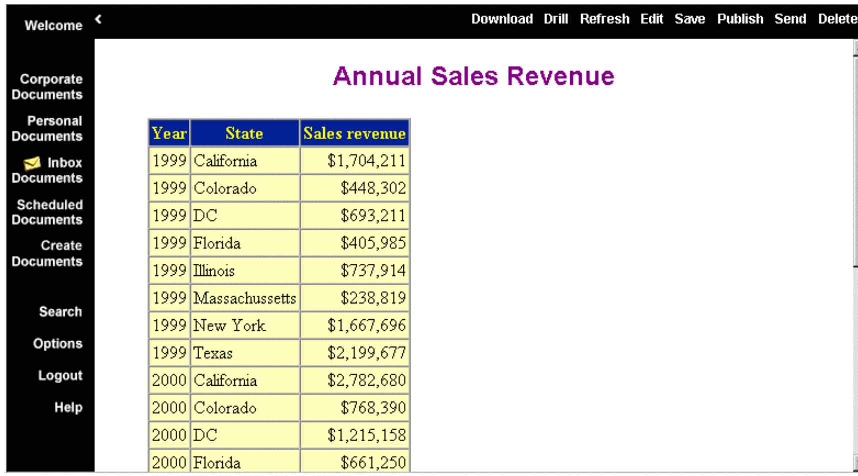
To do this:

1. Open the document that you created in Lesson Two, or Lesson2, from your Personal Documents list.
2. Click Edit to access the Web Panel.
3. Click the Conditions tab.
   The Conditions Panel appears.



4. Click and drag the This Year condition from the Query Conditions Panel and drop it anywhere in the Objects Panel.
   The Query Conditions panel is now empty.

5. Click Run Query to retrieve the new information.
   Your table now looks like this:



Year	State	Sales revenue
1999	California	$1,704,211
1999	Colorado	$448,302
1999	DC	$693,211
1999	Florida	$405,985
1999	Illinois	$737,914
1999	Massachussetts	$238,819
1999	New York	$1,667,696
1999	Texas	$2,199,677
2000	California	$2,782,680
2000	Colorado	$768,390
2000	DC	$1,215,158
2000	Florida	$661,250

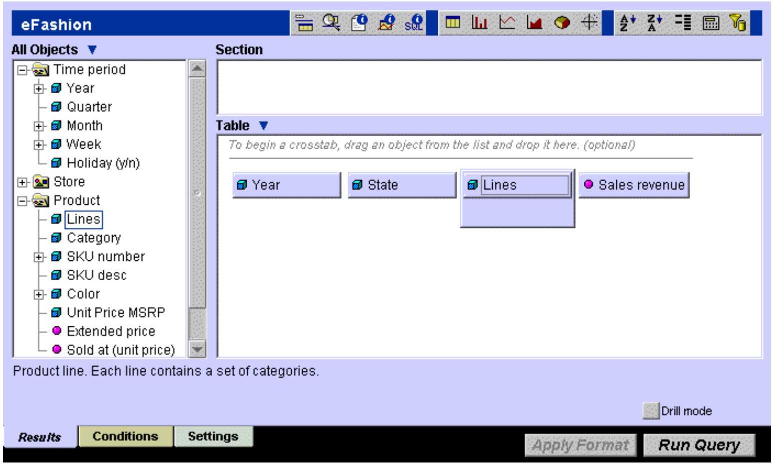
Editing the Data

Your table gives you a high level view of revenue per state, but you are interested in viewing the sales revenue for the product lines individually to analyze the performance of your store in greater detail. Let's begin by adding the new data to the document.

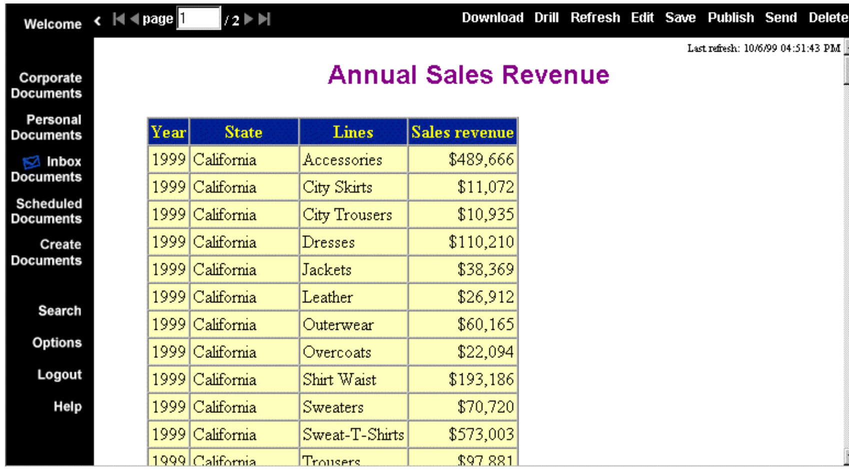
Adding More Data to the Document

Whenever you add new data to the Table area, remember that the table columns appear in exactly the same order as the objects in the Web Panel. When you add the data for the product lines to the query, you want it to appear left of Sales Revenue in the table. Here's how to do it:

1. Click Edit to access the Web Panel.
2. Open the Product folder.
3. Click and drag Lines to the Table area until the cursor is directly over Sales Revenue.
   The object appears to the left of Sales Revenue.



4. Click Run Query to view the results.



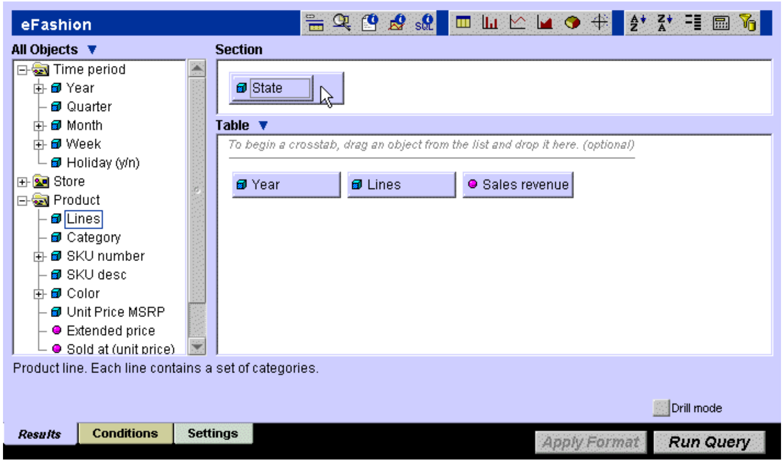
Year	State	Lines	Sales revenue
1999	California	Accessories	$489,666
1999	California	City Skirts	$11,072
1999	California	City Trousers	$10,935
1999	California	Dresses	$110,210
1999	California	Jackets	$38,369
1999	California	Leather	$26,912
1999	California	Outerwear	$60,165
1999	California	Overcoats	$22,094
1999	California	Shirt Waist	$193,186
1999	California	Sweaters	$70,720
1999	California	Sweat-T-Shirts	$573,003

Create Document Sections

Right now the information for each state is included in the same table; this makes the table extremely long and hard to analyze. By moving the state names from the table to the section heading, you can view the information for each state individually. This would make the document easier to read.

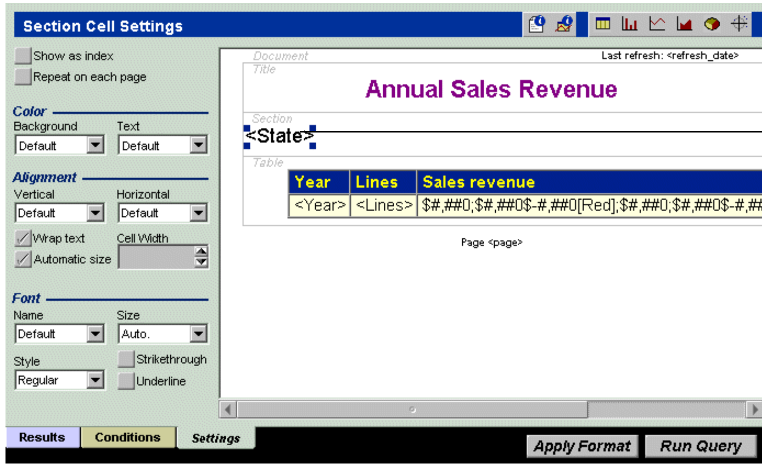
1. Click Edit to return to the Web Panel.

2. In the Web Panel, click and drag the State object from the Table area to the Section area.



3. Click the Settings tab to view the Document Settings.

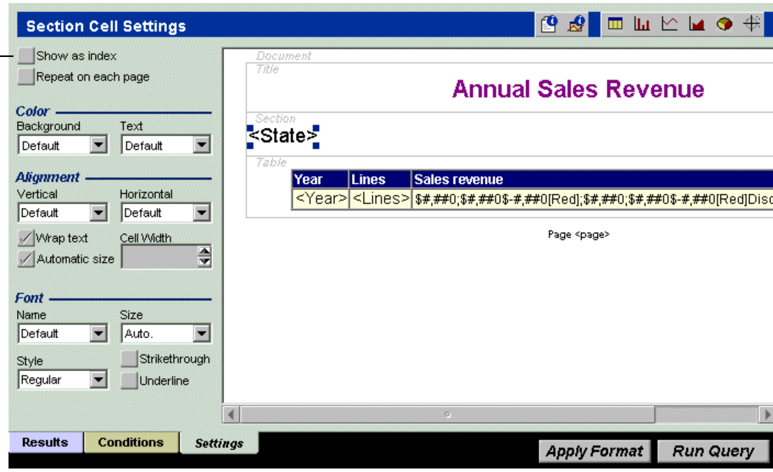
4. Click the section title, State.



Click here

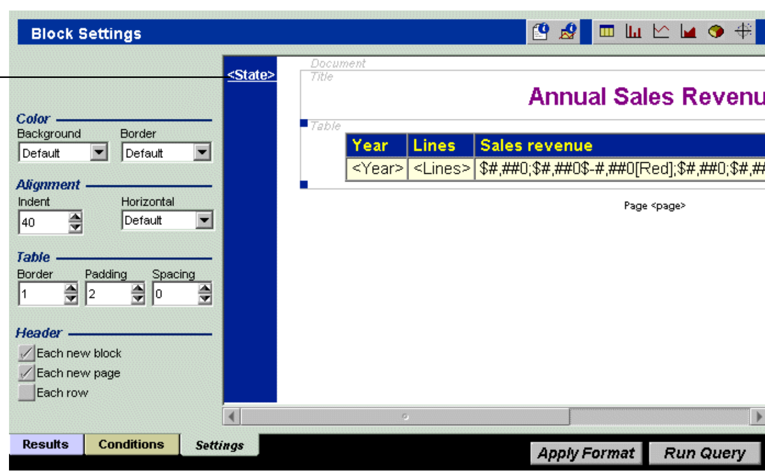
5. Check the box, Show as index.

Show as index

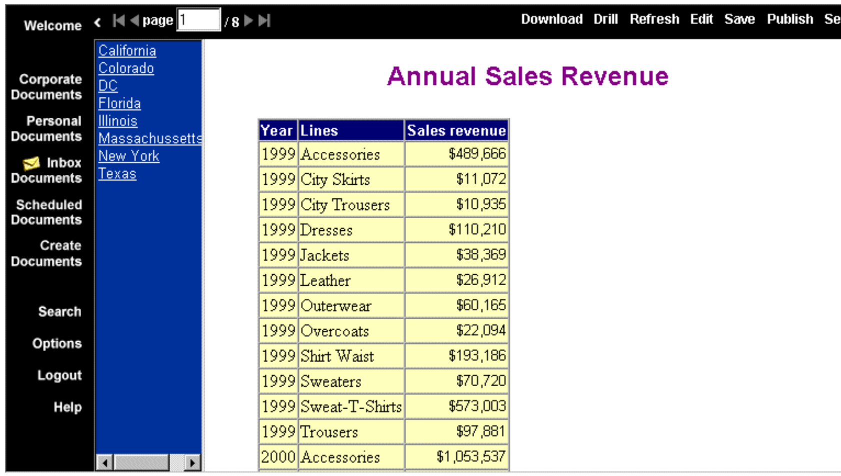


The section header, State, moves into a navigation bar to the left of the document area.

Navigation bar



6. Click Run Query.
WEBINTELLIGENCE reorganizes the data in the document.



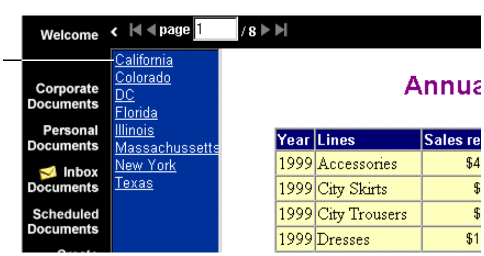
Navigate Through the Document

You have created a navigable index which allows you to view the sales revenue for each product line by state. All you have to do is click on the state on the navigation bar. You can also navigate through the document with the paging arrows in the Document Results menu bar.

You want to view the results for different states like New York, for example, to see how their Sales Revenue results compare to yours in California. Do one of the following:

- Click on New York in the index on the left of the Document Results page.

Click on the state you would like to view.



The sales revenue for New York is displayed in the Document Results page.

- Click the paging arrows to navigate page by page until you arrive at the table for New York.

a. Click here to return to the first page of the document.

b. Click here to go back one page.

c. Click here to go forward one page.

d. Click here to go to the last page of the document.

