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# WebIntelligence

## Creating Documents



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## Lesson Objective

To create reports using BusinessObjects' WebIntelligence and become familiar with its features in order to edit reports.

### For Assistance

For assistance with any questions regarding the use of your PC, call the Computing & Information Services Help Desk and Dispatch Services at 862-4242, or send e-mail to [questions@unh.edu](mailto:questions@unh.edu).

For further assistance:

| <i>with</i> | <i>contact</i>   | <i>e-mail address</i>  |
|-------------|--|--|
| Browser     | CIS Help Desk 862-4242   | <a href="mailto:questions@unh.edu">questions@unh.edu</a>                         |
| Accounts    | WebIntelligence Security Manager<br><a href="mailto:web.intelligence.security@unh.edu">web.intelligence.security@unh.edu</a> |  |
| Documents   | USNH WebIntelligence Help  | <a href="mailto:web.intelligence.help@unh.edu">web.intelligence.help@unh.edu</a> |

## Selecting the Document Editor

There are four options for creating WebIntelligence documents:

1. Full Java applet
2. Light Java applet
3. ActiveX control
4. Optimized for my browser (This selection uses the option best suited for your browser. ActiveX will be selected for Internet Explorer and Full Java will be selected for all other browsers.)

**Full Java applet is recommended. These instructions are based on using this option.**

To select a document editor:

| What you do...                              | Comments/Prompts   |
|---|--|
| 1. Click OPTIONS in the navigation bar.     | The Options page will open.  |
| 2. Click the CREATE AND EDIT DOCUMENTS tab. |  |
| 3. Select WEBINTELLIGENCE.                  |  |
| 4. Select FULL JAVA APPLET.                 | Full Java is recommended and is used exclusively throughout this document. |
| 5. Click APPLY ALL CHANGES.                 |  |

**► Personal Options**

Start Page
Document Lists
Create and Edit Documents
View Documents
Universe
Password

Choose what type of document you want to create. For WebIntelligence, you can choose from several web panels.

WebIntelligence

Choose the type of Web Panel you want to use to create and edit WebIntelligence documents. For descriptions of each Web Panel option, refer to the WebIntelligence Online User's Help.

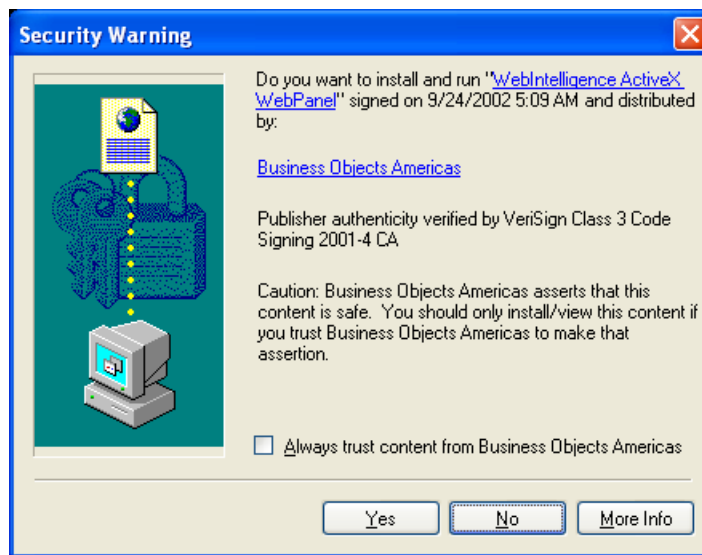
Full Java applet  
 Light Java applet  
 ActiveX control  
 Optimized for my browser

Reset This Form

Apply All Changes

## Security Warning Dialog Box

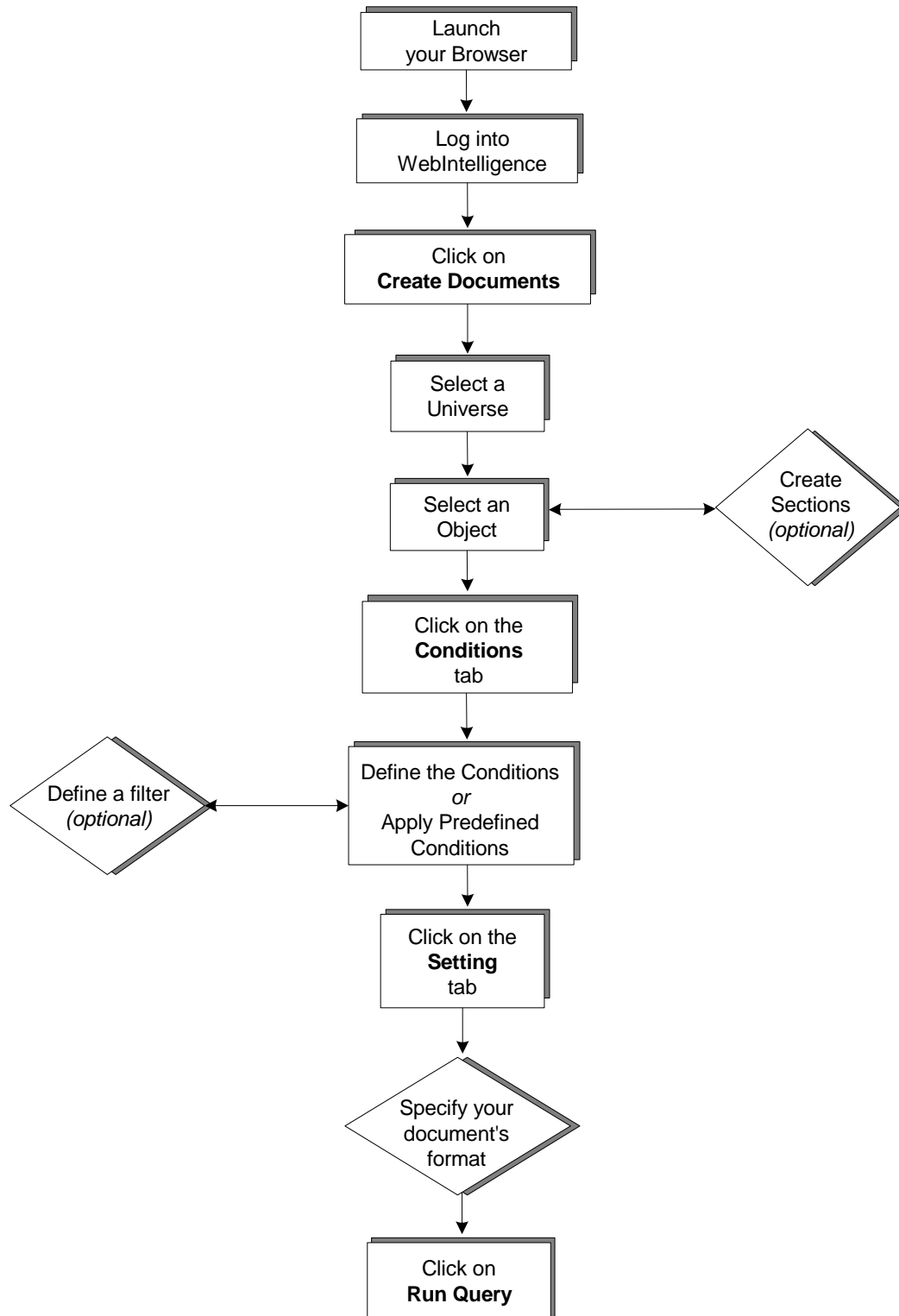
The first time you open the Web-Panel, and any time you use a different form of the Web- Panel for the first time, the following type of dialog box appears:



The type of Web-Panel you are opening is indicated as a hypertext link in the first paragraph. Click YES if you want to install the specified Web-Panel (applet or ActiveX control) on your machine. If you don't want to use this type of Web-Panel, click NO, and then specify another type on the Options page.



## Designing a Query: an overview



## Overview of Terms and Functions


**Concept** In order to create documents, it is important to understand how WebIntelligence organizes data. The two primary data mechanisms upon which WebIntelligence relies are **Universes** and **Queries**.

### A Universe is:

- A database containing Classes (tables) of logically grouped data
- A complete set of data and data operations, which can be accessed using everyday terms. You do not have to write computer programs, such as S1032, SQL, or RDBMS, in order to query the database.

