Contents

Chapter 1.   About the Introduction to Reporting course

Aim of the course

➢ Gain an understanding of the BusinessObjects program

➢ Analyse ██████ data and present it in a BusinessObjects report

Target audience

➢ IAD Application Owners

➢ IAD Universe Designers

➢ Business Experts

➢ Report Creators

➢ Specialist Report Creators

➢ Applications Support Officers

Learning outcomes

At the end of this course, participants will be able to:

➢ Understand why and how BusinessObjects is deployed within ██████████ ██████

➢ Identify common BusinessObjects components

➢ Identify the necessary steps in the planning process

➢ Find data

➢ Build simple queries on universes

➢ Organize data in reports

➢ Use simple formatting

➢ Use simple drill techniques

➢ Create charts

➢ Format charts

➢ Print and publish reports

Prerequisites

➢ A knowledge of the business domain

➢ A functional knowledge of the Windows operating system

➢ Some knowledge of report writing and presentation techniques

Course agenda and timing

Timing	Learning outcomes	Content
15 mins	➢ Gain an understanding of the deployment of the BusinessObjects program within ███████████ ████	➢ Understand why and how BusinessObjects is used within ███████████ ➢ Identify the role and name of each person responsible for supporting BusinessObjects ➢ Understand the learning expectations
5 mins	Topic review	Topic review and questions
30 mins	➢ Identify common BusinessObjects components	➢ Launch BusinessObjects ➢ Navigate the BusinessObjects menus and toolbars ➢ Use the keyboard shortcuts ➢ Use the right-click menus ➢ View the status bar ➢ Open the different BusinessObjects views such as Report Manager and Query Panel ➢ Customise BusinessObjects ➢ Exit the BusinessObjects program
5 mins	Topic review	Topic review and questions
30 mins	➢ Identify the necessary steps in the report planning process	➢ Be able to clearly identify the necessary steps in the planning process ➢ Have the report specified on paper before opening BusinessObjects ➢ Design the report with the WebIntelligence viewer in mind ➢ Design the report for the screen ➢ Design the report for a paper printout ➢ Understand metadata descriptions ➢ Use descriptive items
5 mins	Topic review	Topic review and questions
15 mins	➢ Find data	➢ Start creating a report ➢ Use a template to format the report ➢ Understand the different data sources that are available and how to access these to get the information that is needed
5 mins	Topic review	Topic review and questions

Timing	Learning outcomes	Content
60 mins	➢ Build simple queries on universes	➢ Understand the definition of universes ➢ Understand the definition of classes ➢ Understand the definition of objects ➢ Navigate within the classes and objects box ➢ Build queries on universes by dragging and dropping objects from the classes and objects box ➢ Sort objects within the Query Panel ➢ Run the query
5 mins	Topic review	Topic review and questions
30 mins	➢ Organize data in reports	➢ Save the report ➢ Limit the amount of information displayed in a report by using filters ➢ Order the information using ranking or sorting
5 mins	Topic review	Topic review and questions
30 mins	➢ Use simple formatting	➢ Format the cells that make up a report
5 mins	Topic review	Topic review and questions
30 mins	➢ Use simple drill techniques	➢ How drill mode works ➢ Switch to drill mode ➢ Drill down ➢ Drill up ➢ Undo drill actions ➢ Display different values in the Drill toolbar
5 mins	Topic review	Topic review and questions
30 mins	➢ Create and work with charts	➢ Use the Insert Chart wizard ➢ Turn a table into a chart ➢ Switch between chart types ➢ Put the chart onto a new page ➢ Print the chart ➢ Drill on the chart
5 mins	Topic review	Topic review and questions

Timing	Learning outcomes	Content
30 mins	➢ Format chart components	➢ Format the chart block ➢ Resize the chart block ➢ Format a bar chart ➢ Format a pie chart ➢ Format the axes on a chart ➢ Format the chart legend ➢ Format the title of a chart ➢ Format the chart gridlines
5 mins	Topic review	Topic review and questions
30 mins	➢ Print and Publish	➢ Print a report ➢ Publish a report ➢ Use categories ➢ Create categories
5 mins	Topic review	Topic review and questions
30 mins	➢ Checklist	➢ Standard 'about this report' information in each report ➢ Standard report template including report id, standard headings, identification as a corporate report ➢ Report naming including name, description, subject keywords ➢ Report design principles
15 mins	Course review	Course review and questions

How to use this manual

This manual should be used as an outline to follow while training. It has been "scripted" but relies on a trainer with content knowledge of BusinessObjects to conduct the course.

