ProTech Professional Technical Services, Inc.

WebIntelligence 4.2 Comprehensive

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 conditional formatting, 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, formulas, variables and functions, multiple data providers, advanced query filters, subqueries, cross tables and charts, combination queries, and advanced reporting techniques.

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
- Format reports
- Apply a variety of reporting functions
- Apply calculations
- Use conditional formatting in reports.
- Create a variety of report format types
- Create a variety of charts
- Create complex conditions with prompts

- Create complex crosstabs
- Apply formatting options, reporting functions, Input Controls and conditional formatting to crosstab blocks.
- Create formulas and variables
- Build advanced queries
- Access multiple data providers
- Merge multiple data providers
- Create combination queries
- Create drillable reports
- Revise SQL in existing reports.

Topics

- WebIntelligence™ As A Tool
- What Is WebIntelligence™?
- What Is A Universe?
- What Are Objects/Query?
- Working in BI Launchpad
- Understand BIWorkspace
- 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
- Fonts
- Colors

- Justification
- Grouping
- Ranking
- Breaking - Muli-level, Value Based, Auto-totals
- Outlining

- Sorting
- Filtering
- Calculations
- What are Rules?
- Conditional Formatting
- Applying Conditional Formatting to Report blocks
- Active Data Tracking
- Using Templates/Turn Into
- Creating Vertical/Horizontal Blocks
- Creating Forms/Cross table Blocks
- Creating Master/Detail Reports

Course Summary (cont'd)

- Inserting Multiple Sections
- Adding Summary Cells to Sections
- Creating and Formatting Charts
- Chart Types
- Create Prompts
- 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
- Creating Sectioned Reports
- Applying Conditional Formatting to Crosstabs
- Outlining in Cross Tables
- Input Controls – Document, Cascading
- Creating/Editing Formulas
- Creating/Editing Variables
- Converting Formulas to Variables
- Utilize Functions in Calculations

- Reference Cells
- Context
- Adding New Queries
- Duplicating Queries
- Deleting Queries
- Merging Dimensions to Link Data Providers
- Add To Merge
- Reporting From Excel, Text Files Directly
- Reporting From SQL Directly
- Reporting from Webi documents
- Creating Single Report Blocks From Multiple Data Providers
- Object To Object Filters
- Creating Subqueries (Any/All)
- Query within Query
- Union Queries
- Intersect Queries
- Minus Queries
- Viewing and Editing SQL
- Resetting and Saving Changes
- Hiding Cells, Blocks and Sections
- Linking Elements
- Shared Elements

Audience

This course is designed for WebIntelligence™ users who create their own documents.

Prerequisites

Prior to taking this course, students should have basic Windows skills.

Duration

Three days

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. Inserting 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

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 Formula
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

XII. Variables and Functions
A. Creating And Validating Formulas
B. Converting Formulas to Variables
C. Creating Variables
D. Advantages/Disadvantages of Both
E. Editing Variables
F. Duplicating Variables
G. Deleting Variables
H. Using Functions In Variables
I. Resetting Values
J. Reference Cells
K. Context Operators
L. Reference Cells

XIII. Multiple Data Providers
A. Adding New Queries
B. Duplicating Queries
C. Deleting Queries
D. Merging Dimensions to Link Data Providers
E. Creating Single Report Blocks From Multiple Data Providers
F. Adding to Earlier Merges
G. Reading Excel files directly
H. Reading Text Files directly
I. Reading SQL directly
J. Reading Webi Documents

XIV. Advanced Query Filters
A. Object To Object Filters
B. Creating Subqueries (Any/All)
C. Filters based on Previous Queries

XV. Shared Elements
A. What is Element Sharing
B. How do I Share a Block
C. Update vs Unlinking a Block
D. How it can Expedite Report Creation

XVI. Combination Queries
A. Union Queries
B. Intersect Queries
C. Minus Queries

XVII. Advanced Formatting
A. Hiding Objects
B. Conditionally Hiding blocks, cells and Sections
C. Linking Report Elements
D. Intra Document linking
E. Cascading Input Controls
F. Building Visualizations