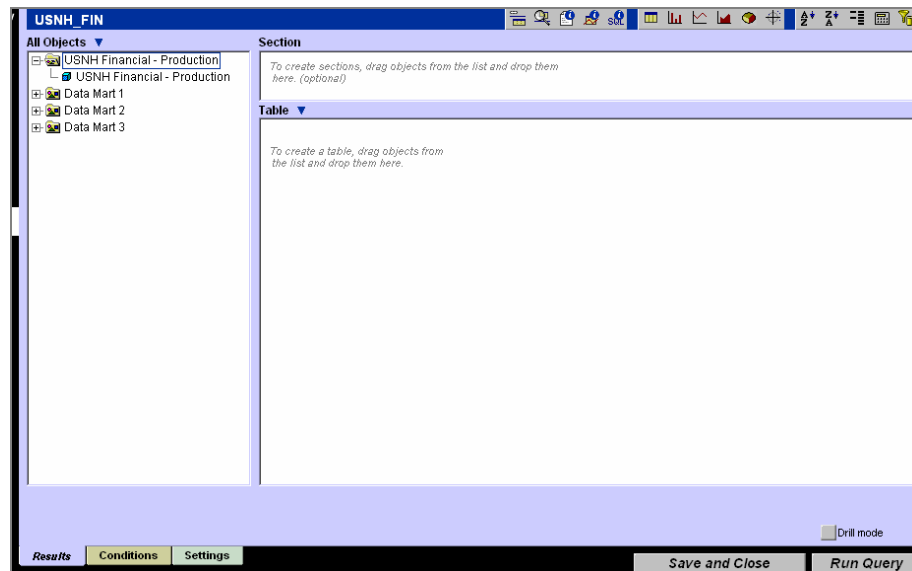
The Universe for the USNH Financial Data was designed by the MR2 Team. This Universe provides web access for USNH WebIntelligence users to the financial data.

| What you do...   | Comments/Prompts                            |
|--|---|
| 1. Launch VPN and browser.                                 |   |
| 2. Log into WebIntelligence.                               |   |
| 3. Click on CREATE DOCUMENTS.                              | A list of available universes is displayed. |
| 4. Click on the universe in which you will create reports. | The universe is displayed.                  |

| 28 Available universes. This list was last refreshed: <b>Nov 08 2004 14:00:33</b> .                                    |          |                      |
|--|----------|----------------------|
| Name ▲   | From     | Date                 |
|  <a href="#">USNH FIN</a> (USNHFIN) | Universe | Sep 01 2004 10:00:35 |

### The Web-Panel is:

- A program that runs in your browser and provides the query interface used to build and edit documents.
- The interface that lets you create a query for, and apply conditions/formatting to a document.
- The Web-Panel contains three tabs: RESULTS, CONDITIONS, and SETTINGS, which are used to design your document.



### A Query is:

- A question you design to retrieve specific data from the database.


### Building a Query

Use the RESULTS tab of the *Web-Panel* to begin designing your query.

To design a query, select one or more *Objects* from a *Class* within the *Universe* that contains the data you want to view. Put conditions on objects to limit the amount of data retrieved.

### **A Class is:**

- A table in a database.
- A logical grouping of Objects (fields).

In the Web-Panel, a Class is indicated by the  icon:

Examples of Classes in the USNH Financial Universe include:

- Time Dimensions
- Operating Ledger
- General Ledger
- Encumbrance Ledger

### **An Object is:**

- A field in a table in a database.
- A pointer to data in the database that enables you to retrieve data for your documents.

To **Expand** or **Compact** the list of Objects displayed within a class:

- Click the plus sign [+] next to a Class' icon to expand the list of Objects (fields) in the Class.
- Click the minus sign [-] next to a Class' icon to compact the list of Objects (fields) in the Class.

There are three (3) types of Objects: *Dimension*, *Detail* and *Measure*.

### **A Dimension Object is**

- A key field on which you are likely to base a query.
- A field, which typically retrieves character-type data or dates.


In the Web-Panel, a Dimension Object is indicated by the  icon:

Examples of USNH Dimension Objects include:

- Fiscal Year
- Fiscal Period
- Fund
- Organization
- Account
- Program
- Activity
- Location

**A Detail Object is:**

- A descriptive field which provides more specific information about a particular Dimension Object.
- To expand a list of objects to include Detail Objects, click the [+] next to a Dimension Object

In the Web-Panel, a Detail Object is indicated by the icon: 

Examples of USNH Detail Objects include:

- Fund Title
- Organization Title
- Account Title

**A Measure Object is:**

- A field which displays numeric data whose values change based upon the Objects with which it is used.

In the Web-Panel, a Measure Object is indicated by the icon: 

Examples of USNH Measure Objects include:

- YTD Activity
- YTD Encumbrances
- YTD Reservations
- PTD Activity
- PTD Encumbrances
- PTD Reservations

Since Measure Objects are dynamic, the value that is returned from a Measure is dependent upon the Object with which it is used.

For example:

| <u>Dimension Objects</u> |              |         | <u>Measure</u> |
|--------------------------|--------------|---------|----------------|
| Fund                     | Organization | Account | YTD Activity   |
| 9U0000                   | YCFO10       | 7111    | \$14,990.87    |

| <u>Dimension Objects</u> |              | <u>Measure</u> |
|--------------------------|--------------|----------------|
| Fund                     | Organization | YTD Activity   |
| 9U0000                   | YCFO10       | \$218,823.97   |

In this example, the value returned by the Measure Object (YTD Activity) automatically corresponds to the Dimension Object(s) chosen.

## Results Tab

The screenshot displays the 'Results Tab' for 'USNH\_FIN'. The interface is divided into several sections:

- Header:** 'USNH\_FIN' with a toolbar containing icons for search, refresh, and other functions.
- All Objects:** A tree view showing the following structure:
  - USNH Financial - Production
    - USNH Financial - Production
    - Data Mart 1
      - Time Dimension
      - Non-Hierarchical FOAPAL
      - Non-Hierarchical Attributes
      - Hierarchical FOAPAL
      - Hierarchical Attributes
      - General Ledger
      - Operating Ledger
      - Encumbrance Ledger
      - Grant Reporting
    - Data Mart 2
    - Data Mart 3

- Section:** A text area with the instruction: "To create sections, drag objects from the list and drop them here. (optional)".
- Table:** A text area with the instruction: "To create a table, drag objects from the list and drop them here.".
- Data Mart 1:** A label for the selected data mart.
- Drill mode:** A checkbox labeled 'Drill mode'.
- Footer:** A navigation bar with tabs for 'Results', 'Conditions', and 'Settings', and buttons for 'Save and Close' and 'Run Query'.

## The Results Tab

The RESULTS tab of the Web-Panel allows you to:

- Add Objects to the document
- Sequence the appearance of data
- Add breaks, sorts and calculations
- Specify the document type

The RESULTS tab has three panes:

### 1) *All Objects (Classes and Objects)*

Displays all of the Classes and Objects available within the Universe.

Clicking the [DOWN ARROW] next to *All Objects* displays a drop-down box, which limits the Objects that are displayed. The display can be limited to *Hierarchies* or *Queries Objects*. The default is *All Objects*.

### 2) *Table Pane*

Add or remove Objects to establish which fields will be displayed and in what order the information appears on the report.

### 3) *Section Pane*

Used for breaking a document's results into sub-sections.

Clicking the [DOWN ARROW] next to the block type name displays the Block Type dialog box for that group type.

## Using the Table Pane to Select Objects for a Query

**Concept** When you run a query, WebIntelligence contacts the database and retrieves data which meets your criteria, and displays that data in your browser.

| What you do...  | Comments/Prompts  |
|---|---|
| 1. Drag and drop Objects from the <i>All Objects</i> pane,<br><p style="text-align: center;"><b>OR</b></p> Double click on the desired Objects.   | Selected Objects will appear in the Table pane.   |
| 2. To rearrange Objects: Drag and drop Objects in the <i>Table</i> pane to change their order.  | The order in which you place Objects in the Table pane determines the order in which columns of data will be displayed.       |
| 3. To remove Objects: Drag and drop unwanted Objects to the <i>All Objects</i> pane,<br><p style="text-align: center;"><b>OR</b></p> Select the unwanted Object and press the DELETE key. | If available, a description of the selected Object will display on the bottom left side of the page above the selection tabs. |
| 4. Click on RUN QUERY on the bottom right corner.   | WebIntelligence builds a SQL statement to access the database and returns the data you requested.                             |

**NOTE:** By default, the order of the Objects determines the order in which results are sorted. Therefore, data is sorted by the first Object in the Table pane, followed by the second Object, then the third, etc.



**NOTE:** If the query was too general, i.e. requested too much data, WebIntelligence displays the alert icon (seen at left) on the toolbar. This icon indicates that only partial data was returned.

**NOTE:** Cancel a query at any time by clicking CANCEL QUERY at the bottom right of the page.



**Table** ▼


*To begin a crosstab, drag an object from the list and drop it here. (optional)*

Fiscal Year

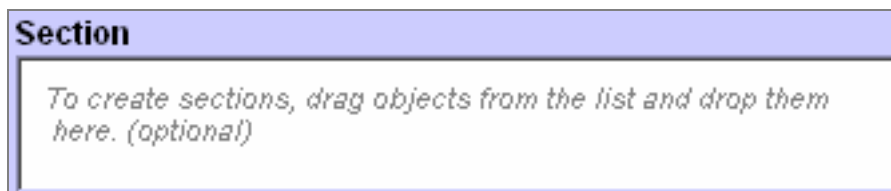
Fiscal Period

## Using the Section Pane to Break the Results into Sections

**Concept** Breaking a document into sections is a way of splitting large blocks of data into smaller, more comprehensible parts. Each section contains at least one block, and at least one section cell. To create a section, insert an Object into the Section panel.

| What you do...  | Comments/Prompts   |
|---|--|
| 1. Click on the SHOW/HIDE SECTIONS button  to display the Section panel. | <b>Omit this step if the Section panel is already visible.</b>   |
| 2. Drag and drop Objects into the section panel.  | For each of these Objects, a separate section will be created. <b>Only one section Object will appear inside each section.</b> The block will display data that relates to the section Object. |
| 3. Click on RUN QUERY <i>OR</i> APPLY FORMAT to generate the document.  |  |

NOTE: To create a document with multiple sections, repeat step 2 above.