Methodology

All of the following methods will be used at some time during this session to help you learn how to use BusinessObjects to create a report.

➢ Guided Demonstration

➢ Hands-on

➢ Lecture

➢ Discussion

Conventions used - graphics

Indicates session objectives

Indicates trainer led discussion

Indicates trainer led demonstration

Chapter 2.   Introduction - what is BusinessObjects?

Overview

Topics include an overview of BusinessObjects, why and how ▓▓▓▓▓▓ ▓▓▓▓▓▓▓▓ will use BusinessObjects, who to contact if problems arise and the methodology of the training course.

Learning outcomes

➢ An understanding of the BusinessObjects program

➢ Why and how BusinessObjects will be used within ▓▓▓▓▓▓▓▓▓▓

➢ A knowledge of the role and name of each person responsible for supporting BusinessObjects

➢ An understanding of the learning expectations

What is BusinessObjects?

BusinessObjects is a management-reporting tool. It is an integrated query, reporting and analysis program that allows you to report on the information contained in the corporate databases. You can access the data in directly from your desktop and present and analyse this information in a BusinessObjects document.

You need no technical knowledge of the underlying data structures to get the information you want. What you do need, however, is knowledge of ▓▓▓▓▓ business.

➢ You can and format your documents to high presentation standards for viewing on screen or for printing.

➢ You can quickly and easily share the documents you have created with other users in ▓▓▓▓▓▓, either by sending them directly to selected individuals or groups or by publishing them as corporate documents.

When you distribute documents in these different ways, you use the BusinessObjects repository that is the central store for all reports. When you update a document, BusinessObjects reconnects to the database and retrieves the updated data. This is called refreshing a document.

BusinessObjects is the tool that makes it easy to obtain the data required for reporting as the management of the core data is done for you

To access a data source with BusinessObjects is as easy as dragging and dropping the data you require

The planning process is critical; you need to design the report with the WebIntelligence viewer in mind if you are going to share the report with other people. Focus on aspects such as screen layout plus the display and meaning of objects before you start to create the report.

Contacts

The people to speak to for an understanding of the BusinessObjects program and for any problems are ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
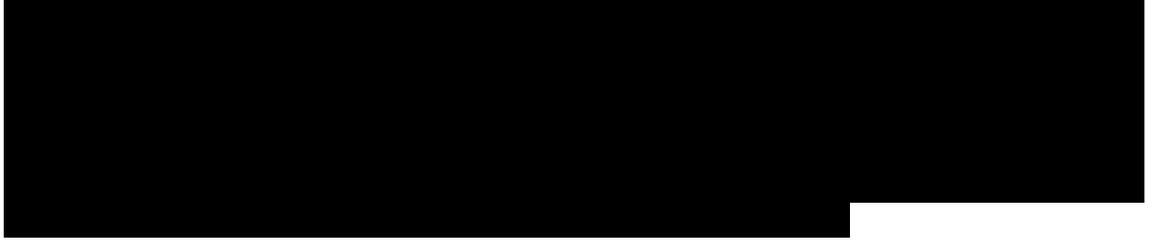
Review

- ➢ Why and how will BusinessObjects be used within ▮▮▮▮▮▮▮▮▮▮▮?
- ➢ What is the role and name of each person responsible for supporting BusinessObjects?
- ➢ What do you expect to learn?

Chapter 3.   Identifying common BusinessObjects components

Overview

This chapter gives an overview of the BusinessObjects program and its components

Learning outcomes

➢ Launch BusinessObjects

➢ Navigate BusinessObjects menus and toolbars

➢ Use keyboard shortcuts

➢ Use right-click menus

➢ View the status bar

➢ Open different BusinessObjects views such as Report Manager and Query Panel

➢ Customise BusinessObjects

➢ Exit BusinessObjects

The BusinessObjects program

Step 1.   Double click the BusinessObjects icon on the desktop.