Format the Document

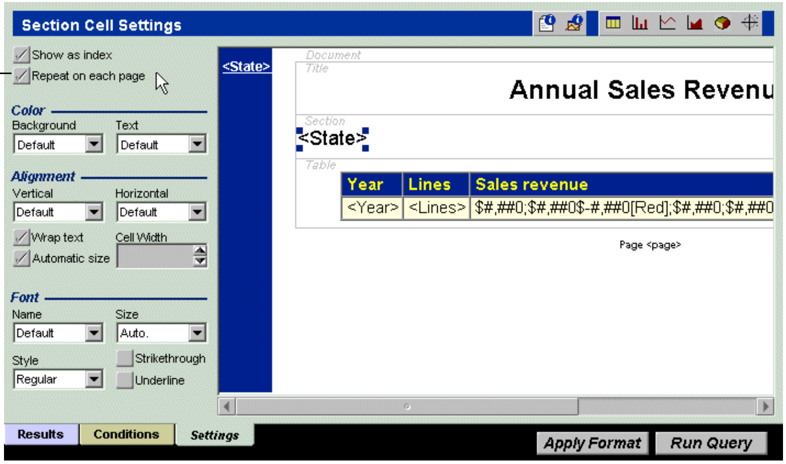
To further enhance the document you can format the section titles and colors, and display the state name above the table in each section.

Repeat the Section Title Above the Table

You want the section title to appear on each page as well as on the navigable index in the document so that you can instantly see which state the table is for.

1. Click Edit to return to the Web Panel.
2. Click the Settings tab.
3. Click State on the navigation bar.
4. Check the box Repeat on each page.
   The section title appears on each page whenyou view the document.

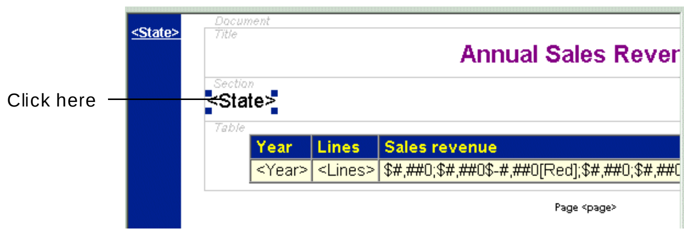
Repeat on each page



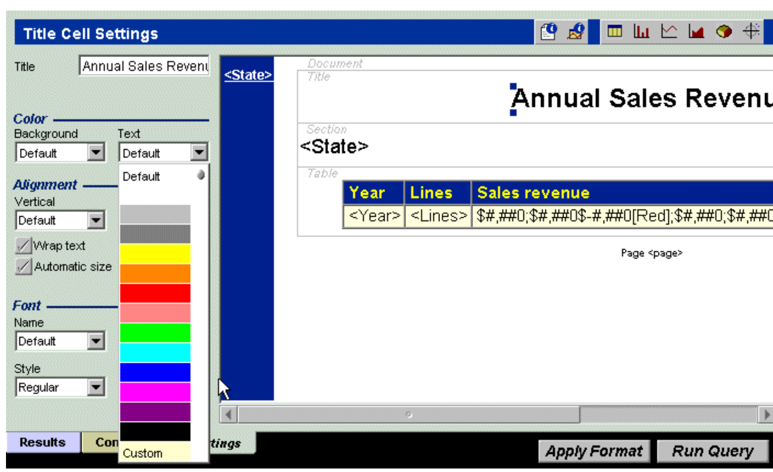
Format the Section Title

You would like to change the color and text style of the sections. One of the colors in your corporate standards is not available in the list of colors, so you have to create it using the custom color selector.

1. Click on the section title, State, in the Section area of the Settings Panel.



2. Open the list of colors for Text from the Color options.
A drop-down list of colors appears.



Create a Custom Color

To create the dark blue color that is common throughout eFashion correspondence, you create a custom color.

1. Select Custom from the drop-down list of colors.
The Custom Color window appears.

2. Enter the following values in the fields for the corresponding colors:
- Red = 0
- Green = 0
- Blue = 118

3. Press the Tab key to enter the last value.
The color box should be dark blue.

4. Click OK.

Note: Refer to this procedure each time that you want to apply a custom color.

Format the Navigable Index

You want the navigation bar for the section to match the color of the section heading in the document. You can also change the font and size of the text.

Change the background color

To apply the custom color to the navigation bar:

1. Click the Section heading, State, on the navigation bar.
2. Open the list of colors for Background from the Color options.
   A drop-down list of colors appears.
3. Select Custom from the drop-down list of colors.
4. Apply the same dark blue custom color you just created in the previous steps.

Change the text style

To apply a new font and change the type size:

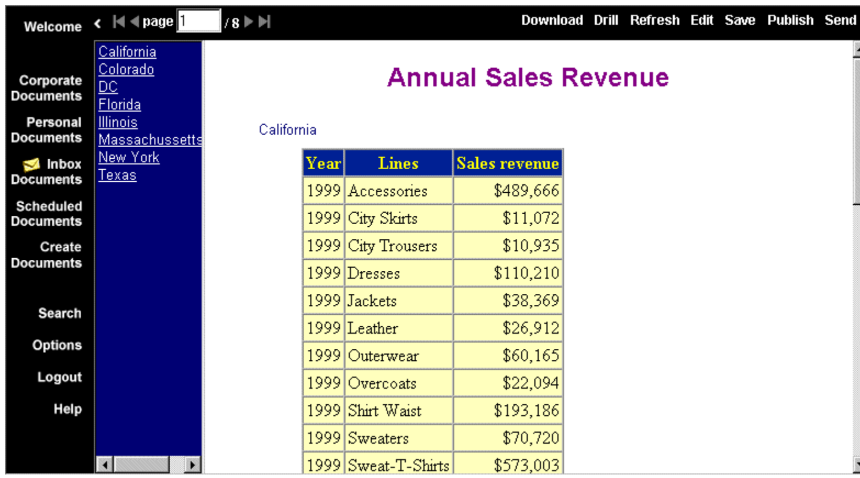
1. Select the section title on the navigation bar.
2. From the Font options, select the following:
   - From the Font menu, select Arial
   - From the Size menu, select 12pt
   - From the Style menu, select Regular
3. Apply these same properties to the section title in the Section area.
4. Click Apply Format to view results.
5. Save your document as Lesson 3 with a new document description to the Getting Started Samples category you created in Lesson Two.

Note: It is important to make a habit of giving your documents meaningful titles so they are easier to locate in a long list of documents.

The Finished Document

Your finished document contains a table with an index from which you can easily navigate to different sections without having to scroll through the whole document to find the information you need. The document is also formatted in the corporate styles.

In the next lesson you learn to change the table style to best suit the document.



Return to topic:

Lesson 4 Limiting the Information Displayed in the Table

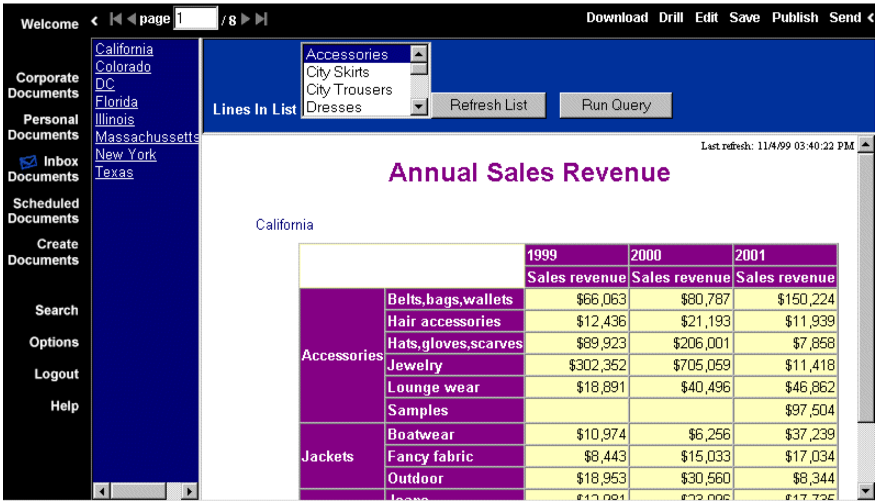
In this lesson

- **Business question**
  How do I limit the information displayed in the document?
- **Learning objective**
  Change the table format and provide multiple levels of information for analyzing product line performance.
- **Time**
  10 minutes
- **Finished report**
  lesson4

Objective

You have created a document that shows the sales revenue that each product line generated for the last three years, and you have divided the information by state. You are planning on sending this document to your Product Line Managers, but each manager does not need all of the information you included in the document.

In this lesson you add another level of detail to your table, and set up your document so that product line managers can focus on just the products that interest them.



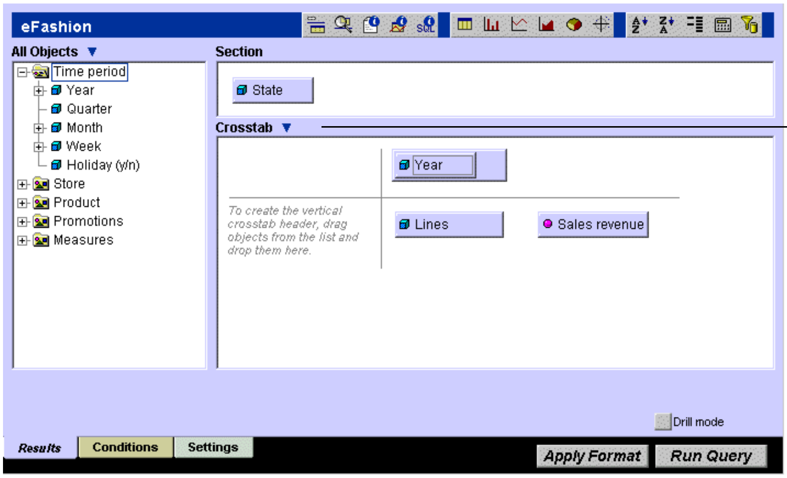
Change the Table to a Crosstab

Right now you are using a standard table to view the information, but wouldn't it be simpler to view your information without repeating the year on each line row of the table? You can do this by using a crosstab.

1. Open the document Lesson3, from your Personal Documents list.

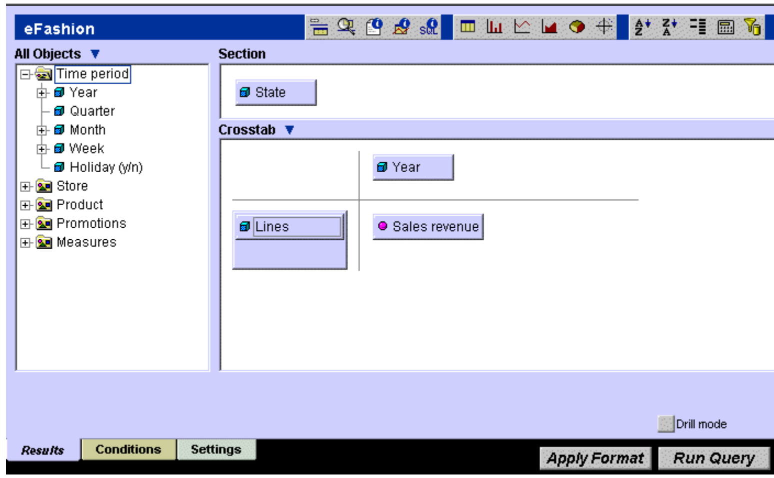
1. Click Edit to return to the Web Panel.

2. Click and drag the Year object to the area above the gray line in the Table area. The dividing lines for the crosstab appear in the crosstab area.

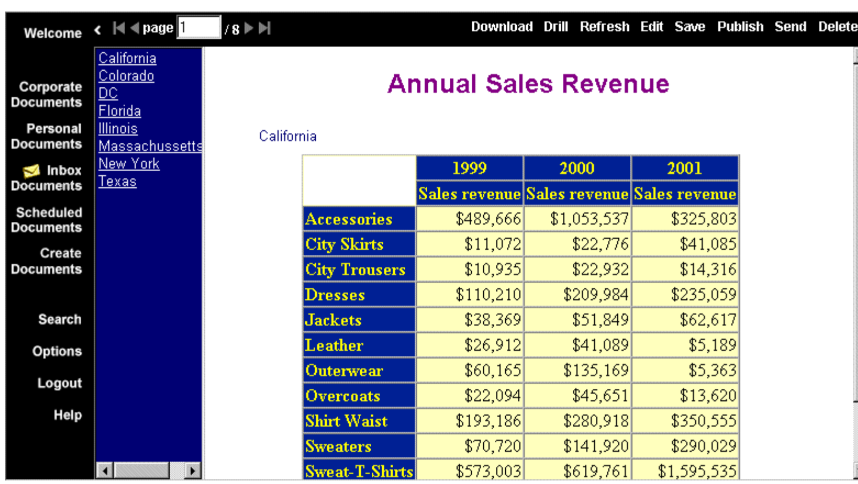


Notice the Table area is now the Crosstab area.