## Editing a Document

**Concept** You may need to refine your WebIntelligence document after you have run a query.

| What you do...  | Comments/Prompts |
|---|------------------|
| <ol style="list-style-type: none"> <li>1. If you have run the query and are viewing data, click on <b>EDIT</b> on the toolbar,<br/><br/><b>OR</b><br/>If you are viewing a documents page in expanded mode, click on the document's <b>Edit</b> link.</li> <li>2. Make additions, changes and deletions as necessary.</li> <li>3. Choose <b>Rerun Query</b> or <b>Apply Format</b> to review the report.</li> </ol> |                  |

**NOTE:** You can edit WebIntelligence documents from any of the Documents pages (Inbox, Personal, or Corporate). Any changes to a Corporate Document must be saved as a Personal Document. Business Objects documents cannot be edited.

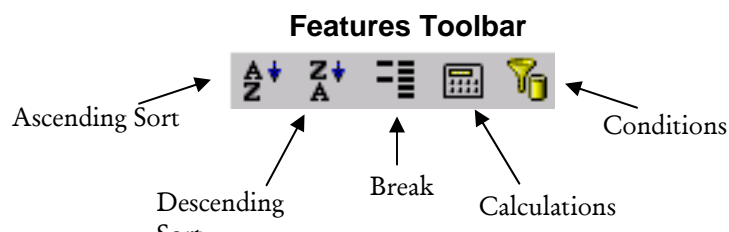
## Save and Close vs. Apply Format vs. Run Query

Note the three buttons in the bottom right corner **SAVE AND CLOSE**, **APPLY FORMAT** and **RUN QUERY**.

- Use **SAVE AND CLOSE** when you need to close the Web-Panel and only save the structure of the report with no data. A message will appear stating, “This report was saved with no data. Click Refresh to retrieve the data.” Select the Save link from the toolbar to save the document as usual.
- Use **APPLY FORMAT** when applying formatting changes to the document using existing data. This is a quick process because you are manipulating data you already have in your browser.  
**NOTE:** If you change any data needed for the document, Apply Format will no longer be available on the Web-Panel.
- Use **RUN QUERY** when you need to retrieve new data. This is a longer process because the server must be contacted and new data loaded into your browser.

## Features Toolbar

**Concept** You can add sorting orders, breaks, and calculations as well as text formatting to design the look of your results. The buttons on the Features toolbar are known as **Command Buttons**.



## Adding a Format to an Object from the Results Tab

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Select the Object from the <i>Table</i> or <i>Section</i> pane. Click on the appropriate command button from the <i>Features Bar</i> ,<br>OR<br>Drag and drop the appropriate command button from the <i>Features Bar</i> to the object. |                  |



## Removing a Format from an Object from the Results Tab

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Select the command button attached to the Object, press the DELETE key,<br>OR<br>Drag the COMMAND button from the object. |                  |

## Sorting

### Concept

Sorts are used to control the order in which the data appears in the document. A sort can be applied to any object. Objects can be sorted ascending or descending (*refer to the chart below.*) When you apply sorting to your objects, each SORT button will display a number that indicates the order in which the sorts will be completed.

|   |                   | <b>Text</b> | <b>Numbers</b>    | <b>Dates</b>    |
|---|-------------------|-------------|-------------------|-----------------|
|  | <b>Ascending</b>  | A-Z         | Lowest to Highest | Past to Present |
|  | <b>Descending</b> | Z-A         | Highest to Lowest | Present to Past |

NOTE: In Ascending, numbers will sort *before* letters.

## Changing the Sort Order

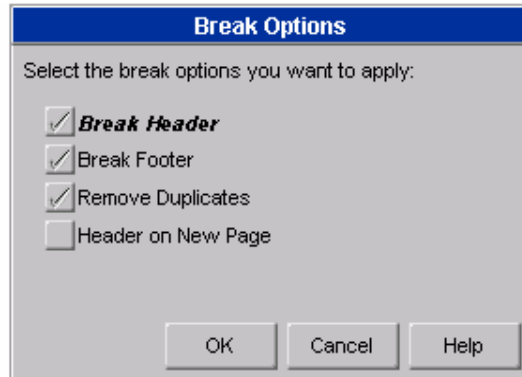
| <b>What you do...</b>   | <b>Comments/Prompts</b>                     |
|---|---|
| 1. Use drag and drop to move the SORT button onto the appropriate Object. | Remove the SORT button if no longer needed. |

NOTE: To change from ascending to descending sort, or vice versa, double click on the Object's SORT button.

## Using Breaks

**Concept** Breaks allow rows of a report to be grouped on the basis of common values. Once a break has been attached to an Object, break options can be changed. Breaks – when used in conjunction with calculations – are useful in producing sub-totals within a report.

NOTE: You cannot apply a break to an object in the *Section* pane.



| What you do...                                       | Comments/Prompts |
|--|------------------|
| 1. Double click on the Object's <b>BREAK</b> button. |                  |
| 2. Select Break options to be applied.               |                  |
| 3. Click OK.   |                  |

### Break Options:

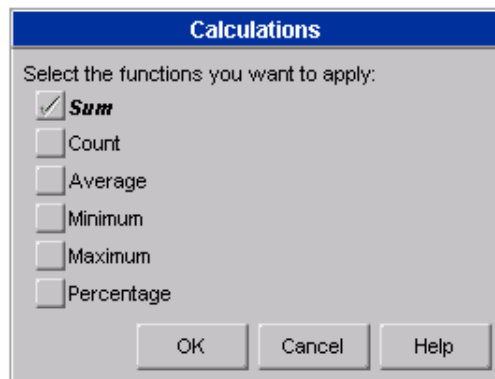
- **Break Header** – inserts row and/or column headers for each table or cross tab block created by the break. This option is checked by default.
- **Break Footer** – inserts a blank row or column at the end of each table or cross tab block created by the break. This option is checked by default.
- **Remove Duplicates** – removes all duplicate values from the data to which the break is applied, so that each value is only shown once. This option is checked by default.
- **Header on New Page** – inserts the break header on each new page, if the table or cross tab extends over more than one page.

You can apply breaks to more than one Object. When you add breaks to multiple Objects, you will have primary level breaks, secondary level breaks, etc., indicated by a subscript on the BREAK button.

## Using Calculations

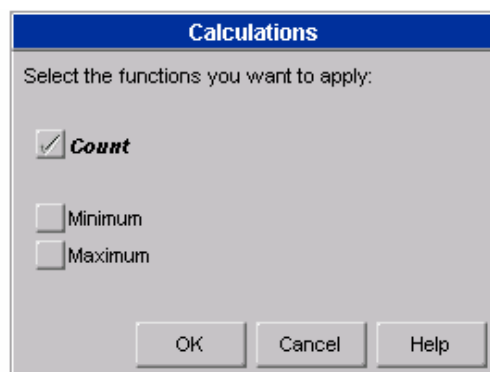
**Concept** This feature allows quick calculations to be made using a document's data. Once a calculation is attached to an object, the type of calculation can be changed. The list of available choices will differ depending on whether the object has a numerical or a non-numerical value. The default setting is **Sum** for a numerical value and **Count** for a non-numerical value.

### Numerical Values



- Sum - displays the total sum for a row or column
- Count - displays the total number of items returned
- Average - displays the average value
- Minimum - displays the minimum value
- Maximum - displays the maximum value
- Percentage - displays the value as a percentage

### Non-numerical Values



Count – displays the total number of items returned

Minimum – displays the minimum value alphabetically

Maximum – displays the maximum value alphabetically



## Formatting the Type of Calculation to be Performed

| What you do...   | Comments/Prompts |
|--|------------------|
| <ol style="list-style-type: none"><li>1. Double-click on the object's CALCULATION button.</li><li>2. Select function to be applied.</li><li>3. Click OK.</li></ol> |                  |

NOTE: You *cannot* make a calculation on objects in the *Section* pane.

## The Conditions Tab

**Concept** The CONDITIONS tab of the Web-Panel allows you to add conditions and/or filters to the document.

The CONDITIONS tab has three panes:

1) *All Objects pane (Classes and Objects)*

- Displays all the Classes and Objects available within the Universe.
  - Clicking the [DOWN ARROW] next to All Objects displays a drop-down box, which limits the Objects that are displayed. The display can be limited to **Hierarchies** or **Queries Objects**. All Objects is the default.

2) *Query Conditions pane*

- Used to add or change a condition to a query.

3) *Document Filters pane*

- Used to add or change a filter to a query.

