WebIntelligence 4.x: Basic and 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 creating different block structures, using Turn Into, vertical, horizontal, forms and cross table reports, master/detail, complex conditions, charts, advanced cross tables, ranking, breaking, sorting, filtering, Input Controls, and conditional formatting with cross tables.

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

- Work with the BI Launchpad
- Build queries
- Work with filters
- Use the New Copy/Paste functionality
- Utilize the speedmenu
- Create a variety of report format types
- Create a variety of charts
- Create complex conditions with prompts
- Create complex crosstabs

- Format reports
- Apply a variety of reporting functions
- Apply calculations
- Use conditional formatting in reports.
- Apply formatting options, reporting functions, Input Controls and conditional formatting to crosstab blocks.

Topics

- WebIntelligence as a Tool
- What is WebIntelligence?
- What is a Universe?
- What are Objects/Query?
- Working in BI Launchpad
- Understand BI Workspace
- Adding /Removing Objects
- Adding/Removing Filters
- Using Query/Report View
- Saving Documents to Favorites
- Saving to Local File Formats
- Using Copy and Paste
- Inserting, Duplicating, Deleting, Renaming Reports
- Inserting/Removing Columns
- Adding New Rows and Columns
- Sizing Rows and Columns
- Inserting Comments
- Hiding Objects
- Fonts
- Colors
- Justification
- Grouping
- Ranking
- Breaking
- Outlining
- Sorting
- Filtering
- Calculations

- What are Rules
- Conditional Formatting
- Applying Conditional Formatting to Report Blocks
- Using Templates/Turn Into
- Creating Vertical/Horizontal Blocks
- Creating Forms/Cross table Blocks
- Creating Master/Detail Reports
- Inserting Multiple Sections
- Adding Summary Cells to Sections
- Creating and Formatting Charts
- Chart Types
- Create Prompts / Saving Variants
- Setting Default Values for Prompts
- Creating Multiple Filters
- Using Ands/Ors /Using Brackets
- Review of Block Types
- Creating Cross Tables
- Displaying Row and Column Headers
- Advanced Cross Tables
- Applying Breaking, Ranking, Folding
- Applying Sorting
- Applying Filters at Block, Section and Report Level
- Applying Conditional Formatting to Crosstabs
- Outlining in Cross Tables
- Input Controls
- Implementing Input Controls at Report and Document Level

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Course Summary (cont’d)

Audience
This course is designed for WebIntelligence users who create their own documents and/or anyone using WebIntelligence Rich Client Reporting and WebIntelligence Desktop Reporting.

Prerequisites
Prior to taking this course, students should have taken the WebIntelligence 4.x Basic Reporting (1 Day) class and have basic Windows skills.

Duration
Two days
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Course Outline

I. Overview
   A. WebIntelligence As a Tool
   B. What Is WebIntelligence?
   C. WebIntelligence/Desktop Reporting 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. What is BI Launchpad
   K. Viewing/Copying Folders
   L. Copying Document and Hyperlinks
   M. Customizing BI Workspaces

II. Creating New Documents
   A. What Is a Query?
   B. Adding Objects
   C. Adding Filters
   D. Using Query View
   E. Data Preview
   F. Using Report View
   G. Saving Documents To Favorites
   H. Saving Documents To Local File Formats

III. Formatting Reports
   A. Adding, Duplicating, Deleting, Renaming Reports
   B. Using New Copy/Paste Functionality
   C. Inserting / Removing / Moving Columns
   D. Adding New Columns and Rows
   E. Sizing Rows and Columns
   F. Fonts, Colors, Etc
   G. Hiding Objects
   H. Justification
   I. Adding Comments

IV. Functions
   A. Ranking
   B. Breaking
   C. Outlining
   D. Grouping
   E. Sorting
   F. Filtering
   G. Calculations

V. Conditional Formatting
   A. What is Conditional Formatting
   B. Creating Rules
   C. Creating Conditions
   D. Applying Conditional Formatting to Reports
   E. Active Data Tracking

VI. Reporting Options
   A. Drag and Drop
   B. Using Turn Into
   C. Creating Cross tables
   D. Creating Forms
   E. Creating and Formatting Cross tables
   F. Using Turn Into
   G. Relative Positioning Blocks Creating Sectioned Reports
   H. Section Formatting

VII. Creating Charts
   A. Using Templates
   B. Turn Into Charts
   C. Using Assign Data
   D. Using Properties Tab
   E. Formatting Charts
   F. Using New Chart styles
   G. Color Formatting
   H. Measure Values Orientation
   I. Filtering On Dimensions
   J. Changing Chart Variables

VIII. Creating Complex Conditions
    A. Using Prompts/Saving as Variants
    B. Setting Default Values For Prompts
    C. Creating Filters Based On Cascading LOV
    D. Creating Multiple Filters
    E. Using Ands/Ors
    F. Using Brackets
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Course Outline (cont’d)

IX. Crosstabs Basic Formatting
   A. Reviewing Blocks styles
   B. Creating Cross tables
   C. Drag and Drop
   D. Turn Into
   E. Using Assign Data
   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

X. Functions and Sectioned Reports
   A. Advanced Breaking:
   B. Break and Formul
   C. Break Properties
   D. Advanced Ranking:
   E. Ranked Variable with Break
   F. Rank Properties
   G. Sorting/Custom Sorting
   H. Filtering on Headings
   I. Report Filters Panel Using Input Controls Utilizing Object functions
   J. Outlining
   K. Inserting Sections
   L. Creating Summary Cells
   M. Adding Summary Cells to Sections
   N. Saving Report to Local file formats

XI. Conditional Formatting
   A. What is Conditional Formatting
   B. Creating Rules
   C. Creating Conditions
   D. Cell Format
   E. Text Format
   F. Variable Format
   G. Applying Conditional Formatting to Cross table Body/Headers
   H. Editing and Reformatting Conditional Formatting
   I. Applying Different Types of Conditional Formats