Step 2.   Click Cancel to close the New Report Wizard.

Step 3.   Navigate the BusinessObjects menus.

Step 4.   Use keyboard shortcuts.

Step 5.   View the BusinessObjects toolbars.

Step 6.   Right-click on different areas of the screen.

Step 7.   Look at the status bar.

Step 8.   Open the BusinessObjects view Report Manager.

Step 9.   Open the BusinessObjects view Query Panel.

Step 10.   Click on Tools, Options to customise BusinessObjects.

Step 11.   Click on File, Exit to close BusinessObjects.

Review

- ➢ How do you launch BusinessObjects?
- ➢ Navigate the BusinessObjects menus and toolbars
- ➢ Use a keyboard shortcut
- ➢ Use a right-click menu
- ➢ What is the status bar?
- ➢ Open the BusinessObjects views Report Manager and Query Panel
- ➢ Customise BusinessObjects
- ➢ Exit BusinessObjects

Chapter 4.   The planning process

Overview

The planning process is critical. This chapter encompasses designing the report with the Web Intelligence viewer in mind. It focuses on aspects such as screen layout plus the display and meaning of objects.

Learning outcomes

➢ Be able to clearly identify the necessary steps in the planning process

➢ Have the report specified on paper before opening BusinessObjects

➢ Design the report with the WebIntelligence viewer in mind

➢ Design the report for the screen

➢ Design the report for a paper printout

➢ Understand metadata descriptions

➢ Use descriptive items

The story board approach

Think about the end result and step your way through the means to achieve the report you want.

Step 1.   Do a gap analysis.

➢ Identify if your report is available anywhere else.

➢ Can you base your report on an existing report? If the answer is yes then use an existing report as a template.

➢ Do you want to extend an existing report? If the answer is yes then contact the IAD co-ordinator to discuss the extension.

Step 2.   Draw a mock-up of what the report will look like. What will be in your columns and rows?

Step 3.   Identify the sources for your data. E.g. the Oracle General Ledger Release v2 universe.

Step 4.   Do you have the objects you need for calculations and groupings? E.g. the Expense Initial Budget object.

Step 5.   What filters need to be applied? E.g. you only want to see the results from one particular branch.

Step 6.   What needs to be sorted? E.g. you want to sort by branch name.

Step 7.   What conditions need to be set? E.g. you want to be alerted if the budget has been exceeded.

Step 8.   What are the parameters for the report? E.g. project start and end dates.