3. Click and drag the Lines object to the left of the crosstab dividing line.



4. Click Apply Format.
Here is the result:

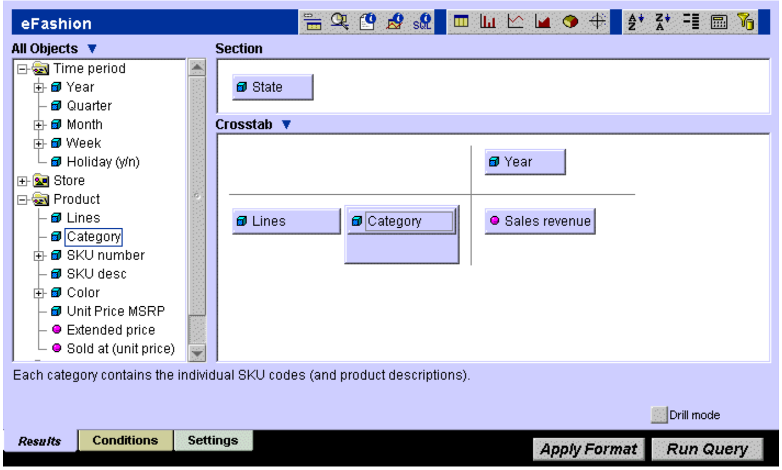


	1999	2000	2001
	Sales revenue	Sales revenue	Sales revenue
Accessories	$489,666	$1,053,537	$325,803
City Skirts	$11,072	$22,776	$41,085
City Trousers	$10,935	$22,932	$14,316
Dresses	$110,210	$209,984	$235,059
Jackets	$38,369	$51,849	$62,617
Leather	$26,912	$41,089	$5,189
Outerwear	$60,165	$135,169	$5,363
Overcoats	$22,094	$45,651	$13,620
Shirt Waist	$193,186	$280,918	$350,555
Sweaters	$70,720	$141,920	$290,029
Sweat-T-Shirts	$573,003	$619,761	$1,595,535

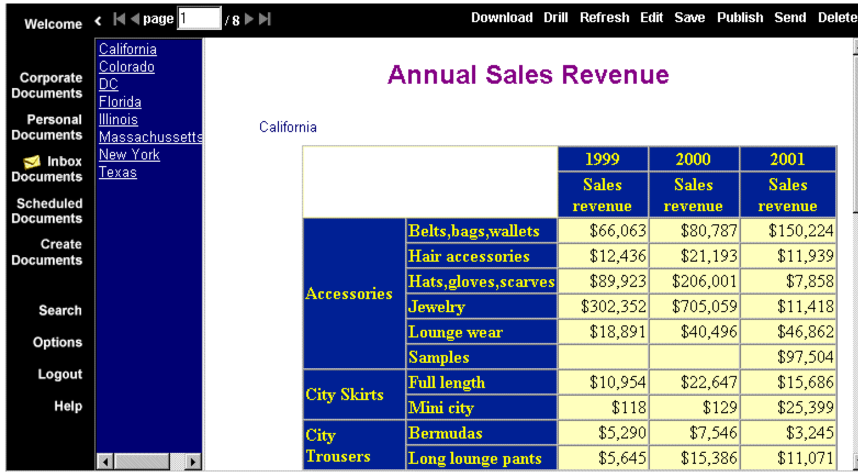
Add More Data

To further analyze the sales revenue figures, you need more detailed information. To get a complete view of how each product line performed, you would like to see the categories within each line. Once you have added the new data to the document, you need to format the table according to the corporate styles. First, let's get new information from the database.

1. Click Edit to return to the Web Panel.
2. Open the Product folder in the Objects area of the Web Panel.
3. Click and drag the Category object to the Crosstab area, right of the Lines object.



4. Click Run Query to view the results.



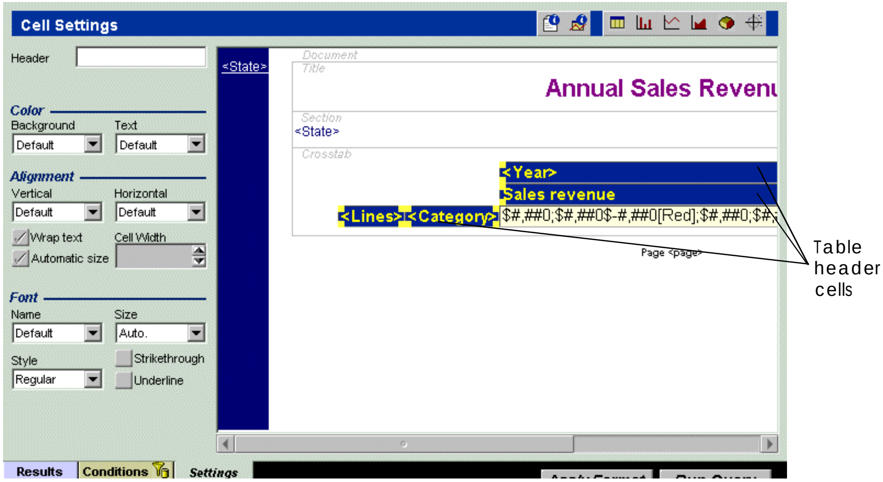
Format the Table

Format the table in the same way that you formatted the title and section headings using the corporate colors and styles.

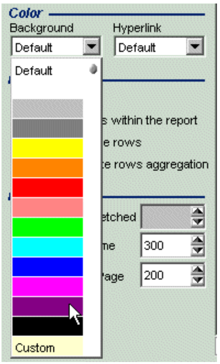
1. Click Edit to return to the Web Panel.

2. Click the Settings tab.

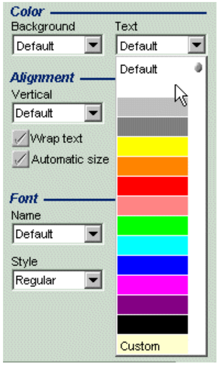
3. Select all of the table header cells.
   To select multiple table cells, hold the CTRL key while selecting the cells.



4. From the Color section of the format options, Choose Violet from the Background menu.

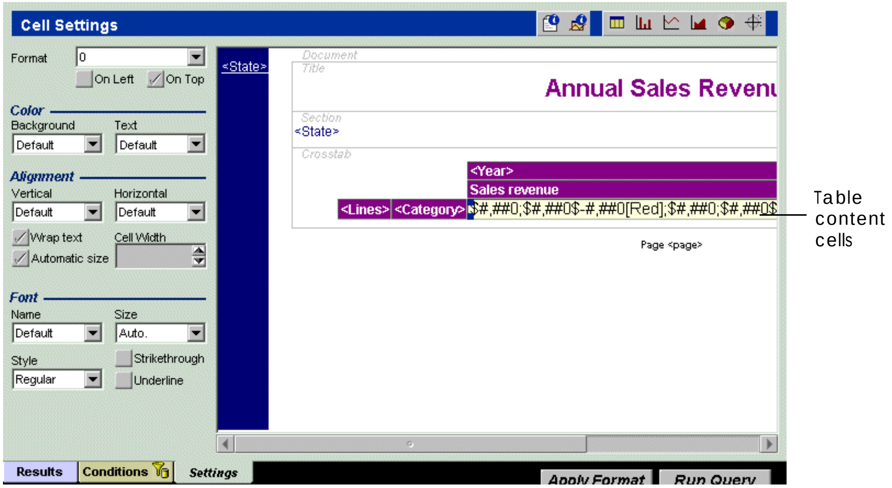


5. From the Color section of the format options, Choose White from the Text menu.



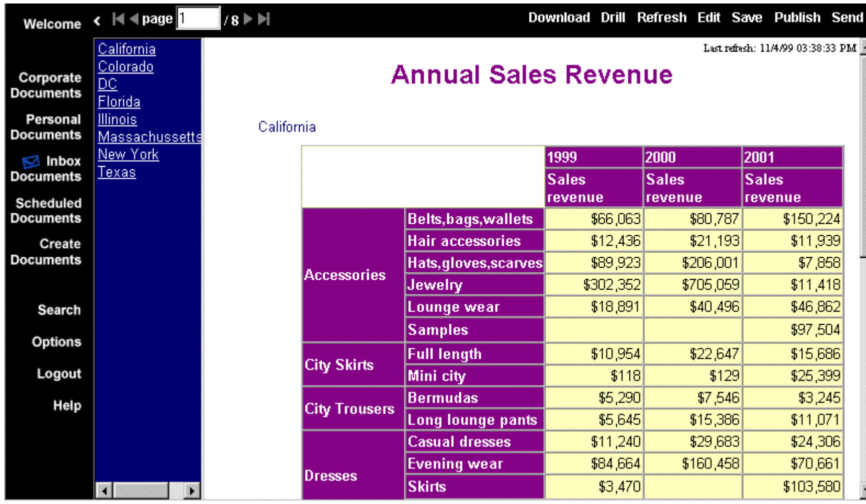
6. From the Font options, select the following:
   - From the Font menu, select Arial
   - From the Size menu, select 12pt
   - From the Style menu, select Bold

7. Select the table content cells.



8. From the Font options, select the following:
   - From the Font menu, select Arial
   - From the Size menu, select 12pt
   - From the Style menu, select Regular

9. Click Apply Format to view the results.



		1999	2000	2001
		Sales revenue	Sales revenue	Sales revenue
Accessories	Belts,bags,wallets	$66,063	$80,787	$150,224
	Hair accessories	$12,436	$21,193	$11,939
	Hats,gloves,scarves	$89,923	$206,001	$7,858
	Jewelry	$302,352	$705,059	$11,418
	Lounge wear	$18,891	$40,496	$46,862
	Samples			$97,504
City Skirts	Full length	$10,954	$22,647	$15,686
	Mini city	$118	$129	$25,399
City Trousers	Bermudas	$5,290	$7,546	$3,245
	Long lounge pants	$5,645	$15,386	$11,071
Dresses	Casual dresses	$11,240	$29,683	$24,306
	Evening wear	$84,664	$160,458	$70,661
	Skirts	$3,470		$103,580

Note: Any new data added after this section of the tutorial appears with the default font and color settings. You need to format the new data separately.

Limiting the Information Displayed

You have added all of the product lines to your query, but your product line managers are interested only in the lines for which they are responsible. To make it possible to choose which product lines display, you are going to add a condition that prompts managers to choose the lines they want to view before the information is retrieved from the database.

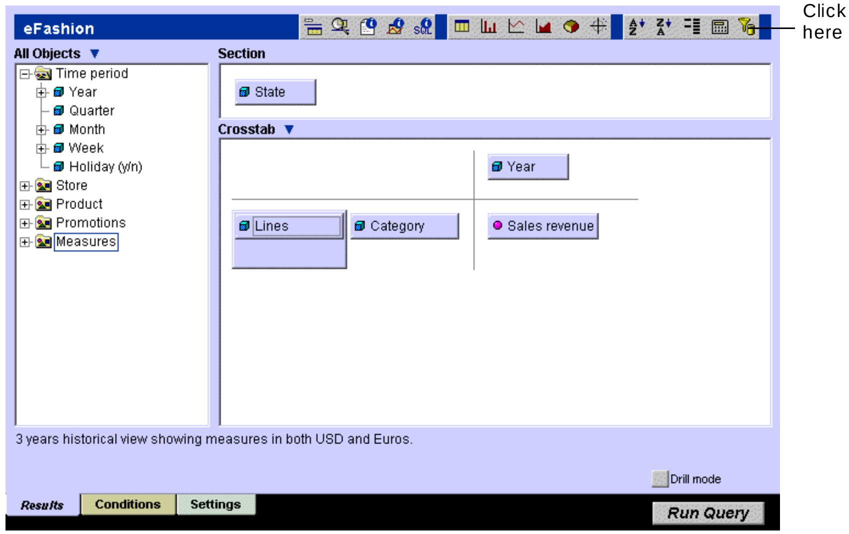
Setting Up the Prompt

Earlier in this tutorial you used a condition set up by the person who created the eFashion universe. Now you can set up a condition of your own.

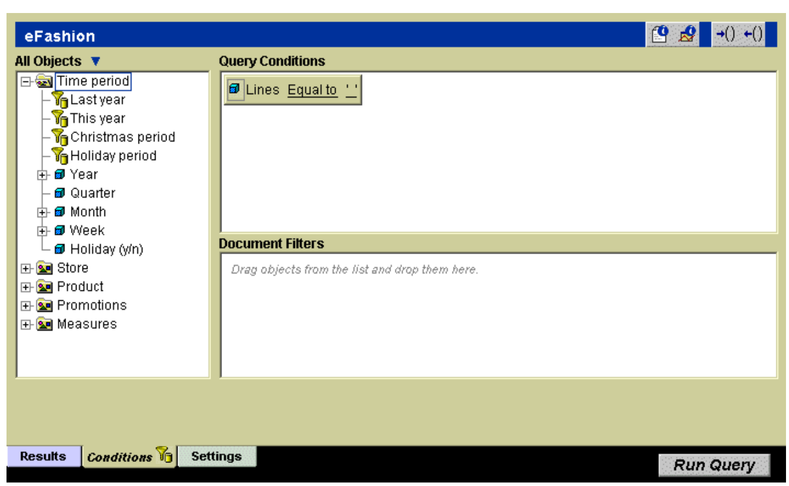
1. Click Edit to access the Web Panel.
2. Click the Lines object in the crosstab area.
   This is the object that you apply the condition to.

Conditions

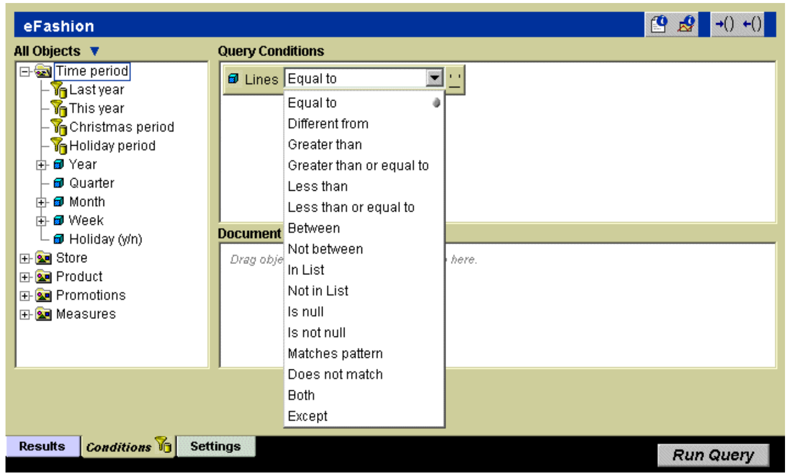
3. Click the Conditions button on the toolbar in the Web Panel.