**USNH\_FIN**

**All Objects** ▼

- [-] USNH Financial - Production
  - [-] USNH Financial - Production
- [+] Data Mart 1
- [+] Data Mart 2
- [+] Data Mart 3

**Query Conditions**

*Drag predefined conditions or objects from the list and drop them here.*

**Document Filters**

*Drag objects from the list and drop them here.*

FUND CODE: A code which uniquely identifies a fiscal entity.

Results   Conditions   Settings   Save and Close

## Conditions vs. Filters

The CONDITIONS tab has three sections: *All Objects*, *Query Conditions*, and *Document Filters*. Applying conditions or filters to a query allows only the desired data to be included. Instead of viewing a document with a large quantity of data, only the information needed is selected for display. Applying conditions and filters to a report can impact on calculations. Although conditions and filters are added to a document in the same way, functionally they restrict data differently.

### Condition

A condition is applied to a query to limit the data retrieved from the database. All data from the query is displayed with no restrictions. A condition restricts future users to only be able to work with data that is originally retrieved with the document. If the document is sent to another user, it will limit the information that can be viewed.

### Filter

A filter is applied to data returned when the document is opened. You may not want to display all of the data returned and want to focus on only a portion, which is difficult to do if there is a large amount of data on the screen.

A filter allows you to hide data you do not want to view behind the scenes and display only the data you need at that time. Only users with the ability to create reports can add a filter to a report.

| IN ORDER TO:  | USE:        |
|---|-------------|
| Restrict the data retrieved from the database when a query is run | A Condition |
| Restrict the data displayed in the document                       | A Filter    |

NOTE: When entering data for conditions and filters, enter values in the same case (upper or lower) as they are stored in Banner.

## Applying Pre-defined Conditions

**Concept** A pre-defined condition is a condition that was written by the MR2 Team for your use. Pre-defined conditions are conditions that are frequently used. When available, pre-defined conditions are displayed in the *All Objects* panel on the CONDITIONS tab of the Web-Panel. You *cannot* modify a pre-defined condition. If it does not provide the data you require, you will need to create your own condition.

## Using a Pre-defined Condition

### What you do...

### Comments/Prompts

1. Drag and drop the Condition Object from the All Object panel to the Query Conditions or Document Filter panel,

**OR**

Double-click the Condition Object in the All Object panel to add it to the Query Conditions panel.

2. Click on RUN QUERY.
-

## Creating User-defined Conditions

Each condition is named after the Object to which the Condition is being applied.

*Conditions* have three parts:

- 1) **Object:** the field of data to be queried
- 2) **Operator:** the relationship between the Object and the Operand (i.e. how WebIntelligence should test the data)
- 3) **Operand:** the value(s) which the data should be tested against

| CONDITION                | OPERATOR                              | OPERAND   |
|--------------------------|---------------------------------------|---|
| Equal To                 | Are equal to                          | An alphanumeric value   |
| Different From           | Are different from                    | An alphanumeric value   |
| Greater Than             | Are greater than                      | An alphanumeric value   |
| Greater Than Or Equal To | Are greater than or equal to          | An alphanumeric value   |
| Less Than                | Are less than                         | An alphanumeric value   |
| Less Than Or Equal To    | Are less than or equal to             | An alphanumeric value   |
| Between                  | Are between                           | Two alphanumeric values which are included in the results     |
| Not Between              | Are not between                       | Two alphanumeric values which are not included in the results |
| In List                  | Are in a list consisting of           | One or more alphanumeric value(s)                             |
| Not In List              | Are not in a list consisting of       | Two or more alphanumeric values                               |
| Is Null                  | Are null                              | No value required   |
| Is Not Null              | Are not null                          | No value required   |
| Matches Pattern          | Contain a pattern specified by        | An alphanumeric value and a wildcard                          |
| Does Not Match           | Do not contain a pattern specified by | An alphanumeric value and a wildcard                          |
| Both                     | Are both                              | Two alphanumeric values                                       |
| Except                   | Are any value but                     | An alphanumeric value   |

Following is an example of limiting the data retrieved:

| [Object]    | [Operator]  | [Operand] |
|-------------|-------------|-----------|
| Fiscal Year | is equal to | 2002      |

## Applying Conditions

**Concept** A condition allows you to limit the data retrieved from the database. Choose one of the following methods to select an object to which you wish to apply a condition.

**NOTE:** When a condition has been applied to an Object, the Object's icon in the RESULTS tab displays a CONDITIONS button.

### Method 1: Applying a Condition from the Results Tab

| What you do...  | Comments/Prompts   |
|---|--|
| 1. In the <i>Section</i> or <i>Table</i> panes, select the Object to which you wish to apply the condition. |  |
| 2. Click on the CONDITIONS command button on the toolbar.   | The Object will automatically appear in the Query Conditions pane of the CONDITIONS tab.                               |
| 3. Click on the EQUAL TO to select a different Operator from a pull down list.                              | See the Table for operator definitions. The default operator is "Equal to". Click the dot to close the pull-down list. |
| 4. Click on '_' to select an Operand from the pull down list.   | See the next page for definitions. Click on the dot to close the pull down list.                                       |

OR

### Method 2: Applying a Condition from the Conditions Tab

| What you do...   | Comments/Prompts  |
|--|---|
| 1. Double click on the Object with which you are working from the <i>All Objects</i> pane. | You must choose the same Class that you chose on the Results page.<br>If you do not, no data or inaccurate data will be returned as a result of your query. |
| OR   |   |
| Drag and drop an Object from the <i>All Objects</i> pane to the Query CONDITIONS panel.    |   |
| 2. Click on the EQUAL TO to select a different Operator from a pull down list.             | See the Table for operator definitions. The default operator is "Equal to". Click the dot to close the pull-down list.                                      |

3. Click on ‘\_’ to select an Operand from the pull down list.

*See the next page for definitions.* Click on the dot to close the pull down list.



## Operand Definitions

### Enter a Constant

Enter a value in the space provided and press ENTER to “hard code” the chosen value into the query.

### Show List of Values

Choose from the list of existing values displayed and press ENTER to “hard code” the chosen value into the query.

**NOTE:** Hold down the CONTROL key to select multiple values from the list, if the operator allows multiple values.

### Prompt List of Values

Create a prompt for the user to choose from a list of pre-defined values. When the query is run, a dialog box containing a pull-down list appears and prompts the user to select a value from the list.

**NOTE:** When the query is run, you can hold down the CONTROL key to select multiple values from the list, if the operator allows multiple values.

### Enter a Prompt

Enter the prompt to be displayed when the query is executed and press ENTER. The user must enter a value to execute the query.

**NOTE:** When typing the prompts, you can order the prompts by numbering them.

For example, the following prompts were entered with leading numbers:

1. Enter the Fiscal Year
2. Enter the Fiscal Month
3. Enter the Fund
4. Enter the Organization

## Removing a Condition

**Concept** You may need to remove a Condition. Choose one of the following methods to remove an object's condition.

### Method 1: Removing a Condition from the Results Tab

| What you do...   | Comments/Prompts |
|--|------------------|
| <ol style="list-style-type: none"><li>1. Click on the Object to which the condition is applied.</li><li>2. Drag the CONDITION command button from the Object to the toolbar,<br/><b>OR</b><br/>Click on the CONDITION command button and press DELETE.</li></ol> |                  |

**OR**

### Method 2: Removing a Condition from the Conditions Tab

| What you do...   | Comments/Prompts |
|--|------------------|
| <ol style="list-style-type: none"><li>1. Click on the Object to which the Condition is applied.</li><li>2. Press DELETE.</li></ol> |                  |

## Applying Multiple Conditions

When you specify more than one Condition, the logical operator which determines the relationship between the conditions must be either *And* or *Or*. The default is *And*.

- Use *And* when both conditions must be met, producing narrower results.
- Use *Or* when at least one of the conditions must be met, producing broader results.

**NOTE:** To toggle between the *And* operator and the *Or* operator, double-click the OPERATOR button.

## Applying Brackets to Conditions (*Advanced Feature*)

**Concept** Brackets can be used to specify the order in which to execute conditions. In order to use brackets, at least three conditions must be applied.

**NOTE:** Conditions follow the same rules used in math equations. Functions within brackets will be completed first, and then all remaining functions are completed from top to bottom.

### Using Brackets with Conditions

| What you do...   | Comments/Prompts   |
|--|--|
| 1. Check for at least three conditions in the <i>Query Conditions</i> pane on the <b>CONDITIONS</b> tab. | To use brackets, at least three Conditions must be applied.                      |
| 2. Click the <b>AND</b> or <b>OR</b> operator button between the two conditions.                         |  |
| 3. Click the <b>SHIFT RIGHT</b> command button on the toolbar.   | A bracket is placed in front of the conditions, which are indented to the right. |

**NOTE:** Double click the **Operator** button to toggle it between *And* or *Or* operator.

### Removing a Bracket from Conditions

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on the <b>AND</b> or <b>OR</b> button between the bracketed Objects. |                  |
| 2. Click on the <b>SHIFT LEFT</b> command button on the toolbar.              |                  |

## Creating User-defined Filters

Each Filter is named after the Object to which the Filter is being applied.