Flowchart

```
┌─────────────────────┐
│  Start creating a   │
│ mockup of the report│
└─────────────────────┘
          │
          ▼
      ◇ Validation:          ◇ Create a template? ──▶ ( Save the report as a
        existing report? ──▶                              template )
          │                        │
          │                        ▼
          │                   ◇ Extend the report? ──▶ ( Contact the IAD
          │                                                co-ordinator )
          ▼
      ◇ Do the sources ──▶ [ Identify calculations ]
        exist?                   │
          │                      ▼
          ▼                 [ Identify groupings ]
   ( Contact the universe        │
        designer )               ▼
                            [ Identify audience ]
                                 │
                                 ▼
                            [ Define the report
                               parameters ]
                                 │
                                 ▼
                            ( Create the report )
```
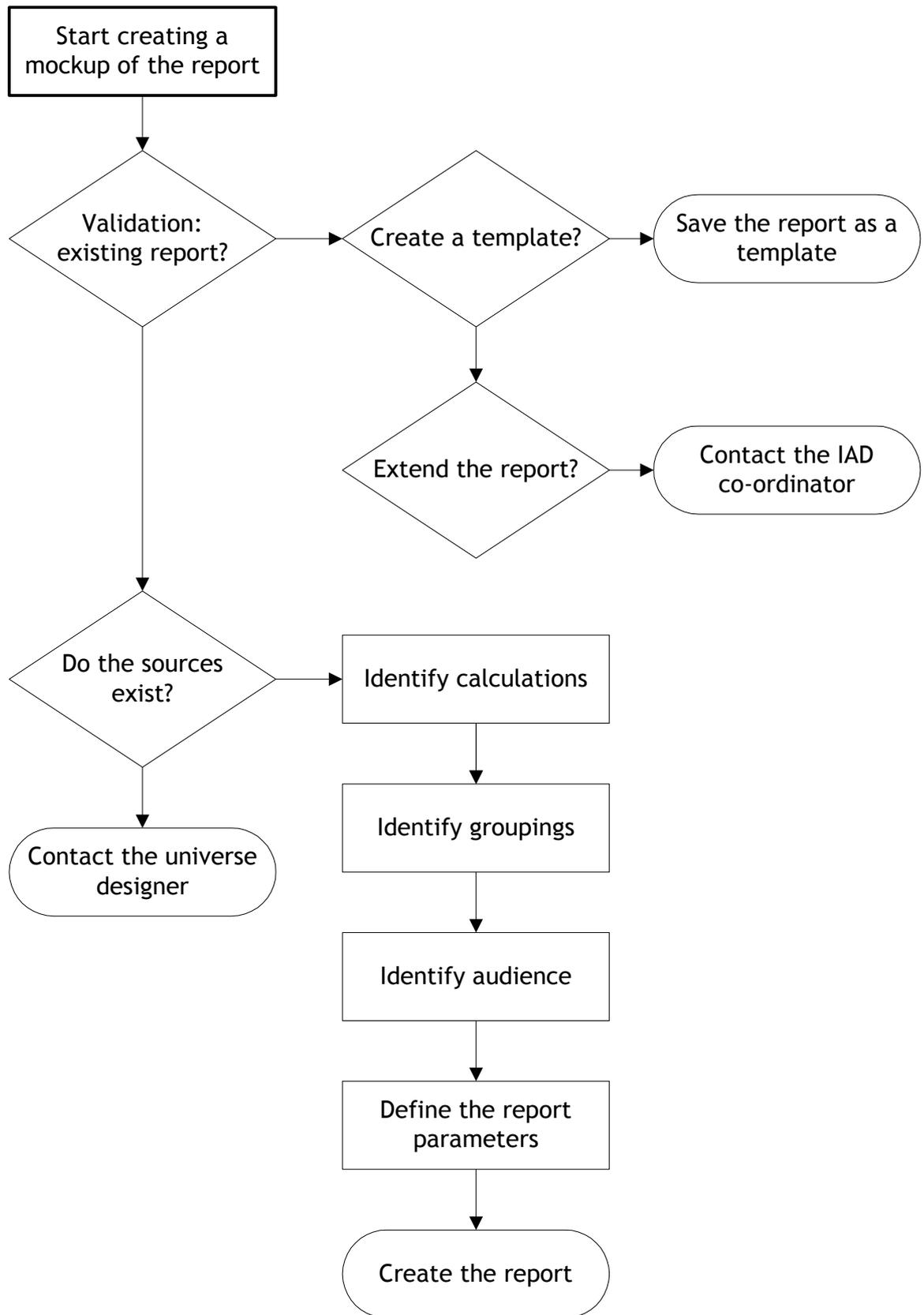
Assumptions

- ➢ That a similar report doesn't exist elsewhere.
- ➢ That the universe the report will come from exists.
- ➢ That the objects you want to use exist.

Metadata descriptions

Step 1. Click on File, Open.

Step 2. Double click on the file called Object Descriptions and Metadata.rep.

Descriptive items

Business Objects software provides a limited set of descriptive items about a report or query. The items are:

- ➢ Name
- ➢ Short description
- ➢ Subject keywords
- ➢ Published – by whom
- ➢ Last refreshed – date, time, by whom

Standard functionality allows these items to be viewed in Infoview.

Step 1. Click on the File menu and select Properties.

Step 2. View and change the descriptive items.

A search facility is available on these items. The search only covers the reports that the user has access to.

Extra descriptive items are required to meet any of the metadata standards (for example ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓.

There is no facility in Business Objects to show any descriptive information about the fields in a report. For example a column may be headed 'committed amount' but there is no means available to a report viewer to get any information about it.

A report creator can use the Reporter software to get the required information.

'About this report' details

All reports must have an 'About this report' tab which contains the following information.