The Conditions panel appears.



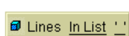
4. On the Lines object, click on Equal to, to view a list of options.



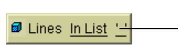
5. Select In List.

This option lets users pick a values from a list.

The condition looks like this:

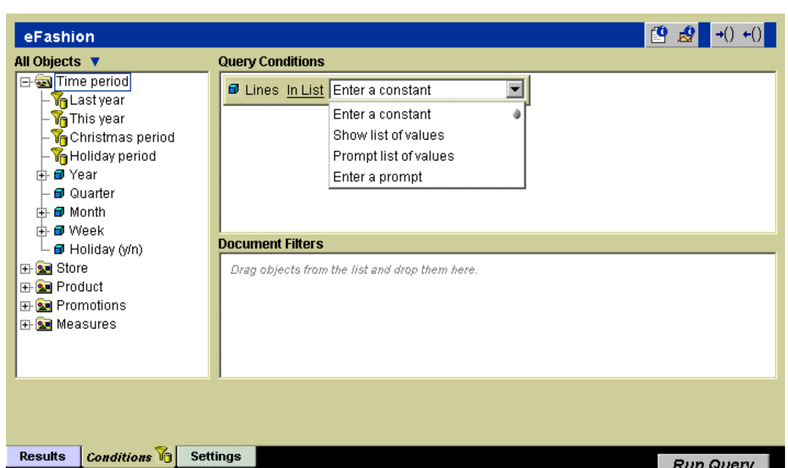


6. Click to the right of In List on the Lines object.

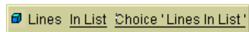


Click here

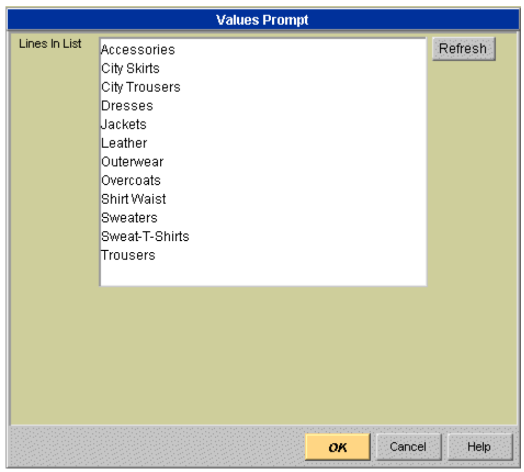
A list of options appears.



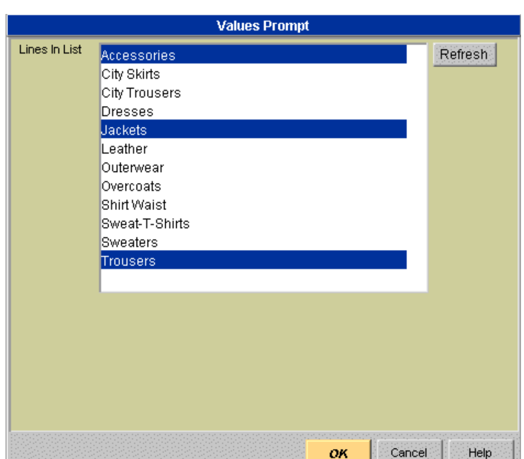
7. Select Prompt list of values.
   This option lets you choose from a list all of the available product lines
   The condition looks like this:



8. Click Run Query.
   The Values Prompt window appears.

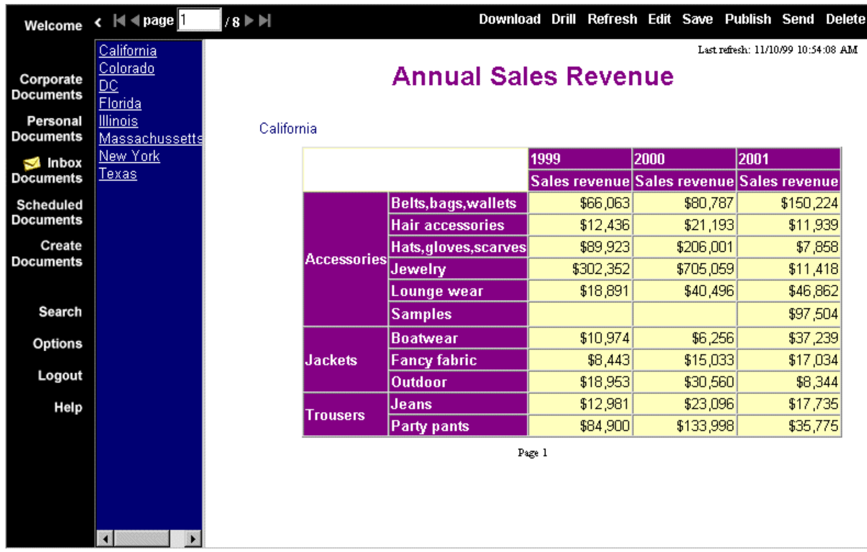


9. Hold the CTRL key, and select Accessories, Jackets, and Trousers.



10. Click OK to view the results.

The document displays only the product lines that you selected.



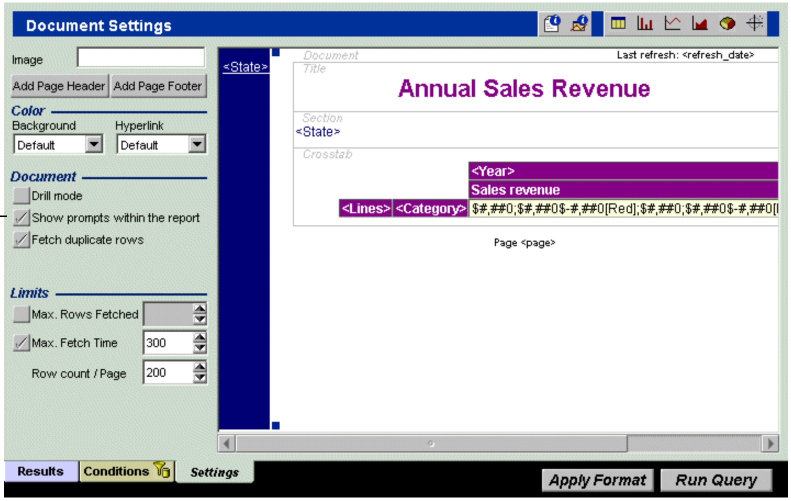
Show the Prompts in the Document

You would like to provide one document for all of the product managers that enables them to view only the product lines that they manage. In this way, each manager runs a new query from the list of options that appears at the top of the Document Results page.

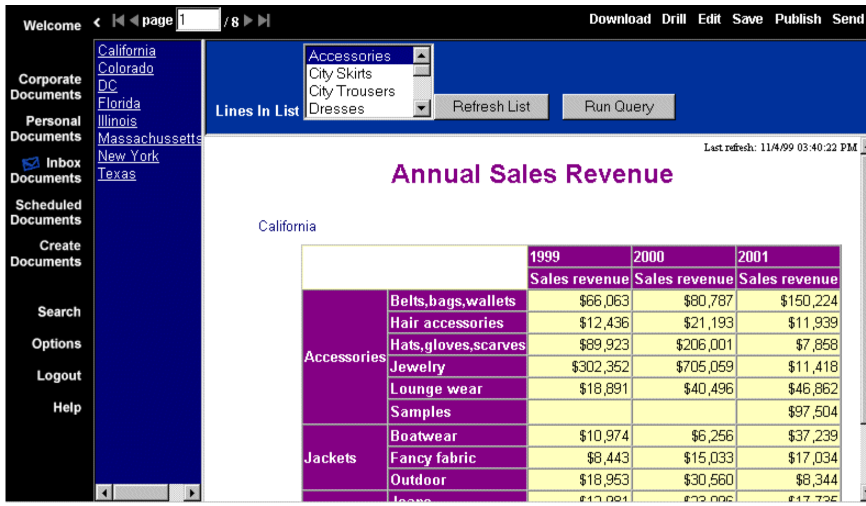
To show the prompts within the document:

1. Click Edit to view the Web Panel.
2. Click the Settings tab.
3. Check the box *Show prompts within the report*.

Click here



4. Click Apply Format.
The result is a list box above the table of all of the product lines eFashion has to offer. You can select one or more lines from the list and run a new query to retrieve the data.

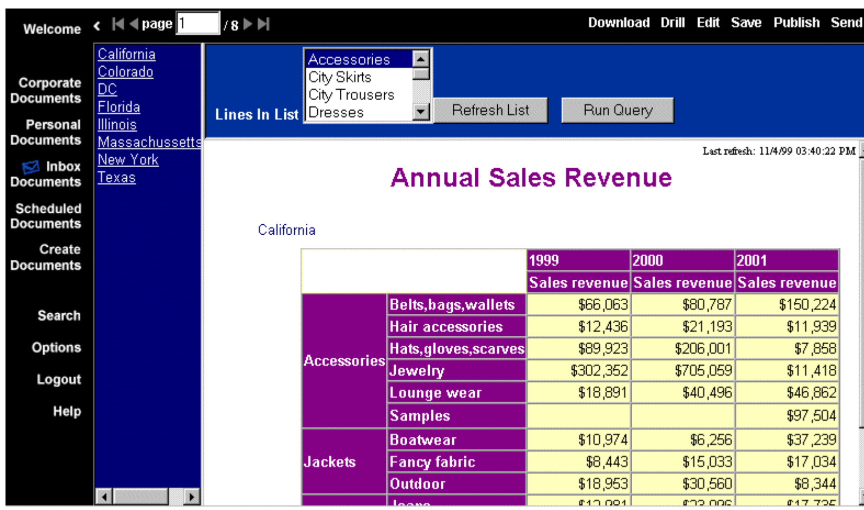


5. Click Save.
Save the document with a new title and document description to the Getting Started Samples category you created in Lesson Two.

The Finished Document

Now you have set up your document to focus on the product lines that you are interested in for selected states. Including prompts within the document makes it easy for product managers to focus on their specific product lines whenever they update the document.

The next lesson explains how to add a total for the sales revenue, and download your document into a spreadsheet so that you can perform complex calculations on the data.



Return to topic:

Lesson 5

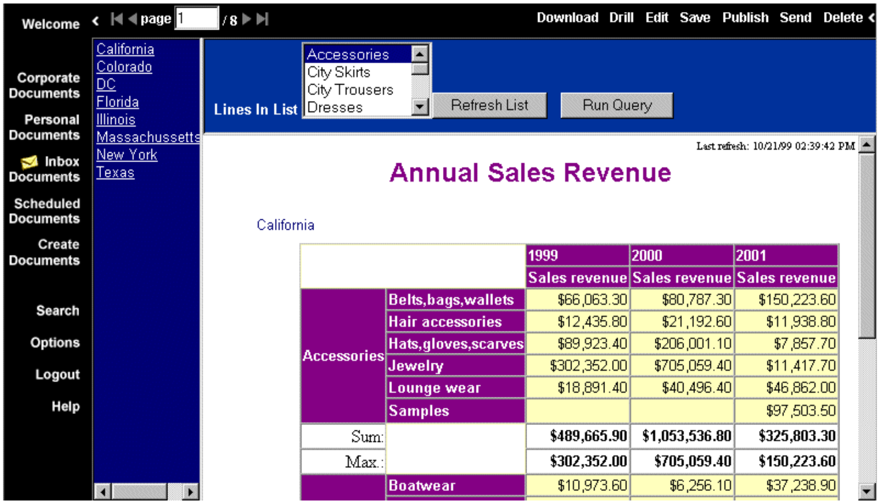
Which Lines Produced the Most Revenue?

In this lesson

- **Business question**
  Which lines produced the most revenue?
- **Learning objective**
  Create a table that displays the total sales revenue and download the data to a spreadsheet for further analysis.
- **Time**
  10 minutes
- **Finished report**
  lesson 5

Objective

In the previous lesson you learned how to convert tables to crosstabs. A crosstab is a good way to organize your data and allow for calculations. In this lesson you learn how to apply a calculation to the crosstab in order to display the total revenue for each product line as well as for all product lines combined. The end result looks like this:



Break up the Data

Your document shows all of the data in one large block. You would like to break up this block, avoid repetitive information, and make the data easier to analyze. Inserting a break allows you to apply a sum calculation which reveals the total sales revenue for each year and for all product lines.