Filters have three parts:

- 1) **Object:** the field of data to be queried
- 2) **Operator:** the relationship between the Object and the Operand (how WebIntelligence should test the data)
- 3) **Operand:** the value(s) which the data should be tested against

| FILTER                   | OPERATOR                              | OPERAND   |
|--------------------------|---------------------------------------|---|
| Equal To                 | Are equal to                          | An alphanumeric value   |
| Different From           | Are different from                    | An alphanumeric value   |
| Greater Than             | Are greater than                      | An alphanumeric value   |
| Greater Than Or Equal To | Are greater than or equal to          | An alphanumeric value   |
| Less Than                | Are less than                         | An alphanumeric value   |
| Less Than Or Equal To    | Are less than or equal to             | An alphanumeric value   |
| Between                  | Are between                           | Two alphanumeric values which are included in the results     |
| Not Between              | Are not between                       | Two alphanumeric values which are not included in the results |
| In List                  | Are in a list consisting of           | One or more alphanumeric value(s)                             |
| Not In List              | Are not in a list consisting of       | Two or more alphanumeric values                               |
| Is Null                  | Are null                              | No value required   |
| Is Not Null              | Are not null                          | No value required   |
| Matches Pattern          | Contain a pattern specified by        | An alphanumeric value and a wildcard                          |
| Does Not Match           | Do not contain a pattern specified by | An alphanumeric value and a wildcard                          |
| Both                     | Are both                              | Two alphanumeric values                                       |
| Except                   | Are any value but                     | An alphanumeric value   |

An example of limiting the data that is displayed:

[Object]    [Operator]    [Operand]

Fiscal Year is equal to 2002

NOTE: The ability to change values used in filters is only available to users with Create Documents capabilities.

## Using Filters

**Concept** A filter allows you to hide data you do not want to view behind the scenes and display only the data you need at that time. Only users with the ability to create reports can add a filter to a report. Choose one of the following methods to apply a Filter:

### Method 1: Applying a Filter from the Results Tab

| What you do...  | Comments/Prompts  |
|---|---|
| 1. In the <i>Section</i> or <i>Table</i> panes, select the Object to which you wish to apply the Filter.      |   |
| 2. Click on the CONDITIONS command button on your toolbar.  |   |
| 3. In the CONDITIONS tab, drag the object from the Query Conditions pane to the <i>Document Filters</i> pane. |   |
| 4. Click on the EQUAL TO to select an Operator from a pull-down list.   | <i>See the Table for operator definitions.</i><br>The default operator is equal to. Click on the dot to close the pull-down list. |
| 5. Click on '_' to select an Operand from a pull down list.   | <i>See the next page for definitions.</i> Click the dot to close the pull-down list.  |

OR

### Method 2: Applying a Filter from the Conditions Tab

| What you do...   | Comments/Pro  |
|--|---|
| 1. Click on the Class that contains the Object with which you are working.                       | You must choose the same Classes you chose on the Results page. If you do not, no data or inaccurate data will be returned as a result of your query. |
| 2. Drag and drop an Object from the <i>All Objects</i> pane to the <i>Document Filters</i> pane. |   |

|   |   |
|---|---|
| 3. Click on the EQUAL TO to select an Operator from a pull-down list. | <i>See the Table for operator definitions.</i><br>The default operator is equal to. Click on the dot to close the pull-down list. |
| 4. Click on ‘_’ to select an Operand from a pull down list.           | <i>See the next page for definitions.</i> Click the dot to close the pull-down list.  |

## Operand Definitions

### Enter a Constant

Enter a value in the space provided and press ENTER to “hard code” the chosen value into the query.

### Show list of values

Choose from the list of existing values displayed and press ENTER to “hard code” the chosen value into the query.

## Removing a Filter from the Conditions Tab

*Concept* You may need to remove a filter.

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on the Object to which the Filter is applied. |                  |
| 2. Press DELETE.                                       |                  |

## Applying Multiple Filters

When you specify more than one Filter, the logical operator which determines the relationship between the filters must be either *And* or *Or*. The default is *And*.

- Use *And* when both filters must be met, resulting in narrower results.
- Use *Or* when at least one of the filters must be met, resulting in broader results.

NOTE: To toggle between the *And* operator and the *Or* operator, double-click the OPERATOR button.

## Applying Brackets to Filters (*Advanced Feature*)

**Concept** Use Brackets to specify the order in which to execute the filters. You must have at least three filters in order to apply a bracket.

**NOTE:** Filters follow the same rules as used in math equations. Functions within brackets are completed first, and then all remaining functions are completed from top to bottom.

### Using Brackets with a Filter

| What you do...  | Comments/Prompts  |
|---|---|
| 1. Check for at least three filters in the <i>Docu-ment Filters</i> pane on the CONDITIONS tab. | To use brackets, at least three Filters must be applied.                      |
| 2. Click the AND or OR operator button between the two filters.                                 |   |
| 3. Click the SHIFT RIGHT command button on the toolbar.   | A bracket is placed in front of the filters, which are indented to the right. |

**NOTE:** Double click on the OPERATOR button to toggle between *And* or *Or* operator.

### Removing Brackets from Filters

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on the AND or OR button between the bracketed Objects. |                  |
| 2. Click on the SHIFT LEFT command button on the toolbar.       |                  |

## Using Wildcards

**Concept** Wildcards are special characters that are used to denote “any single unknown character” or “any number of unknown characters”.

Wildcards can only be used with the:

*Operator:*

*Matches Pattern*

or

*Does Not Match*

And

*Operand:*

*Enter a Constant*

or

*Enter a New Prompt*

\_ [underscore] = any single unknown character

% [percent] = any number of unknown characters (including none)



**NOTE:** Users must narrow a query prior to using a leading % [percent]. Otherwise, this could slow the query and return partial results.



## The Settings Tab

**Concept** The SETTINGS tab is the third tab in the Web-Panel. This tab contains a variety of options used to format a document. The settings options available vary depending on the section of the document that is selected. In this manual, the description for each group of settings is based on using the **Full Java applet**.

## Formatting the General Appearance of Your Results

| What you do...   | Comments/Prompts  |
|--|---|
| 1. Click on the SETTINGS tab                                 |   |
| OR   |   |
| Click on the DOCUMENT SETTINGS command button on the toolbar |  |
| OR   |   |
| Click on the BLOCK SETTINGS command button on the toolbar.   |  |

The sections of the preview area are:

|                      |  |
|----------------------|--|
| <b>Document Area</b> | Document – Sets the overall properties of the document.<br>Page Labels – Formats labels that appear on every page of the document.   |
| <b>Title Area</b>    | Title Block – Formats the alignment of the page title.<br>Title Cell – Formats the title itself (different than the Title Block setting).  |
| <b>Section Area</b>  | Section – Formats the alignment of the section heading on the document page.<br>Section Cell – Formats the section heading itself (different than the Section setting).<br>Index [Cell] – To be used if section headings have been set to be displayed as a hyperlinked index.                                     |
| <b>Block Area</b>    | Block - Sets the properties for the document's data blocks. Can be set for tabular or chart documents.<br>Cell – Formats the header or data of the cell.<br>Axis – Formats the axis and axis label of a chart (available only if a chart is being used and the axis of the chart in the display area is selected). |

## Common Settings for Page Label, Title Cell, Section Cell, Cell, and Index

### Color

Background – Select or change the background color from the drop-down list.

Text – Select or change the text color from the drop-down list.

### Alignment (These options are not available for Index.)

Vertical – Adjust the vertical alignment within the cell.

Horizontal – Adjust the horizontal alignment within the cell.

Wrap text – Check to automatically wrap the label to a new line if it exceeds the defined cell width. The default is checked.

Automatic size – Check to automatically adjust the width of the cell to the size of the text. The default is checked.

Cell width – Set the cell width here if the Automatic size option is not checked.

### Font

Name - Select the font type from the drop-down list.

Size - Select the font size from the drop-down list.

Style - Select the font style from the drop-down list. Regular is the default.

Strikethrough - Check to put a line through the text.

Underline - Check to underline the text.

## Common Settings for Title, Section, and Block

### Color

Background – Select or change the background color from the drop-down list. (This option is *not* available for Title.)

Border – Select or change the color of the border from the drop-down list. (This option is called Chart Wall in Chart.)

### Alignment

Indent – Set the amount of indentation.

Horizontal – Control the horizontal placement.

### Table (These options *not* available for Chart.)

Border – Change the thickness of the borderline.

Padding – Increase or decrease the spacing between the text and the border.

Spacing – Increase or decrease the spacing between the inner and outer borderlines.