- ➢ The name of the report e.g. ▓▓▓▓▓▓▓▓▓▓▓▓▓▓
- ➢ The purpose of the report e.g. ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓.

➢ Information Current To :

➢ Owner : e.g. Accounting Services

➢ Custodian : e.g. ███████████

➢ Date Created :

➢ Date Last Modified :

➢ Version : e.g.1.0

➢ Audience : e.g. ████████████████████████████

➢ Report Type : e.g. Financial Management

➢ Sources : e.g. Oracle Financials - GL

Review

➢ Create a report plan

Chapter 5.   Finding data

Overview

This chapter is about accessing data, i.e., how to get data from your database to the reports that you create with BusinessObjects. It introduces the different data sources that are available and how, using BusinessObjects, you can access these to get the information you need when you need it.

Learning outcomes

➢ Start creating a report

➢ Use a template to format the report

➢ Understand the different data sources that are available and how to access these to get the information that is needed

Creating a report using the default template

To help you access a data provider when you create a new document, BusinessObjects launches the New Report Wizard when you start the application for the first time:

Tip: **To run this wizard once you have launched BusinessObjects, click the New icon on the Standard toolbar or the New Report Wizard icon.**

Step 1.   Click the radio button for Select a template for the report layout and then click Begin.

Step 2.   The default template is highlighted, click Next

Step 3.   Click the radio button for Universe when the Specify Data Access dialog box appears and then click Next.

Step 4.   Scroll down to find the required universe (Oracle General Ledger Release v2 for training purposes), click on it and then click Finish.

The Query Panel appears and you can view all the classes and objects in the universe you selected and use these to build your query.

Creating a report using the crosstab template

Step 1.   Click the radio button for Select a template for the report layout and then click Begin.

Step 2.   The default template is highlighted, click on the Crosstab template.

Step 3.   Click Next.

Step 4.	Click the radio button for Universe when the Specify Data Access dialog box appears and then click Next.
Step 5.	Scroll down to find the required universe (Oracle General Ledger Release v2 for training purposes), click on it and then click Finish.
	The Query Panel appears and you can view all the classes and objects in the universe you selected and use these to build your query.

Review

➢ Start creating a report

➢ Use the default template to format the report

➢ Name the training data source and describe how to access it

Chapter 6.   Building simple queries on universes

Overview

This chapter is about accessing data by using BusinessObjects native technology.

You bring data to a report by building a query on a universe. You complete this task in the Query Panel, a graphical interface that enables you to build a query by dragging and dropping objects from the universe.

Learning outcomes

- ➢ Understand the definition of universes
- ➢ Understand the definition of classes
- ➢ Understand the definition of objects
- ➢ Navigate within the classes and objects box
- ➢ Build queries on universes by dragging and dropping objects from the classes and objects box
- ➢ Sort objects within the Query Panel
- ➢ Run the query

Universes

Information comes from a universe. A universe connects to data in a database, using everyday terms that describe the ▮▮▮▮▮ business environment. This means you can select exactly the data you need.

A universe provides the link between the core data and the usable objects.

A universe is made up of classes and objects.

- ➢ A folder represents a class.
- ➢ Each icon within a class represents an object.

Each object corresponds with data in the database and enables you to get data for your reports.

For example, some of the objects in the Oracle General Ledger Release v2 universe are Branch Name, Expense Initial Budget and Branch Code.

Classes are logical groupings of objects. Each class has a meaningful name, such as Variables.

Dimension objects, measure objects and detail objects

When creating universes, universe designers define and qualify objects. The qualification of an object reveals how it can be used in analysis in reports.

An object is a dimension object, a detail object or a measure object.

- ➢ Dimension objects retrieve the data that will provide the basis for analysis in a report. Dimension objects typically retrieve character-type data such as Branch Name.

➢ Detail objects are always associated to one dimension object because it provides additional information. For example, Branch Code is a detail object that is associated with Branch Name.

➢ Measure objects return values depending on the objects they are used with. For example, if you include Branch Name and Expense Initial Budget in a query, expense per Branch is calculated. Measure objects convey numeric information by which a dimension object can be measured.