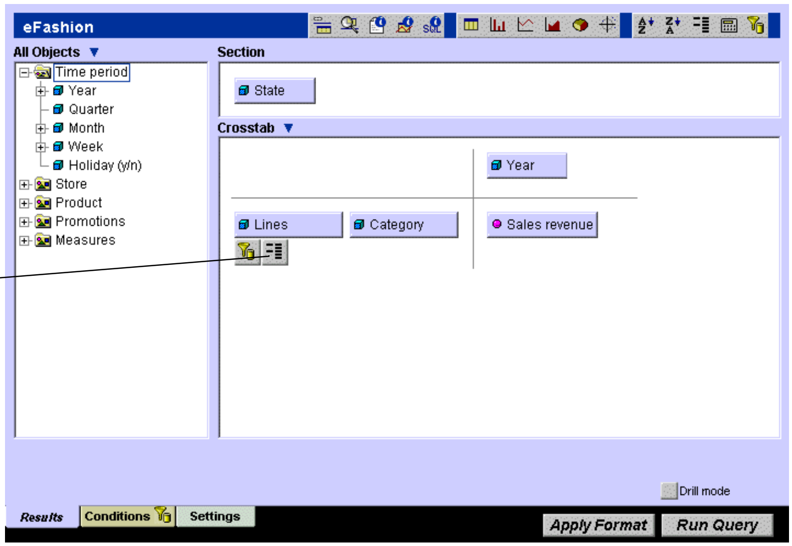
To apply a break:

1. Open the document lesson4, from your Personal Documents list.
2. Click Edit to view the Web Panel.
3. Click the Lines object in the Crosstab area.

Break

4. Click the Break button in the toolbar.
   The break icon appears on the Lines object.

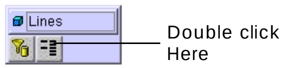
The break icon appears on the Lines object



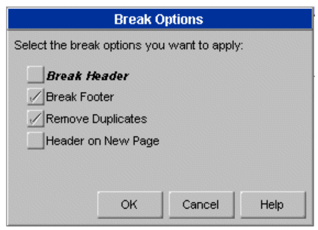
Select a Break Style

Several options are available for breaks. To select them:

1. Double click the break icon on the Lines object.

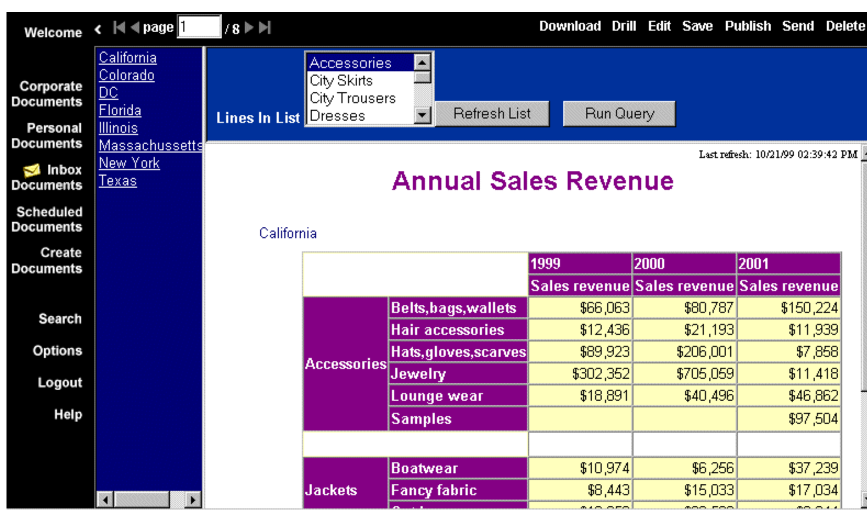


The Break Options window appears.



2. Make sure the options Break Footer, and Remove Duplicates are selected, then click OK.

3. Click Apply Format.
Your table is now divided into product lines separated by a blank row.



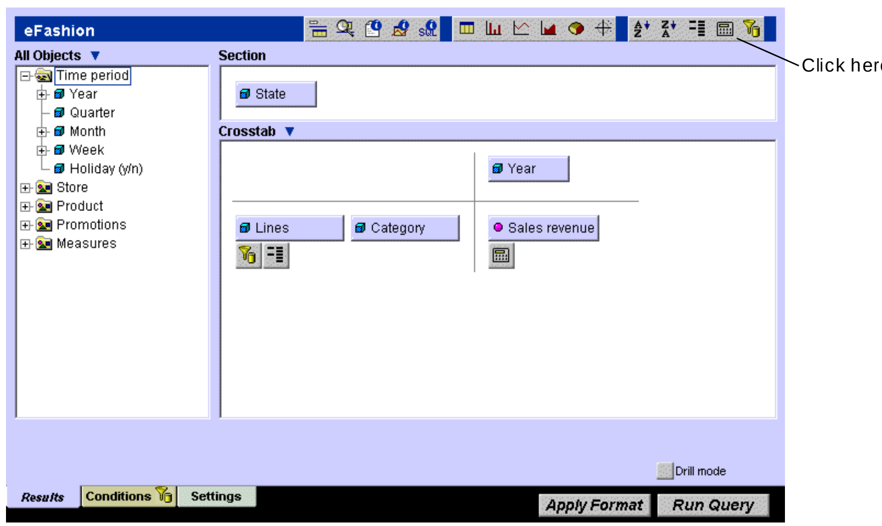
Note: For more information on break options, refer to the *WebIntelligence User's Guide.*

Calculate Total Sales Revenue

With the document break applied it is easy to apply a sum calculation to show the total revenue for each product line and a grand total for all product lines combined. To add a calculation:

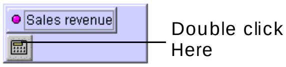
1. Click Edit to return to the Web Panel.
2. Click the Sales Revenue measure in the Crosstab area.
3. Click the Calculations button in the toolbar.
   The calculation icon appears on the Sales Revenue measure.

Calculation

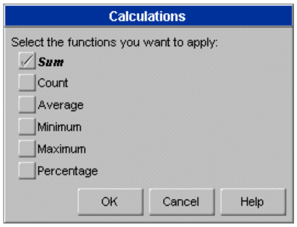


There are several options for calculations available. You want to calculate the total revenue for each year.

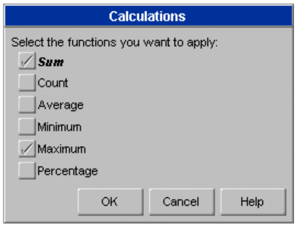
4. Double click the calculations icon on the Sales Revenue measure.



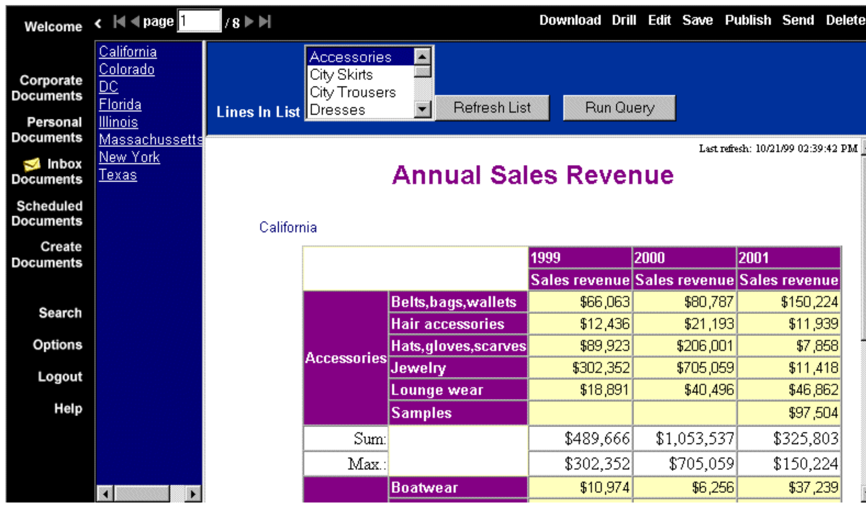
The Calculations window appears.



5. Select Sum and Maximum, and click OK.
The Sum option displays the total sum for each column and the Maximum option displays the highest figure in the column.



6. Click Apply Format.
The result is a subtotal with the highest figure for the column below each product line, and the total of all product lines at the bottom of the table.

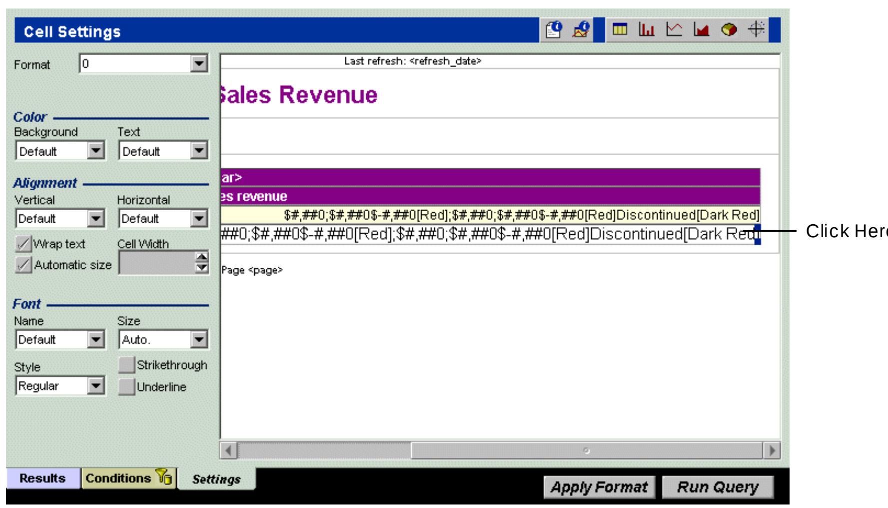


Note: If you click Run Query instead of Apply Format, a prompt appears. Select the lines you want to view and click OK.

Format the Calculation

You want to change the way the calculations are displayed. You can display the calculation in many different formats. Since we are calculating a dollar amount, you want the total to appear with a dollar sign and two decimal values.

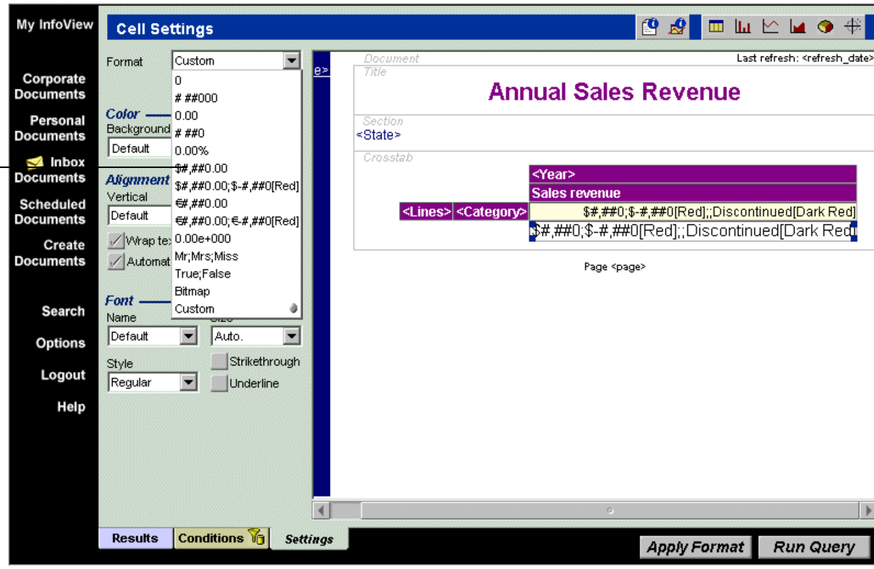
1. Click Edit to view the Web Panel.
2. Click the Settings tab.
3. Click the table cell containing the sum variable.
   You may have to scroll to the right to view the end of the table.



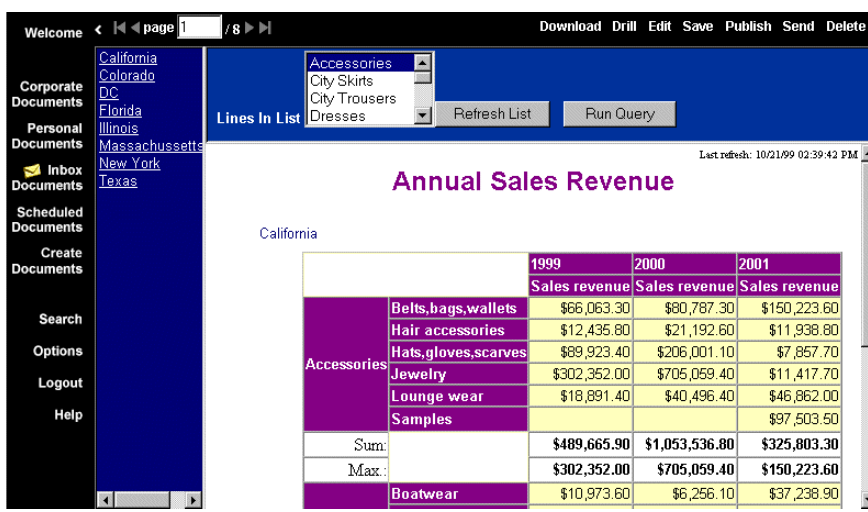
4. From the Font options, select the following:
   - From the Font menu, select Arial
   - From the Size menu, select 12pt
   - From the Style menu, select Bold

5. From the Format menu, choose $#,##0.00.

Choose this option



6. Click Apply Format to view the results.



7. Click Save.
   Save the document with a new title and document description to the Getting Started Samples category you created in Lesson Two.

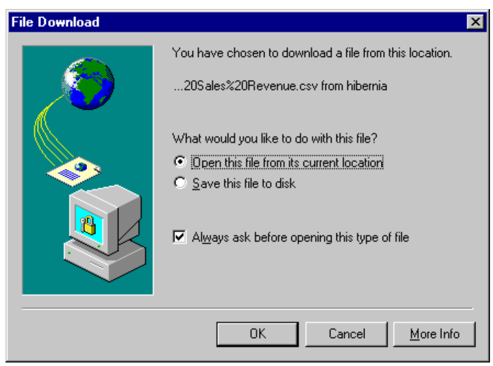
Download the Data to a Spreadsheet

The crosstab you have created is useful for analyzing past product line performance, but you are also responsible for creating the budget for next year based on these figures. Let's download the data from the table, and combine it with other data in a spreadsheet, for example Microsoft Excel, so that you can perform the calculations necessary to create next year's budget.

