WebIntelligence 4.x: 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 conditional formatting.

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.

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

Audience

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

Prerequisites

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

Duration

One day
WebIntelligence 4.x: Basic Reporting

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