Displaying the objects that you can include in a query

In the Query Panel, the Classes and Objects box presents the classes, sub-classes and objects of the universe that you are using. Objects represent the data that you can retrieve via the universe. Classes are logical groupings of objects. Classes can also contain sub-classes. When the Query Panel appears, only the universe's classes are visible.

Step 1. Click the + plus to the left of the Oracle Financials class icon to view the class's objects and sub-classes.

Step 2. Click the + plus to the left of Branch Name.

Step 3. Click the + plus to the left of General Ledger.

Step 4. Click the + plus to the left of GL Budget.

Step 5. Click the + plus to the left of Bo_Hint.

Including objects in a query

When you include an object in the query, you instruct BusinessObjects to retrieve the data for that object from the database. For example, to display the Initial Expense Budget by Branch Name in your report, you include the Expense Initial Budget and Branch Name objects in the query.

You include an object in a query by placing it in the Result Objects box. There are three ways of doing this. You can:

➢ Click an icon in the Classes and Objects list and drag it to the Result Objects box.

➢ Double-click an object in the Classes and Objects list.

➢ Click a class folder and drag it to the Result Objects box. All the objects in the class appear in the Result Objects box.

Once you have placed objects in the Result Objects box, you have built a basic query.

Step 1. Double-click the Branch Name object in the Classes and Objects list.

Step 2. Repeat to add the Branch Code, Expense Initial Budget and Hint objects to the query.

Tip: **The Hint object must be included in all queries because it dramatically reduces the time it takes to retrieve data into the report.**

Changing the order of the objects in a query

The order in which the objects appear in the Result Objects box determines the order in which the data will appear in the report. To move an object, click its icon. You can now:

➢ Drag the icon to the left or the right and then release the mouse button.

➢ Swap the icon with another object icon in the Result Objects box by holding down the Shift key, dragging it until it is above the object you want to swap, then releasing your mouse button.

Step 1. Drag the Branch Name icon to the right of the Branch Code icon and then release the mouse button.

Applying a sort on an object

Step 1. Click the object Expense Initial Budget in the Result Objects box.

Step 2. Click the Sort icon on the toolbar.

Inverting a sort on an object

Step 1. Double-click the sort icon below the object. The arrow in the sort icon appears the other way up, to indicate that you have inverted the sort.

Removing a sort on an object

Step 1. Drag the sort icon from the Expense Initial Budget object in the Result Objects box to the Classes and Objects list.

Step 2. Release the mouse button.

Removing objects from a query

If you decide you want to remove an object from the query you are building, click its icon in the Result Objects box. You can now remove the object by:

➢ Dragging the icon to the Classes and Objects list.

➢ Pressing the Delete key.

> ➢ Clicking your right-mouse button, then selecting the Delete command on the pop-up menu that appears.

Step 1. Click with right mouse button on the Branch Name object.

Step 2. Click Remove.

Step 3. Repeat to remove all objects from the query.

Running the query

Step 1. Double-click the Branch Name object in the Classes and Objects list.

Step 2. Repeat to add the Branch Code, Expense Initial Budget and Hint objects to the query.

Step 3. Click Run to have the query retrieve the data from the database.

Tip: **Click the Edit Data provider icon on the Standard toolbar to go back to the Query Panel.**

Saving the definition of a query

You can build a query without having to run it immediately.

Step 1. Click the New icon on the standard toolbar.

Step 2. Click the radio button for Select a template for the report layout and then click Begin.

Step 3. The default template is highlighted, click Next

Step 4. Click the radio button for Universe when the Specify Data Access dialog box appears and then click Next.

Step 5. Scroll down to find the universe Oracle General Ledger Release v2, click on it and then click Finish.

Step 6. Build another query then click Save and Close instead of Run.

This feature lets you:

> ➢ Save a query so that you can continue defining it at a later stage.

> ➢ Save a query that you have finished defining, but that you do not want to run right away, for example because you know network traffic is heavy.

Tip: **Click the Refresh Data icon on the Standard toolbar to bring values into your report.**

Review

➢ What is a universe?

➢ What is a class?

➢ What is an object?

➢ Navigate within the classes and objects box

➢ Build a simple query by dragging and dropping objects from the classes and objects box into the Result Objects box

➢ Sort an object

➢ Run a query