

# How to Create a New Document / Report

Step-by-Step Instructions	HINTS
Log on to BI Launch Pad and open the <b>Web</b> Intelligence application.	Welcome: Steve Jobs Applications   Preferences Web Intelligence
Click on the new document icon in the toolbar.	Home Documents Web Intelligence , - + &
Select <b>Universe</b> from the <b>Create a Document</b> box that displays ( <b>Figure 1</b> ) and then click the <b>OK</b> button.	This opens the <b>Universe</b> selection box (Figure 2)
Select the specific universe that you need for your report and click on the <b>Select</b> button.	<ul> <li>At the bottom of the Universe box, you will often see an explanation of the universe selected.</li> <li>The Query Panel then opens. (See Figure 5 for sample Query Panel.)</li> </ul>
Select the desired <b>Objects</b> from the left <b>Universe</b> <b>outline</b> panel and drag them to the <b>Result Objects</b> panel.	Double-clicking moves them there too!
Select the <b>Objects</b> that you want to use in query conditions and drag them either from the <b>Universe outline</b> panel or from the <b>Result Objects</b> panel into the <b>Query Filters</b> panel.	
Select an <b>Operator</b> from the drop-down menu for each <b>Object</b> in the <b>Query Filters</b> panel.	<b>Figure 3</b> shows the drop down with the usual options: In list, Not in list, Equal to, Not Equal to, etc.
Enter your value for the <b>Object</b> in the second text box.	<b>Figure 4</b> shows where to enter your value. (You can choose <b>Prompt</b> in order to display a question every time you refresh your report and you can then select values that you want to limit the data retrieved by the query.)
Review <b>Query Panel</b> information.	<ul> <li>See Figure 5 for sample Query Panel.</li> <li>Note the bottom third pane of the Query Panel – Data Preview. Using this to preview your query is a quick way to validate your query filters prior to actually generating the report.</li> </ul>
Click <b>Run Query</b> to retrieve your data in a report.	See <b>Figure 6</b> for a sample report.



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	Select	a universe for the query.	Figure 2: S	Select a Universe.
	Type here to filter table		0	
	<u>A</u> vailab	Available Universes:		😂 Refresh universe I
	State	Name	<ul> <li>Revision</li> </ul>	Folder
Create a Document ② ×		Employee General	87	@BOBITEST_6400/Employee General
		Express Mail	188	@BOBITEST_6400/Express Mail
Select a data source		Faculty Load	32	@BOBITEST_6400/Student
		FINQO2N	42	@BOBITEST_6400/General Ledger
No data source		FINQUERY	227	@BOBITEST_6400/General Ledger
Create an empty document		FinQuery Template Universe	195	@BOBITEST_6400/General Ledger
🔉 Universe		FINSUMQ	43	@BOBITEST_6400/General Ledger
		FRES Work Requests	69	@BOBITEST_6400/Facilities
Select a universe as a data source.		ISC Billing Detail	150	@BOBITEST_6400/ISC Network
Excel		ISC Mainframe Chargeback	155	@BOBITEST_6400/ISC Chargeback
Select an Excel spreadsheet as a data source.		ISC Telecommunications Detail	158	@BOBITEST_6400/ISC Telecom
		Island Resorts Marketing	133	@BOBITEST_6400/Webi training
J BEx		Knowledge Link LMS	157	@BOBITEST_6400/Learning Management
Select a BEx query as a data source.		Learning Management	154	@BOBITEST_6400/Learning Management
📰 Analysis View		LOADSTAT	15	@BOBITEST_6400/Public
Pick an Analysis View as a data source.		PennERA Balances	173	@BOBITEST_6400/PennERA Proposals
FICK all Allalysis view as a data source.		PennERA Proposals	226	@BOBITEST_6400/PennERA Proposals
		PennERA Proposals - DWHE	227	@BOBITEST_6400/PennERA Proposals
Figure 1: Select a data source.	to track	k information on training required by r	egulation, but it now	dge Link) data. Knowledge Link was first used tracks information on a variety of training PHS employees, University employees, or
Or Cancel	_			Close
		Y Query Filters		<b>7 *</b>
		And Home Dept Org (EC	G) Equal to	▼ 0103
		Full Part Time (EG)	Equal to	
Figure 3: Select an Operator		Not in list		
- · ·				12
for your Query Filter object.		Equal to		
	•	-	Not Equal to	

Universe



Refresh universe list



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	🔁 Query Panel	e x			
	🞁 Add Query 🕶 🔄 🐨 🖬	Run Query   🖬 Close 🔻			
	🔆 Universe outline	🗊 Result Objects 🔹 🔻 🛪			
	Master Perspective -	🔰 Home Dept Org (EG) 🔰 Home Dept Org Desc (EG) 🔰 Penn ID (EG)			
	Vype here to filter tree ■+ □↑	Full Part Time (EG)			
	□-☆ Learning Management □-╔╴Trainee folder				
End LMS PersonTrainee Employee General					
<ul> <li>Image: Bridge Constraint Const</li></ul>	Y Query Filters				
	Home Dept Org (EG) Equal to 🔹 0103				
		And Full Part Time (EG) Equal to F			
Figure 5: C	Completed Query				
Panel exa	mple.				
		Image: Data Preview     Image: Refresh			
		Home Dept Org (EG)         Home Dept Org Desc (EG)         Penn ID (EG)         Full Part Time (E           0103         Biology         88848256         F         •			
		0103 Biology 66744776 F 0103 Biology 54705355 F			
		Q- Type a text to filter the values			
	📴 Query 1				
		Last refresh date: November 12, 2015 2:01:20 PM GMT-05:00			

#### Report 1

Home Dept O	Home Dept O	Full Part Time	Penn ID (EG)
0103	Biology	F	10000072
0103	Biology	F	10000179
0103	Biology	F	10000472
0103	Biology	F	10000587
0103	Biology	F	10000890
0103	Biology	F	10001125
0103	Biology	F	10001131
0103	Biology	F	10001277
0103	Biology	F	10003141
0103	Biology	F	10005036
0103	Biology	F	10005109
0103	Biology	F	10006032
.010	-	5	10007653

#### Figure 6: Report example.