## Document Settings

**Document Settings**

Image:

**Color**  
 Background:     Hyperlink:

**Document**  
 Drill mode  
 Show prompts within the report  
 Fetch duplicate rows  
 Avoid duplicate rows aggregation

**Limits**  
 Max. Rows Fetched:   
 Max. Fetch Time:   
 Row count / Page:

Document Title
Last refresh: <refresh\_date>

Sample Report

Section  
 <Fund>

Section  
 <FTVFUND\_TITLE>

Table

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

Page <page>

Results
Conditions 
Settings
Apply Format
Run Query

## Document Settings

**Concept** When you click the SETTINGS tab, document settings are displayed by default on the left side of the tab. This sets the overall properties of the document. If another settings group is selected, you can switch back to document settings by clicking the area outside other document elements in the preview area.

### Changing the Document Settings

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on DOCUMENT on the right side of the <i>Settings</i> panel,<br><p style="text-align: center;">OR</p> Click on the area outside of the report on the right side of the <i>Settings</i> panel,<br><p style="text-align: center;">OR</p> Click on the SHOW DOCUMENT SETTINGS command button on the toolbar. |                  |
| 2. Choose the format options from the left side of the <i>Settings</i> panel.   |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.  |                  |

#### Additional Setting Options:

Image – Display an image file on the document. *Not recommended.*

Add Page Header or Add Page Footer – Clicking this will display the page label settings.

Background – Select or change the background color for the entire document.

Hyperlink – Select or change the background color for the Hyperlink text.

Drill mode – Check to make the document drillable.

Show prompts within the document – Check to display all the prompts in a frame at the top of the document.

Fetch duplicate rows – Check to display records with duplicate values. The default is checked.

Avoid duplicate rows aggregation – Check to make sure that duplicate rows of data are not displayed.

Max. Rows Fetched – Limit the maximum number of rows to be fetched, check the option and enter a number. The default is checked with 15000 rows.

Max. Fetch Time – Limit the maximum number of seconds used to fetch the data, check the option and enter a number.

Row count/Page – Change the number of rows displayed per document page. Enter the new number. The default setting is 200 rows per page.

### Page Label Settings

**Page Label Settings**

Text: Page <page> [Remove Page Label]

**Color**  
 Background: Default [v] Text: Default [v]

**Alignment**  
 Vertical: Bottom [v] Horizontal: Center [v]  
 Wrap text Cell Width: [v]  
 Automatic size [v]

**Font**  
 Name: Default [v] Size: Auto. [v]  
 Style: Regular [v]  Strikethrough  
 Underline

Document Title: Last refresh: <refresh\_date>

**Sample Report**

Section: <Fund>

Section: <FTVFUND\_TITLE>

Table:

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

Page <page>

Results Conditions Settings [Apply Format] [Run Query]

## Page Label Settings

**Concept** You may want to alter the page label settings. This formats a label's color, alignment and font.

### Adding a Page Label

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on the page label in the document preview area.   |                  |
| 2. Click on the ADD PAGE HEADER or ADD PAGE FOOTER button from the left side of the <i>Settings</i> panel. |                  |
| 3. Choose the format options from the left side of the <i>Settings</i> panel.                              |                  |
| 4. Press APPLY FORMAT to apply/view settings without re-running the query.                                 |                  |

### Changing Page Label Settings

| What you do....   | Comments/Prompts |
|---|------------------|
| 1. Click on the page label in the document preview area.                        |                  |
| 2. Click on the label to change on the right side of the <i>Settings</i> panel. |                  |
| 3. Choose the format options from the left side of the <i>Settings</i> panel.   |                  |
| 4. Press APPLY FORMAT to apply/view settings without re-running the query.      |                  |

## Removing a Page Label

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on the label to delete on the right side of the <i>Settings</i> panel. |                  |
| 2. Click on the REMOVE PAGE from the left side of the <i>Settings</i> panel.    |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.      |                  |

NOTE: The default is to have the page numbering in the center footer and last refreshes date/time in the right-side header.

### Additional Setting Options:

Text – Enter the text to be used as the page label.

Remove Page Label – Click this button to delete the page label.

This page is intentionally left blank.



## Title Settings

**Title Block Settings**

Title: Sample Report

Color: Border: Default

Alignment: Indent: Horizontal

Table: Border: 0, Padding: 0, Spacing: 0

Sample Report

<Fund>

<FTVFUND\_TITLE>

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

Page: 1 page

Results Conditions Settings Apply Format Run Query

## Title Settings

**Concept** You may need to customize the Title settings. Options include changing the Title's location on the document page, changing the background color, and adding a border to the Title heading.

### Changing the Title Settings

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on TITLE on the right side of the <i>Settings</i> panel.          |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.  |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query. |                  |

#### Additional Setting Options

Title – Enter the text to be used as the Title.

### Adding a Title

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on TITLE on the right side of the <i>Settings</i> panel.                |                  |
| 2. Type the text into the textbox on the left side of the <i>Settings</i> panel. |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.       |                  |

## Title Cell Settings

The screenshot displays the 'Title Cell Settings' dialog box for a report titled 'Sample Report'. The dialog is divided into several sections for configuring the appearance of a table cell:

- Title:** Sample Report
- Color:** Background (Default), Text (Default)
- Alignment:** Vertical (Default), Horizontal (Default), Wrap text (checked), Cell Width (Automatic size)
- Font:** Name (Default), Size (Auto), Style (Regular), Strikethrough (unchecked), Underline (unchecked)

The preview area shows the following table structure:

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

At the bottom of the dialog, there are buttons for 'Results', 'Conditions', 'Settings', 'Apply Format', and 'Run Query'.

## Title Cell Settings

**Concept** You may need to customize the Title Cell settings. This formats the title itself, plus the back-ground color, alignment within the cell, and font settings. This is different than the Title setting options described above.

### Changing the Title Cell settings

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click the actual title in the preview area to change the title cell settings. |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.        |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.       |                  |

NOTE: Click in the **Title** area to return to title block settings.

#### Additional Setting Options

Title – Displays the Title text; can be modified.

## Section Settings

**Section Settings**

Show as index  
 Repeat on each page

**Color**  
 Background: Default  
 Border: Default

**Alignment**  
 Indent: 40  
 Horizontal: Default

**Table**  
 Border: 0  
 Padding: 0  
 Spacing: 0

**Section**  
 Start a new page for each section  
 Create footer calculations

**Sample Report**  
 Title: <Fund>  
 Section: <FTVFUND\_TITLE>  
 Table:  

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

 Page <page>

Results | Conditions | Settings | Apply Format | Run Query

## Section Cell Settings

**Section Cell Settings**

Show as index  
 Repeat on each page

**Color**  
 Background: Default  
 Text: Default

**Alignment**  
 Vertical: Default  
 Horizontal: Default  
 Wrap text  
 Automatic size  
 Cell Width: [dropdown]

**Font**  
 Name: Default  
 Size: Auto  
 Style: Regular  
 Strikethrough  
 Underline

**Sample Report**  
 Title: <Fund>  
 Section: <FTVFUND\_TITLE>  
 Table:  

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

 Page <page>

Results | Conditions | Settings | Apply Format | Run Query

## Section Settings

**Concept** You may want to alter the section settings. Options include formatting the Section's placement on the document page and the background color. You can also add a border to the section.

NOTE: Different formatting options can be applied to individual section headings.

## Changing the Section Settings

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on <b>SECTION</b> on the right side of the <i>Settings</i> panel.        |                  |
| 2. Choose format options from the left side of the panel.                         |                  |
| 3. Press <b>APPLY FORMAT</b> to apply/view settings without re-running the query. |                  |

### Additional Setting Options:

Show as index – Check this option to display the section headings as a hyperlinked index to the left of the block.

Repeat on each page – Select this option to display the section header title on each page.

Start a new page for each section – Check this option to display each section on a separate page.

Create footer calculations – Check this option to add a calculation footer to the bottom of the table.

## Section Cell Settings

**Concept** You may want to alter the section cell settings. Options include formatting the section heading, background color, alignment within the cell, and font settings. This is different than the Section settings described above.

NOTE: Different formatting options can be applied to individual section headings.

## Changing the Sections settings

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on section header (enclosed in < >) on the right side of the <i>Settings</i> panel. |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.                    |                  |

3. Press APPLY FORMAT to apply/view settings without re-running the query.
-

## Index Settings

The screenshot displays the 'Index Settings' window. On the left, there are three main sections: 'Show as index' with checkboxes for 'Show as index' (checked) and 'Repeat on each page' (unchecked); 'Color' with dropdowns for 'Background' and 'Text', both set to 'Default'; and 'Font' with dropdowns for 'Name' (Default) and 'Size' (Auto), and checkboxes for 'Strikethrough' and 'Underline' (both unchecked). The 'Values' section is currently empty. The main preview area shows a 'Sample Report' with a table. The table has a header row with columns: 'Organization', 'Organization Title', 'Account', 'Account Title', and 'Ytd A'. The data row contains placeholders: '<Organization>', '<FTVORGN\_TITLE>', '<Account>', '<FTVACCT\_TITLE>', and an empty cell. The interface also includes a 'Results' tab, a 'Conditions' icon, a 'Settings' tab, and 'Apply Format' and 'Run Query' buttons at the bottom.

| Organization   | Organization Title | Account   | Account Title   | Ytd A |
|----------------|--------------------|-----------|-----------------|-------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> |       |



## Index [Cell] Settings

**Concept** If the section headings are set to display as a hyperlinked index, this formats the font, style and color of the text, and its background color.