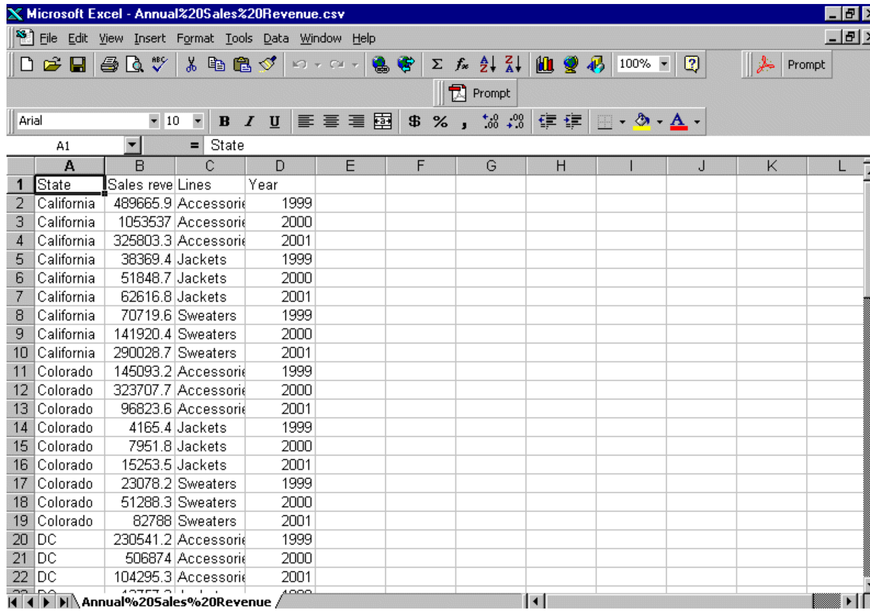
To download the data into a spreadsheet:

1. Click Download in the menu of the Document Results page.

The File Download dialog box appears.



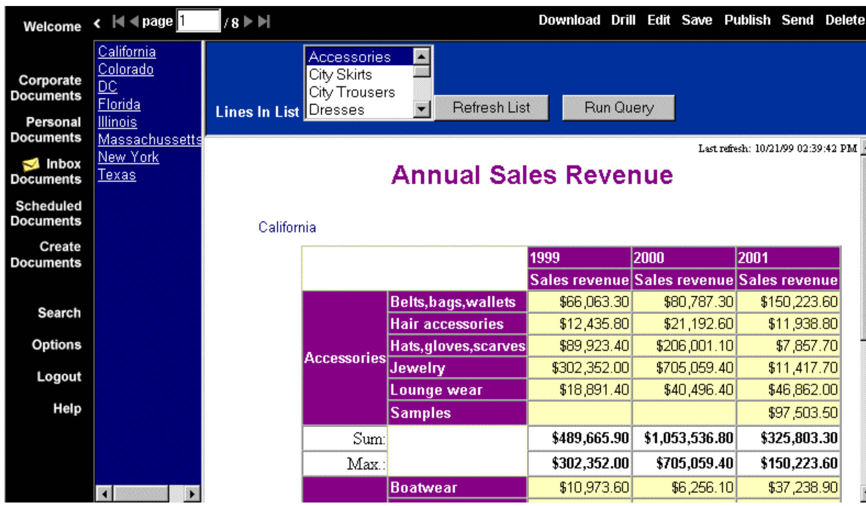
2. Select *Open this file from it's current location*, and click OK.
The data is downloaded into the spreadsheet application. You can now manipulate the data as you normally would with the spreadsheet application.



Note: The data loses all of the formatting that you have applied to it in WEBINTELLIGENCE. Refer to the online help of the application for help with formatting the data in the spreadsheet.

The Finished Document

Your finished document is easier to read with product lines separated by the sum and calculations for each product. The next lesson explains how to convert a table to a chart and how to analyze multiple levels of data in one document.



Lesson 6

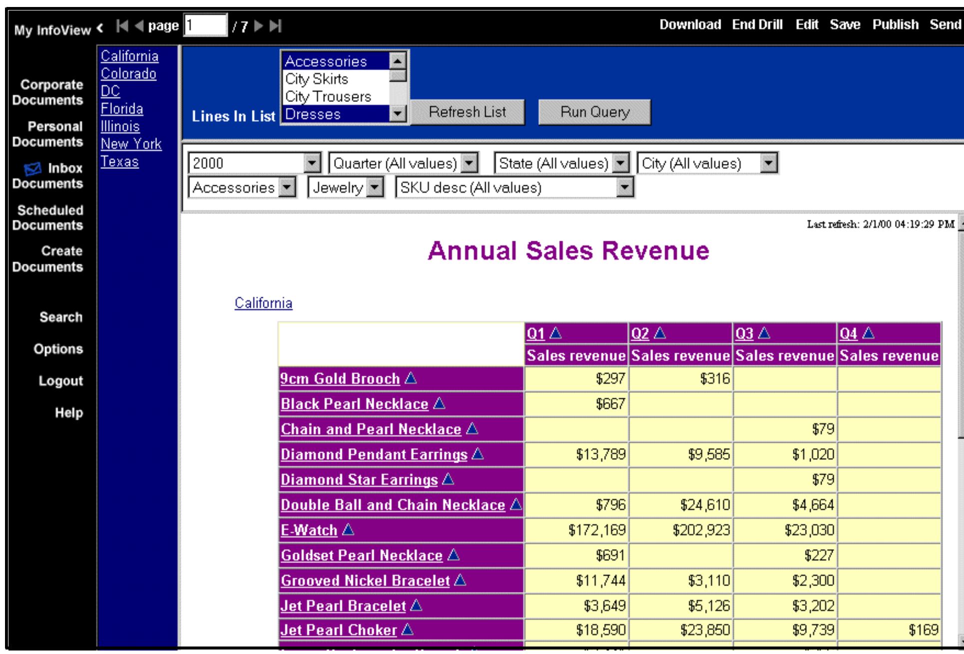
How Has Each Product Line Performed?

In this lesson

- ❑ **Business question**
  How has each product line performed?
- ❑ **Learning objective**
  Change a table to a chart and drill on the chart to analyze the data.
- ❑ **Time**
  10 minutes
- ❑ **Finished report**
  lesson6

Objective

In this lesson you will use the simple table that you created in Lesson 4, “Limiting the Information Displayed in the Table” on page 83, to build a chart that contains multiple levels of data that are contained in the document and that you can use in WEBINTELLIGENCE drill mode. Viewing a document in drill mode allows you to analyze the data from different angles and on different levels of detail. By starting at a high level of detail and drilling down to more detailed information, you can analyze how different factors, such as season, geography, and product line, affect your revenue.

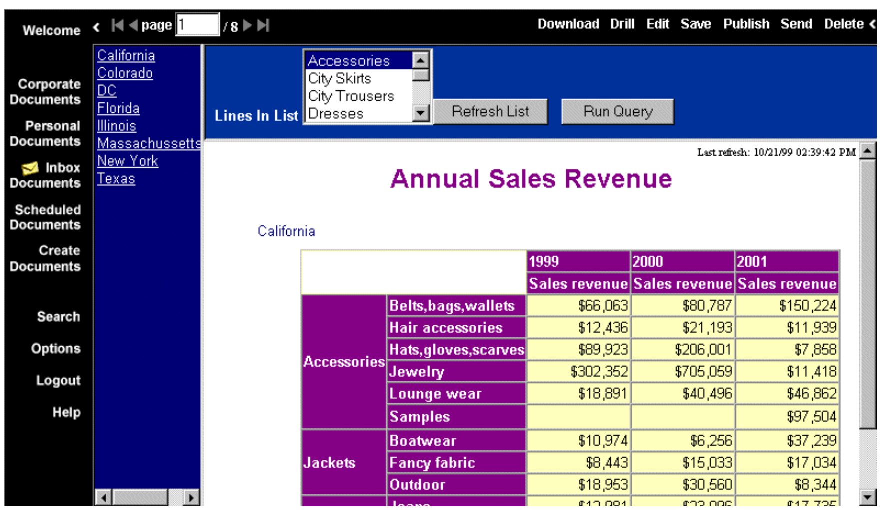


Change the Table to a Chart

The crosstab document you created in Lesson 4 shows the sales revenue for each product lines you choose when you run the query. Changing this table into a chart allows you to view a graphic summary of the performance of the product lines. This helps you better analyze sales performance and allows you to see at a glance which product lines are performing well and not so well.

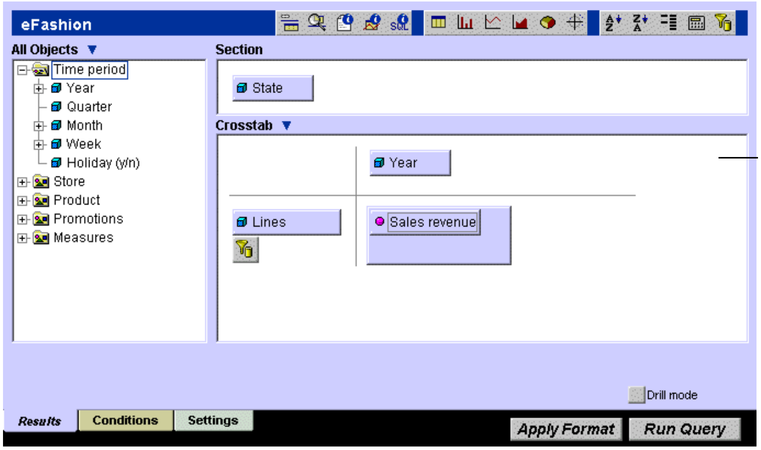
Creating a chart

1. Open the document you created in lesson4, from your Personal Documents list.
The table has more detail than you need for the chart, so first remove the Category data.



2. Click Edit to return to the Web Panel.

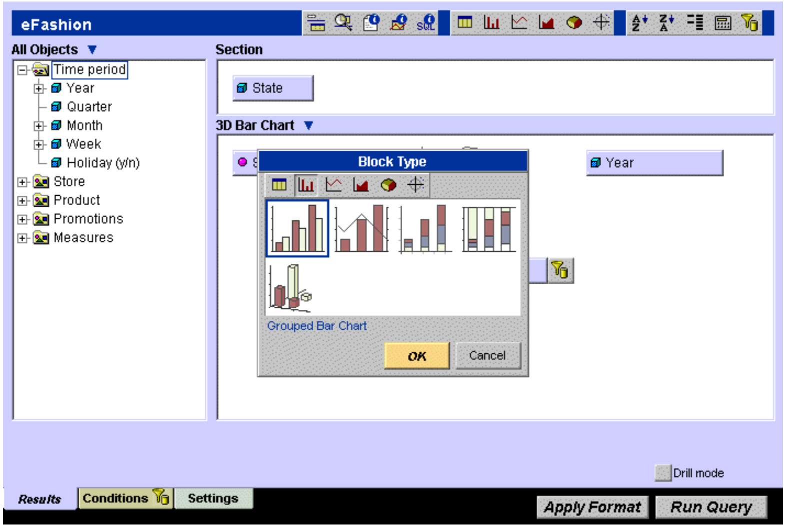
3. Click and drag the Category object from the Crosstab area to the All Objects area.
   The Crosstab area looks like this:



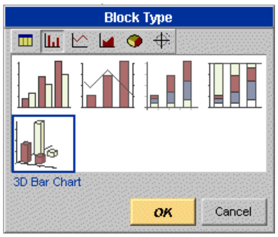
Crosstab area

Bar Charts

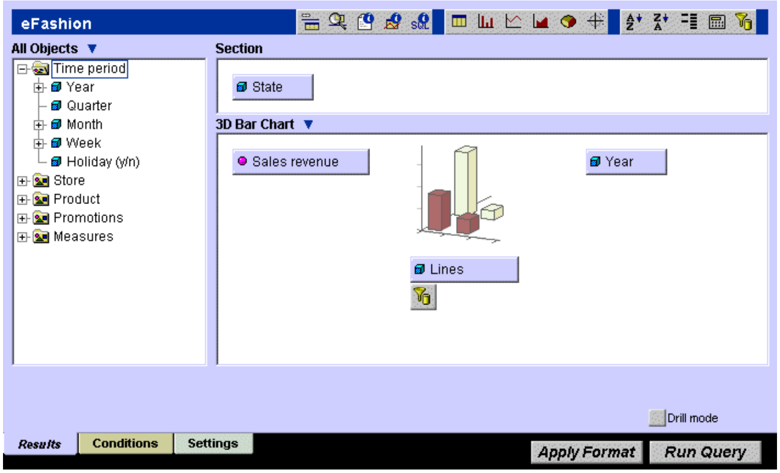
4. Click the Bar Charts button on the Web Panel toolbar.
   The Block Type window appears.



