

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

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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