## Changing the Index [Cell] settings

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on <b>INDEX SECTION</b> (enclosed in < >) in the column to the left of the preview block on the right side of the <i>Settings</i> panel. |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.   |                  |
| 3. Press <b>APPLY FORMAT</b> to apply/view settings without re-running the query.   |                  |

## Block Settings

The screenshot shows the 'Block Settings' window for a 'Sample Report'. The left sidebar contains settings for Color, Alignment, Table, and Header. The main area displays a report structure with sections for '<Fund>' and '<FTVFUND\_TITLE>', followed by a table.

**Table Data:**

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

At the bottom of the window, there are buttons for 'Results', 'Conditions', 'Settings', 'Apply Format', and 'Run Query'.

## Chart Settings

The screenshot shows the 'Chart Settings' window for a 'Sample Report'. The left sidebar contains settings for Color, Alignment, Size, and Chart. The main area displays a report structure with sections for '<Fund>' and '<FTVFUND\_TITLE>', followed by a grouped bar chart.

**Chart Data:**

The chart is a 'Grouped Bar Chart' titled 'Ytd Activity'. The y-axis is labeled 'Ytd Activity' and has a '0.00' tick mark. The x-axis is labeled '<Organization / FTVORGN\_TITLE / Account / FTVACCT\_ Organization / FTVORGN\_TITLE / Account / FTVAC'.

The chart displays four groups of bars. Each group contains two bars: a red bar and a light green bar. The heights of the bars increase from left to right across the groups.

At the bottom of the window, there are buttons for 'Results', 'Conditions', 'Settings', 'Apply Format', and 'Run Query'.

## Block Settings

**Concept** Block Settings sets the properties for the document's data blocks and the cells within a particular block. They can be set for tabular or chart documents. Many block settings depend on the type of document being formatted. Therefore, the options described below will not all be seen at the same time.

If formatting a table, the preview area is labeled Table, and the block settings area contains table header options. However, if formatting a chart, the block settings area contains options for displaying walls or a floor with the bar.

## Changing the Block Settings

| What you do...   | Comments/Prompts  |
|--|---|
| 1. Click on BLOCK NAME on the right side of the <i>Settings</i> panel<br><b>OR</b><br>Click on the BLOCK SETTINGS command button on the toolbar. | Settings change to block settings or chart settings. This group of options formats the placement of the body of the data (which can be a table or chart) on the document page, the background color and a border. |
| 2. Choose format options from the left side of the <i>Settings</i> panel.  |   |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.   |   |

### Additional Setting Options:

#### Block settings for tabular documents (Table, Financial, Form or Cross tab)

Each new block - Displays the header only at the top of each new block (*not* available for Form.)

Each row - Displays the header above each row of data in the document (*not* available for Form or Cross tab.)

#### Block settings for chart documents

Width - Changes the width of the chart.

Height - Changes the height of the chart.

Chart options (available for non-3 dimensional charts only):

3D Look - Gives the chart a 3D look.

Zero-based Axis - Forces the axis to start at zero (*not* available for pie, doughnut, polar, and scatter charts.)

Flip horizontal/vertical - Flips the horizontal and vertical axes (*not* available for pie, doughnut, polar, and scatter charts.)

Axis Legend - Displays the legend box. Default setting is none, except for pie and doughnut, which is vertical (available for 3 dimensional charts only.)

- Show floor – Displays the chart floor; selected by default.
- Show left wall – Displays a left wall with the chart; selected by default.
- Show right wall – Displays a right wall with the chart; selected by default.

## Header Cell Settings

**Cell Settings**

Header: Organization  
 On Left  On Top

**Color**

Background: Default | Text: Default

**Alignment**

Vertical: Default | Horizontal: Default

Wrap text | Cell Width: [Slider]  
 Automatic size

**Font**

Name: Default | Size: Auto  
 Style: Regular |  Strikethrough  Underline

Document Title: Sample Report  
 Last refresh: <refre

Section: <Fund>

Section: <FTVFUND\_TITLE>

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

Page <page>

Results Conditions Settings Apply Format Run Query

## Data Cell Settings

**Cell Settings**

On Left  On Top

**Color**

Background: Default | Text: Default

**Alignment**

Vertical: Default | Horizontal: Default

Wrap text | Cell Width: [Slider]  
 Automatic size

**Font**

Name: Default | Size: Auto  
 Style: Regular |  Strikethrough  Underline

Document Title: Sample Report  
 Last refresh: <refre

Section: <Fund>

Section: <FTVFUND\_TITLE>

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |

Page <page>

Results Conditions Settings Apply Format Run Query



## Cell Settings

**Concept** You may want to change the Cell settings. Options include formatting the background color, cell alignment, and font settings.

### Changing a Header Cell Setting

| What you do...   | Comments/Prompts |
|--|------------------|
| 1. Click on HEADER CELL on the right side of the <i>Settings</i> panel.    |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.  |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query. |                  |

NOTE: The header box appears only when a header cell is selected. A new name can be typed in the header box to change the existing header.

### Changing a Text Data Cell Setting

| What you do...  | Comments/Prompts |
|---|------------------|
| 1. Click on DATA CELL (enclosed in < >) on the right side of the <i>Settings</i> panel. |                  |
| 2. Choose format options from the left side of the <i>Settings</i> panel.               |                  |
| 3. Press APPLY FORMAT to apply/view settings without re-running the query.              |                  |

## Numeric Data Cell Settings

The screenshot shows the 'Cell Settings' dialog box for a report. The dialog is divided into several sections for configuring the appearance of the selected cell:

- Format:** Set to 'Custom'. Includes checkboxes for 'On Left' and 'On Top'.
- Color:** Options for 'Background' and 'Text', both set to 'Default'.
- Alignment:** Options for 'Vertical' and 'Horizontal', both set to 'Default'. Includes checkboxes for 'Wrap text' and 'Automatic size'.
- Font:** Options for 'Name' (Default), 'Size' (Auto), 'Style' (Regular), and checkboxes for 'Strikethrough' and 'Underline'.

The main preview area shows a 'Sample Report' with the following structure:

- Title:** Sample Report
- Section:** <Fund>
- Section:** <FTVFUND\_TITLE>
- Table:**

| Organization   | Organization Title | Account   | Account Title   | Ytd Activity |
|----------------|--------------------|-----------|-----------------|--------------|
| <Organization> | <FTVORGN_TITLE>    | <Account> | <FTVACCT_TITLE> | 0.00         |
- Page:** Page <page>

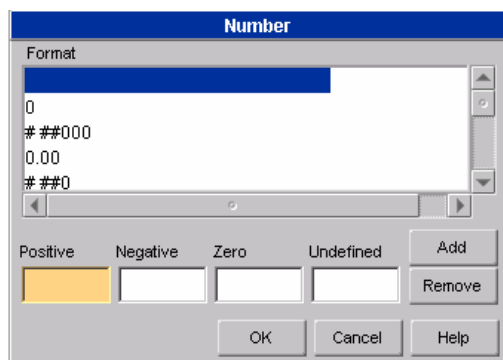
At the bottom of the dialog, there are tabs for 'Results', 'Conditions', and 'Settings'. The 'Settings' tab is active. Buttons for 'Apply Format' and 'Run Query' are located at the bottom right.

## Changing a Numeric Data Cell Setting

| What you do...  | Comments/Prompts |
|---|------------------|
| <ol style="list-style-type: none"> <li>1. Click on NUMERIC DATA CELL on the right side of the <i>Settings</i> panel.</li> <li>2. Choose format options from the left side of the <i>Settings</i> panel.</li> <li>3. Choose the NUMERIC format for the cell from the drop-down list,<br/><b>OR</b><br/>Choose CUSTOM and use the dialog box to create a new format.</li> <li>4. Press APPLY FORMAT to apply/view settings without re-running the query.</li> </ol> |                  |

NOTE: The format box appears only when a numeric data cell is selected.

### Custom Format Dialog Box



#### Additional Setting Options:

On Left - Select ON LEFT to display the header to the left of the data column. Select ON TOP to display the header on top of the data column (default setting for Forms block type).

On Top - Select ON TOP to display the header on top of the data column (default setting for Table, Financial and Cross Tab block types).

NOTE: Both options above can be selected concurrently.



## Block Type

**Concept** The block type of a document may be changed while the document is being created or edited. From either the RESULTS tab or the SETTINGS tab, select the appropriate button for the block type desired from the *Block Type* section of the toolbar. The default block type for a document is a simple table.