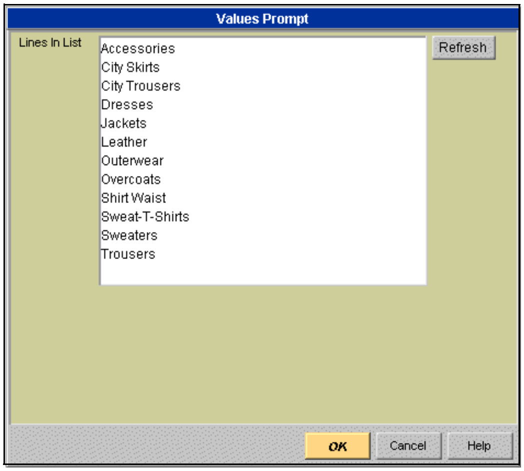
5. Select the 3D Bar Chart option.



6. Click OK.
The data objects display on a chart in the Block Panel and the title of the Block Panel changes to 3D Bar Chart.



7. Click Run Query.
   The Values Prompt dialog box appears.



8. Select the lines Accessories, Dresses, and Sweaters and click OK.
   The data displays in a 3D bar chart. Notice that the chart is too large for the page. The next section explains how to format the chart.

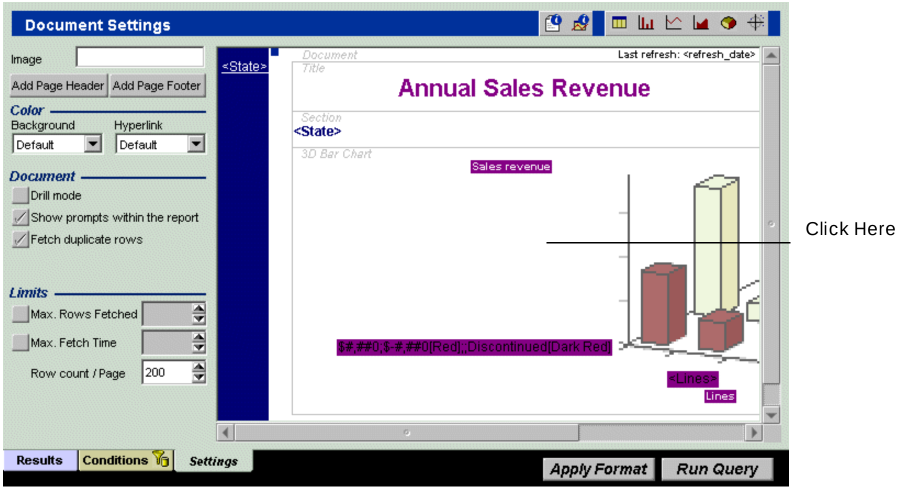
Note: The Values Prompt dialog box appears each time you click Run Query.

Format the Chart

Now that you have converted the simple data table into a chart, you need to format the chart to improve the display of the information. For example, you want to fit the chart on one page to avoid having to scroll through.

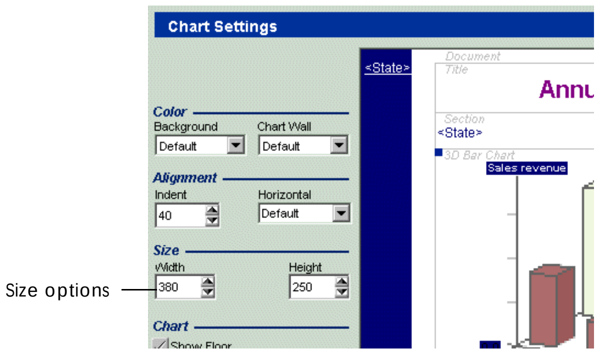
Make the Chart Fit on the Page

1. Click Edit to return to the Web Panel.
2. Click the Settings tab.
3. Click in the 3D Bar Chart area.
   The Chart Settings options appear.

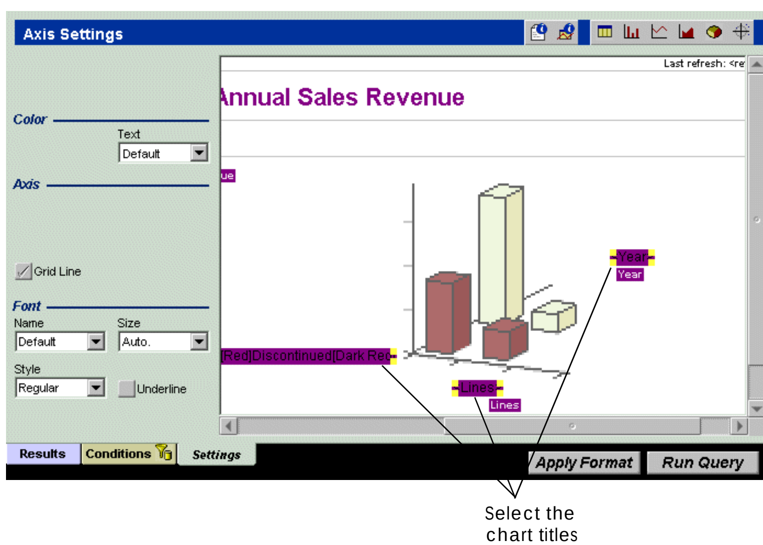


Note: You may have to scroll to the right to view the whole chart within the Settings tab.

4. In the Size options, enter the following:
- width = 380
- height = 250

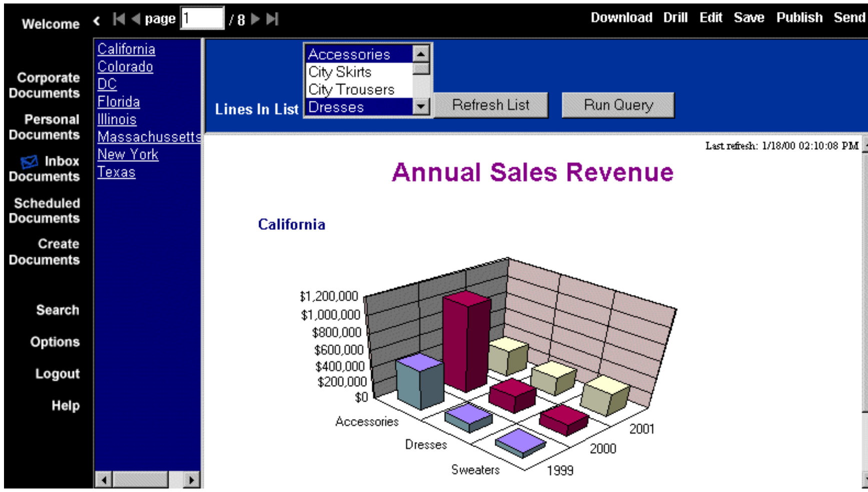


5. Select the title of each axis on the chart.
You may have to scroll right to view all of the axis titles.



6. From the Font options, select the following:
- From the Font menu, select Arial
- From the Size menu, select 12pt
- From the Style menu, select Regular

7. Click Apply Format to view the results.



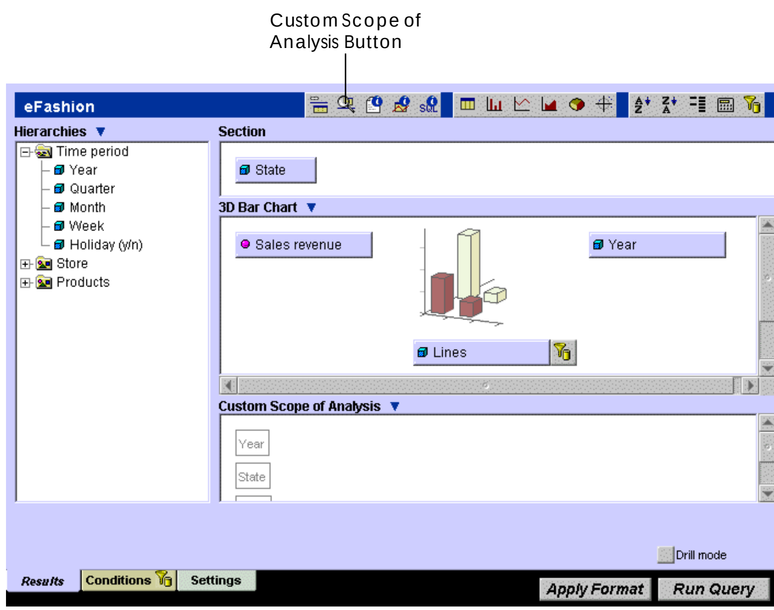
Note: For detailed descriptions of all available chart types and formatting capabilities, refer to the *WebIntelligence User's Guide*.

Make the Chart Drillable

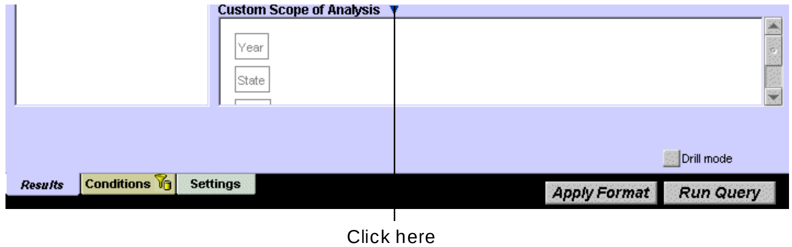
You want to provide your product managers with all of the information they may need to analyze the progress of their lines. If you include all this information in one chart, it may be difficult to read. Instead, you will create a drillable document, which provides several levels of information without displaying all of the data at once.

Custom Scope of Analysis

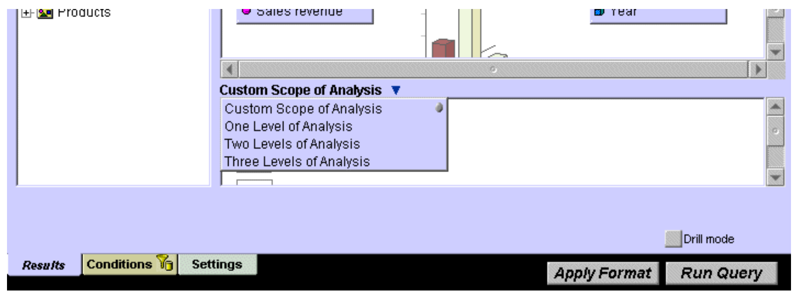
1. Click Edit to return to the Web Panel.
2. Click the Custom Scope of Analysis button on the toolbar. The Analysis Panel appears below the Block Panel.



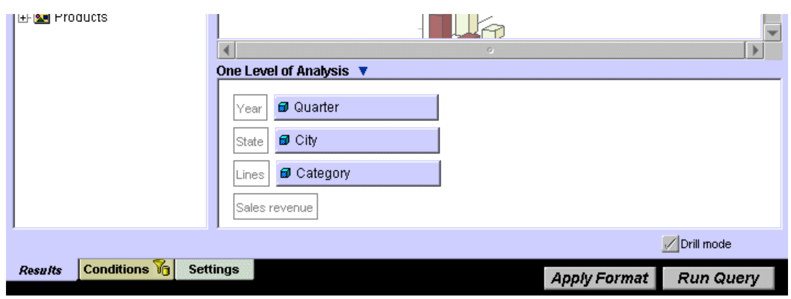
3. Click the arrow beside Custom Scope of Analysis to open a menu.



The drill options menu appears.

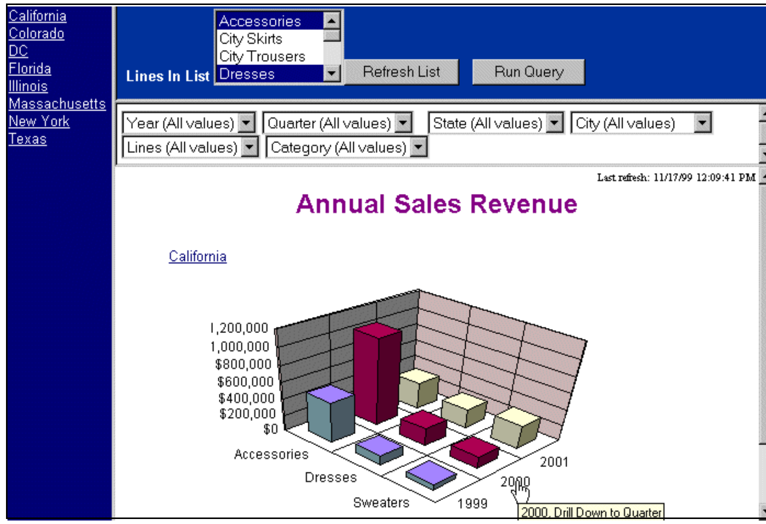


4. Select One Level of Analysis.
This option allows you to drill down to one level of detail. The objects you can drill appear in the Analysis area.



5. Click Run Query.
The Value Prompts dialog box appears.

6. Select the lines Accessories, Dresses, and Sweaters and click OK.



7. Click Save.
Save the document with a new title document description to the Getting Started Samples category you created in Lesson Two.

