

## **WebIntelligence 3.1 Basic Reporting**

### **Course Summary**

#### **Description**

This class is a combination of instructor-led lecture, discussions, and demonstrations with a heavy emphasis on hands-on workshops to teach WebIntelligence. Topics include; creating new documents, formatting reports, applying reporting functions, and creating alerters.

#### **Objectives**

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

- Build queries
- Work with filters
- Utilize the speedmenu
- Format reports
- Apply a variety of reporting functions
- Apply calculations
- Create alerters in reporting

#### **Topics**

- WebIntelligence™ As A Tool
- What Is WebIntelligence™?
- WebIntelligence™/Full Client Differences
- What Is A Universe?
- What Are Objects/Query?
- Adding /Removing Objects
- Adding/Removing Filters
- Using Query/Report View
- Saving Documents to Favorites
- Saving to Local File Formats
- Inserting, Duplicating, Deleting, Renaming Reports
- Inserting/Removing Columns
- Adding New Rows and Columns
- Sizing Rows and Columns
- Fonts
- Colors
- Justification
- Ranking
- Breaking
- Folding
- Sorting
- Filtering
- Calculations
- What are Alerters
- Creating Alerters/Sub-Alerters
- Applying Alerters to Reports

#### **Audience**

This course is designed for WebIntelligence users who create their own documents and/or anyone using Desktop Intelligence reporting.

#### **Prerequisites**

Students should have basic windows skills.

#### **Duration**

One day

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### Course Outline

#### I. Overview

- A. WebIntelligence As a Tool
- B. What Is WebIntelligence?
- C. WebIntelligence□/Full Client Differences
- D. What Is a Universe?
- E. WebIntelligence□ Users
- F. Getting Started With WebIntelligence
- G. What Are Objects?
- H. Introduction to Blocks
- I. Logging In
- J. Viewing/Copying Folders
- K. Copying Document and Hyperlinks
- L. Customizing My Infoview

#### II. Creating New Documents

- A. What Is a Query?
- B. Adding Objects
- C. Adding Filters
- D. Using Query View
- E. Using Report View
- F. Saving Documents To Favorites
- G. Saving Documents To Local File Formats

#### III. Formatting Reports

- A. Inserting, Duplicating, Deleting, Renaming Reports
- B. Inserting / Removing / Moving Columns
- C. Adding New Columns and Rows
- D. Sizing Rows and Columns
- E. Fonts, Colors, Etc
- F. Justification

#### IV. Functions

- A. Ranking
- B. Breaking
- C. Folding
- D. Sorting
- E. Filtering
- F. Calculations

#### V. Alerters

- A. What are Alerters
- B. Creating Alerters
- C. Creating Sub-Alerters
- D. Applying Alerters to Reports
- E. Active Data Tracking