

WebIntelligence 3.1 Intermediate 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 using templates, using Turn To, vertical, horizontal, forms and crosstab reports, master/detail, complex conditions, charts, advanced crosstabs, alerters with crosstabs, and formulas and variables.

Objectives

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

- Create a variety of report format types
- Create a variety of charts
- Create complex conditions with prompts
- Create complex crosstabs
- Apply formatting options and alerters to crosstab blocks
- Create and edit formulas and variables
- Utilize functions in formulas and variables

Topics

- Using Templates/Turn To
- Creating Vertical/Horizontal Blocks
- Creating Forms/Crosstab Blocks
- Creating Master/Detail Reports
- Inserting Multiple Master Cells
- Adding Summary Cells to Master
- Creating and Formatting Charts
- Chart Types
- Create Prompts
- Setting Default Values For Prompts
- Creating Multiple Filters
- Using Ands/Ors /Using Brackets
- Introduction to Blocks
- Creating Crosstabs
- Displaying Row and Column Headers
- Advanced Crosstabs
- Applying Breaking, Ranking, Folding
- Applying Sorting
- Applying Local Report Filters
- Creating Master/Detail Reports
- Applying Alerters to Crosstabs

Audience

This course is designed for WebIntelligence users and/or anyone using Desktop Intelligence reporting.

Prerequisites

Students should have taken the WebIntelligence 3.0/3.1 Basic Reporting course before attending.

Duration

One day

WebIntelligence 3.1 Intermediate Reporting

Course Outline

I. Reporting Options

- A. Drag and Drop
- B. Using Templates
- C. Using Turn To
- D. Creating Crosstabs
- E. Creating Forms
- F. Creating and Formatting Crosstabs
- G. Using Turn To
- H. Relative Positioning Blocks Creating Sectioned Reports
- I. Section Formatting

II. Creating Charts

- A. Using Templates
- B. Turn To Charts
- C. Using Properties Tab
- D. Formatting Charts
- E. Color Formatting
- F. Measure Values Orientation
- G. Filtering On Dimensions
- H. Changing Chart Variables

III. Creating Complex Conditions

- A. Using Prompts
- B. Setting Default Values For Prompts
- C. Creating Filters Based On Cascading LOV
- D. Creating Multiple Filters
- E. Using Ands/Ors
- F. Using Brackets

IV. Crosstabs Basic Formatting

- A. Introduction to Blocks
- B. Creating Crosstabs
- C. Drag and Drop
- D. Using Templates
- E. Turn To
- F. Pivoting Via Headers
- G. Pivoting Via Structure Mode
- H. Displaying Row and Column Headers
- I. Removing/Replacing Headers
- J. Displaying Multiple Objects in Headers
- K. Effect of Adding Objects to the Query
- L. Inserting/Removing Objects in Body of Block
- M. Properties Tab

V. Functions and Master/Detail

- A. Breaking: Down/Across
- B. Break and Formula
- C. Break Properties
- D. Ranking: Down/Across
- E. Ranked Variable with Break
- F. Rank Properties
- G. Sorting/Custom Sorting
- H. Filtering on Headings
- I. Report Filters Panel
- J. Using Input Controls
- K. Running Sum
- L. If-Then-Else
- M. Inserting Master Cells
- N. Creating Summary Cells
- O. Creating Master/Detail Report
- P. Adding Summary Cells to Master
- Q. Saving Report to Excel

VI. Alerters

- A. Cell Format Alerter
- B. Text Format
- C. Variable Format
- D. Applying Alerters to Crosstab Body
- E. Applying Alerters to Crosstab Headers
- F. Editing and Reformatting Alerters
- G. Applying Different Types of Alerters