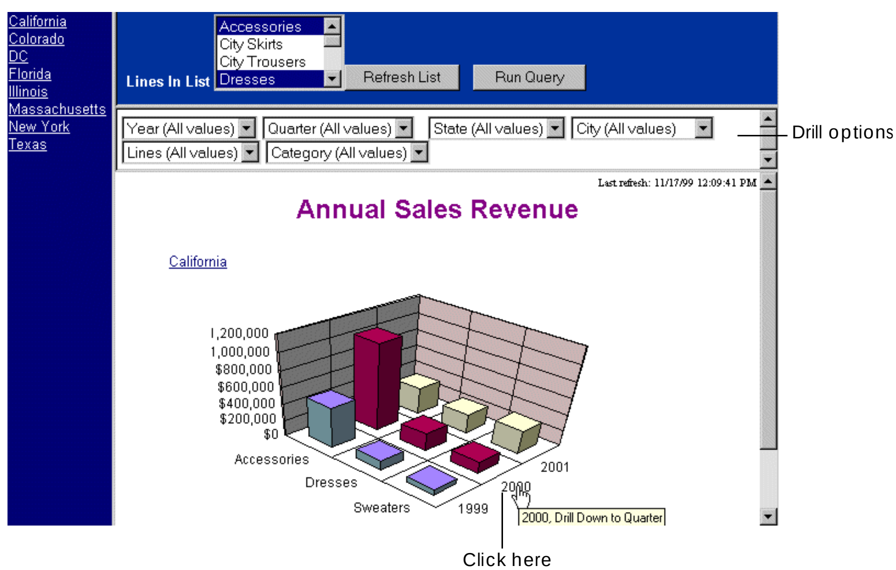
Analyze the information

You now have a drillable document with multiple layers of data that are stored within the document. You can choose to view a particular slice of data at a time to display the factors that impact the revenue of your product line. You can tell that the document is drillable because the drill options appear above the chart in the document as illustrated below. Also, when you pass the cursor over the chart the cursor changes on the drillable elements.

When you look at the chart, you will notice that the revenue for Dresses and Sweaters steadily increased, while Accessories dropped drastically from 2000 to 2001. Let's try to find out why. To do this we will start by viewing the year 2000 by quarter to see if the problem occurred at a specific time of year.

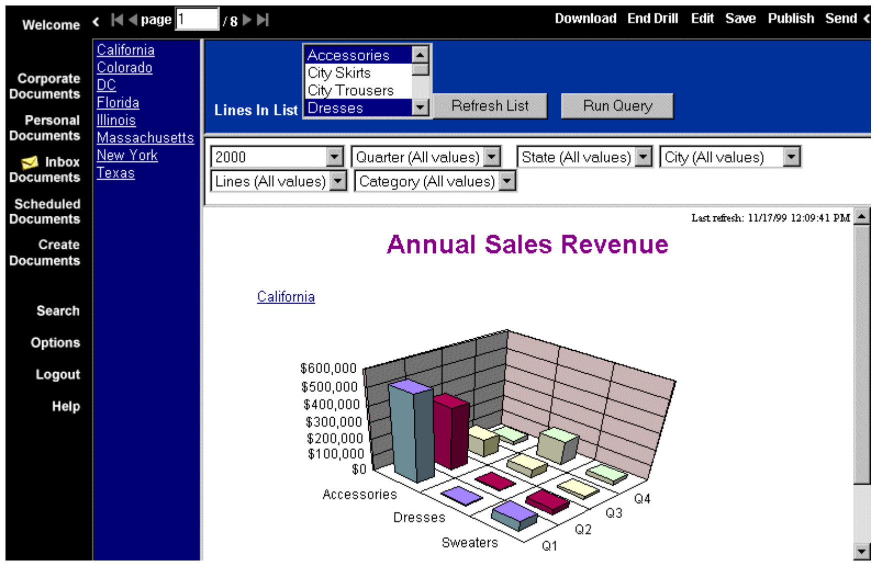
1. Place your cursor over 2000 on the chart axis.
You notice that the cursor changes. This indicates that element is drillable.

2. Click on 2000.

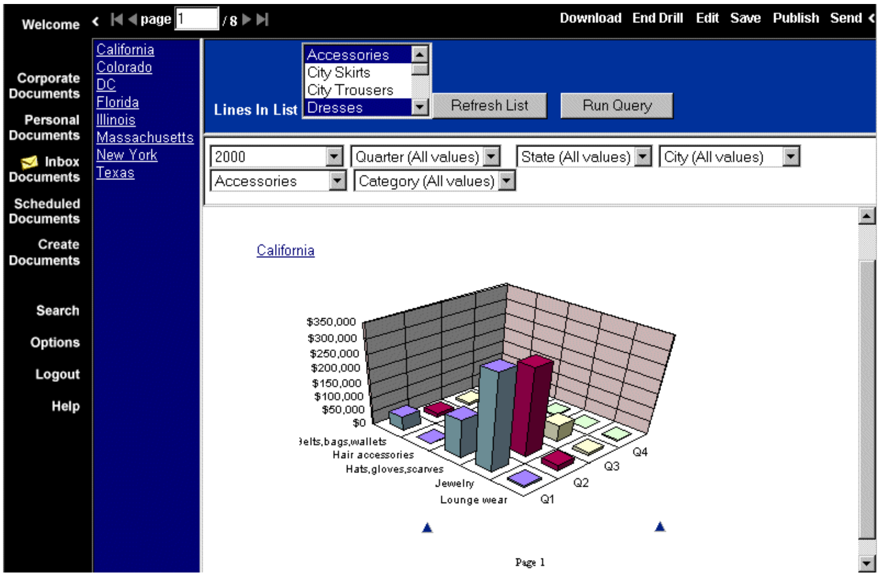


The chart dat is updated to show the results for each quarter in 2000. Here you see that Accessories did very well in the Q1 and Q2, but there was a steep drop in Q3, followed by a further drop in Q4. What happened in Q3?

Let's look more closely at the Accessories product line. If you hold your cursor over accessories on the chart axis you will see that the next level down is category. Let's see whether a specific category is responsible for the sharp drop in revenue.



3. Click on Accessories on the chart axis to view the categories within accessories.



From this view we can see that Jewelry, the top selling category in Q1 and Q2, went into a steep decline over the second half of the year. You want to analyze the jewelry line to find out the what caused the sharp decline in revenue, but you want to see the exact figures for the individual items. To do this, let's change the chart to a crosstab and drill on the data in the table.

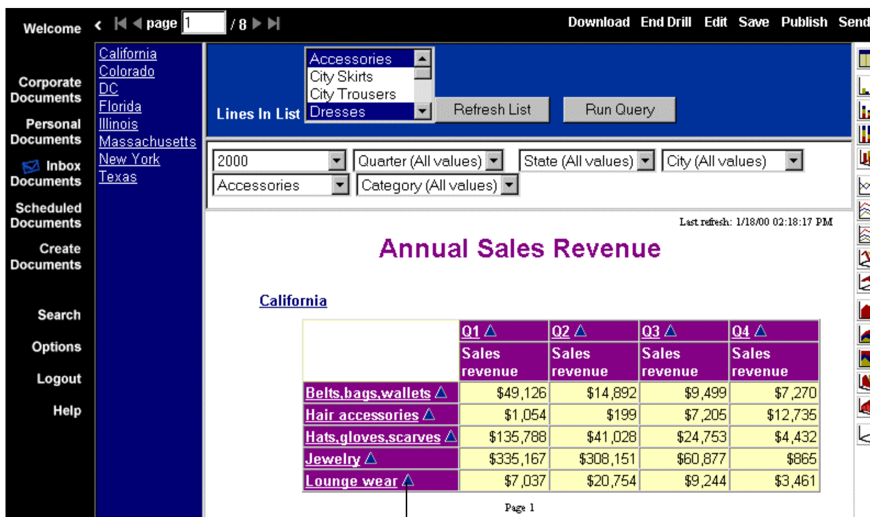
To change the chart to a crosstab:

1. Click the small white arrow to the right of Delete in the Document Results menu.

The chart menu bar appears.

2. Click the Turn to crosstab icon.

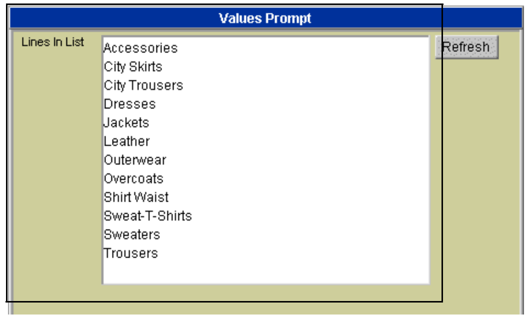
The chart converts to a crosstab and displays the exact figures for each product in the Accessories line.



The arrow points upward, indicating that this is the lowest level of detail in the document.

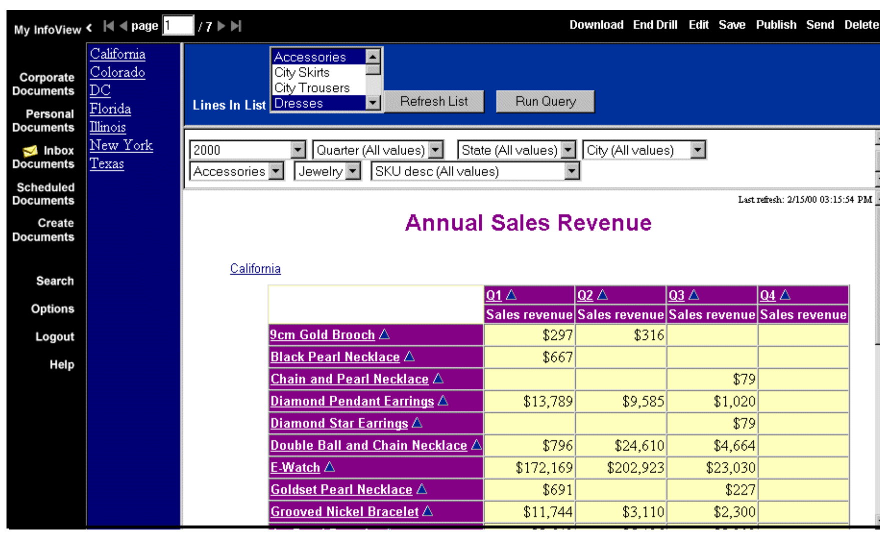
Now let's find out where the problem lies in the Jewelry line.

3. Click on Jewelry in the crosstab.
   A Values Prompt appears.



4. Select Accessories, Dresses, and Sweaters.

5. Click Run Query.

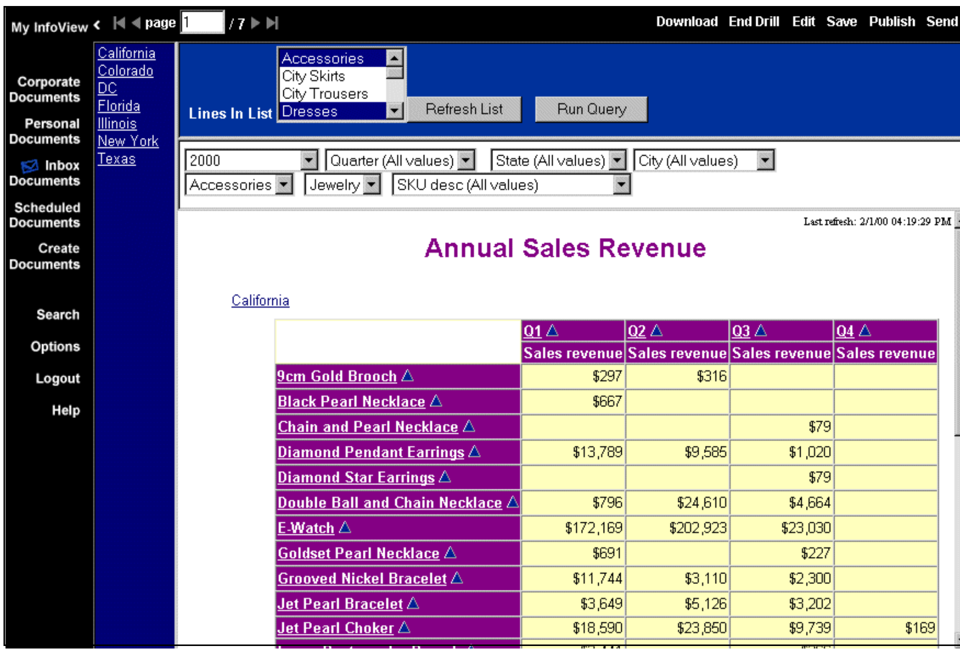


After analyzing the data in the crosstab, it is clear that the problem lies with the E-Watch line. Although this product sold extremely well in Q1 and Q2, there was a sharp decrease in sales in Q3 which continued through Q4.

Note: This might be a good time to send this document to the product manager for accessories to ask why the E-Watch lost so much revenue. To review the steps for sending a document, refer to "Send the Document to Another User" on page 34.

The Finished Document

You have created a well-organized document. Although it contains a chart with a lot of information it is manageable and easy to use. In the next lesson you learn how to send this document to your product managers so that they can plan better for next year by analyzing how their product performed this year.



Appendix A

Installing the Tutorial Sample Documents

In this appendix

Overview

This appendix explains how to install the sample documents necessary to follow this tutorial. This procedure is intended for the systems administrator and requires the use of SUPERVISOR and INFOVIEW.

Before You Begin

Before you copy the necessary documents, you must create a user profile in SUPERVISOR with the user name Student. For instructions on how to create a user profile with SUPERVISOR, refer to the *Supervisor's Guide*.

The Student user should have the rights to all WEBINTELLIGENCE functions, as well as the right to view and refresh BUSINESSOBJECTS documents.

Copy the Sample Files

1. Locate the demo documents. You can find the necessary demo documents in two places:

- WebITutorial folder on the product CD
- WebI_Getting_Started folder on the Documentation CD

Note: If you do not have access to either of these cd's, contact your system administrator.

2. Select the following six documents.

- lesson1.wqy
- lesson2.wqy
- lesson3.wqy
- lesson4.wqy
- lesson5.wqy
- lesson6.wqy

3. Copy the documents to the student user folder on the server, located by default at:
C:\Program Files\Business Objects\server\WebIntelligence 2.x
\storage\user\student

These documents will now appear in the Personal Documents list when you log into INFOVIEW as Student.

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