Block Type toolbar



## Selecting a Block Type When Creating a Document

| What you do...  | Comments/Prompts   |
|---|--|
| 1. Select the RESULTS tab or the SETTINGS tab.  |  |
| 2. From the <i>Block Type</i> toolbar, click the button for the block type group desired. | The Block Type dialog box will appear which contains pictures of the available types for that group.                   |
| 3. Select the specific block type desired and click OK.                                   | The Block panel will change to reflect the type of block selected. Guidelines will appear to help arrange the objects. |

## Changing a Block Type

**Concept** Once a block type has been selected, it can be changed at any time.

### Changing a Block Type while Editing a Document

| What you do...   | Comments/Prompts                                     |
|--|--|
| 1. Select the RESULTS or SETTINGS tab.                               |  |
| 2. Choose a group type from the Block Type toolbar.                  |  |
| 3. From the dialog box, select the new block type desired. Click OK. | The data will be displayed using the new Block Type. |

OR

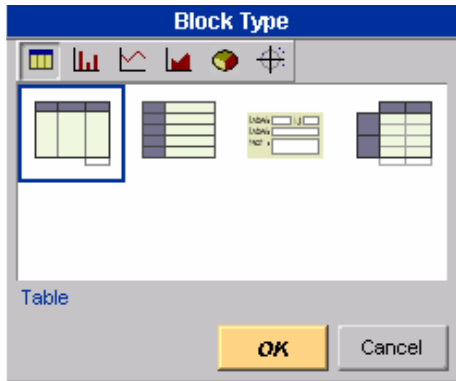
### Changing a Block Type while Viewing a WebIntelligence Document

| What you do...   | Comments/Prompts                                     |
|--|--|
| 1. To display the Block Type buttons, click on the < arrow at the upper right-hand corner of the page. Toggling the arrow will show or hide the toolbar. |  |
| 2. Click one of the <i>Block Type</i> buttons displayed on the right side of the page.   | The data will be displayed using the new Block Type. |

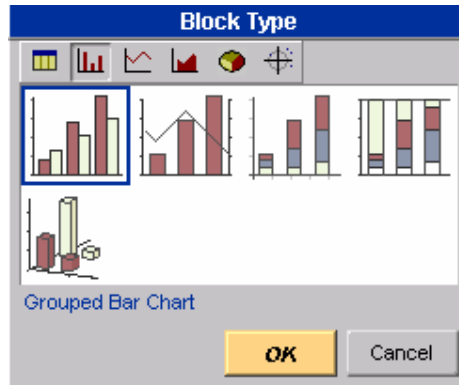
**NOTE:** This feature is *not* available in BusinessObjects documents.

## Block Type Dialog Boxes

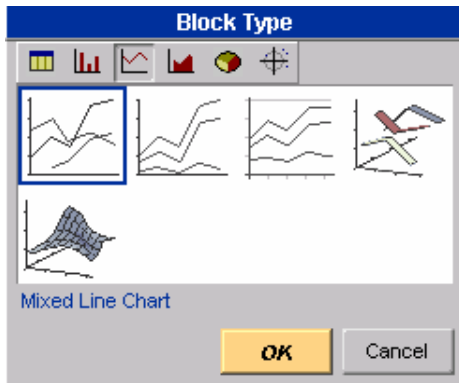
### Table



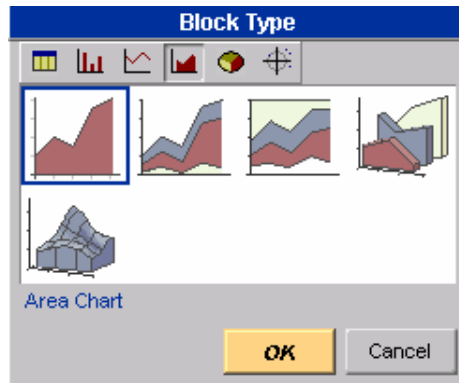
### Grouped Bar Chart



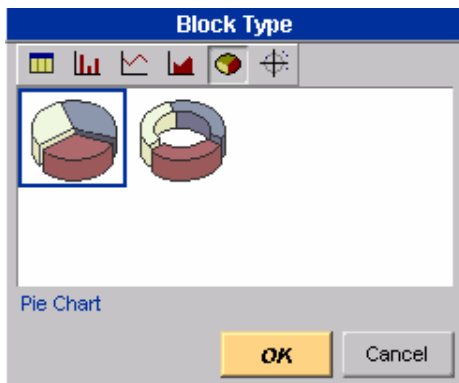
### Mixed Line Chart



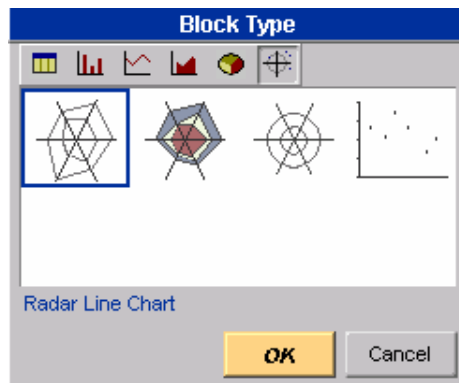
### Area Chart



### Pie Chart



### Radar Line Chart



## Block Types

Block types are broken down into six groups. The Table group is the most common and will be the only type defined in this manual. If additional information is needed regarding the other types of blocks, refer to the online help menu.

### Table

**Simple Table** – This block type presents the data in a two-dimensional list. The display of the columns in the document is the same as the layout of the objects in the Block panel. The layout of the body of the table is in the block panel. This is the default block type.

**Financial Table** – This block type is similar to a basic table; however, the header and data information is displayed in a vertical format. When designing, double-click objects to add them to the table block panel to arrange the rows vertically instead of horizontally.

**Forms** – This block type presents the data using multiple rows. Each entry will be displayed using multiple rows.

**Cross tabs** – This block type presents the data in a multidimensional row/column format. Like a table, the data is displayed in columns and rows. Each column must have at least one column header and each row at least one row header. Row header objects are placed in the lower-left corner of the cross tab and column header objects are placed in the upper-right corner of the cross tab. The objects placed in the lower right corner provide the data for the table body.

*NOTE: Reference on-line help for additional information.*

### Additional Available Block Types:

#### Grouped Bar Chart

Grouped Bar Charts  
Line and Bar Charts  
Stacked Bar Charts  
Percent Bar Charts  
3D Bar Charts

#### Mixed Line Chart

Mixed Line Charts  
Stacked Line Charts  
Percent Line Charts  
3D Line Charts  
3D Surface Charts

#### Area Chart

Stacked Area Charts  
Percent Area Charts  
3D Area Charts  
3D Volume Charts

#### Pie Chart

Pie Charts  
Doughnut Charts

#### Radar Line Chart

Radar Line Charts

Stacked Radar Area Charts  
Polar Charts  
Simple Scatter Charts

|                          |  |
|--------------------------|--|
| <b>Alphanumeric</b>      | the set of characters which includes the letters a through z and digits 0 through 9.   |
| <b>Apply Format</b>      | the function that applies a specified format to data that has already been retrieved.  |
| <b>Bracket</b>           | used with conditions to specify the sequence the conditions should be applied. Brackets must be used with caution, as misplaced brackets return misleading data.   |
| <b>Class</b>             | tables of logically grouped data.  |
| <b>Condition</b>         | a function that restricts the amount of data retrieved in a query.   |
| <b>Conditions Tab</b>    | the page of the Web-Panel where conditions are applied to data retrieved by a query.   |
| <b>Constant</b>          | a specific value in a field, as opposed to a range or all possible values.   |
| <b>Detail Object</b>     | a descriptive field providing more detailed information about a Dimension Object.  |
| <b>Dimension Objects</b> | key fields on which queries are built, which usually contain character data or dates   |
| <b>Filter</b>            | a function that restricts the amount of data displayed after a query is run.   |
| <b>Hard Code</b>         | to enter a literal value of data to be retrieved into a query.   |
| <b>Measure Object</b>    | a field containing the results of a calculation.   |
| <b>Object</b>            | a field or set of data in a universe. The three types of Objects are Dimension (denoted by a cube), Detail (denoted by a pyramid), and Measure (denoted by a dot). |
| <b>Operand</b>           | a description against which data is to be compared.  |
| <b>Operator</b>          | defines the relationship between Operand and Object.   |
| <b>Prompt</b>            | a variable supplied by the user to complete a query condition.   |
| <b>Query</b>             | the criteria specified in the Web-Panel used to retrieve selected data.  |
| <b>Results Tab</b>       | the page of the Web-Panel where objects are queried and sequenced, and breaks and sorts are defined.   |
| <b>Run Query</b>         | the function that contacts the server and retrieves requested data.  |
| <b>Settings Tab</b>      | the page of the Web-Panel where documents can be formatted and customized.   |
| <b>SQL</b>               | Structured Query Language; a computer language used in writing queries.  |
| <b>Universe</b>          | a complete set of data and data operations, consisting of classes and objects. Objects map to data in the database, which permits queries on the universe.         |
| <b>Web Browser</b>       | software used to locate and display web pages.   |

|                  |  |
|------------------|--|
| <b>Web-Panel</b> | the interface used to build queries (RESULTS tab), apply conditions (CONDITIONS tab), and format the resulting documents (SETTINGS tab). |
| <b>Wildcards</b> | symbols representing one (_) or more (%) unknown characters, enabling selection of multiple values with a single specification.          |