

Web Intelligence Training Overview

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What is WebI?

Web Intelligence (WebI) is a web-based query tool that allows users to look at the information stored in our data warehouse.

It is part of a larger suite of business intelligence programs produced by SAP that DHRM has used to report on its data since 2009. Here is a link to SAP's [newsletter](#), where you'll find in-depth info on how to use it.

The data in our warehouse comes directly from the data entered into HRE by DHRM employees, so the data available to report on is only as accurate as the data entered in.

The Power of the Universe

SAP Universes are interactive layers used by WebI to reach through to look at the data in the warehouse. This allows users to view the data without being able to edit it.

Universes also add a layer of calculations & summaries to the original data. For instance, there is not a field in HRE that shows years of service. However, that calculation is built into the universe so it can be pulled just like any other field.

Universes are not static. They should adjust and grow with business needs. If you find an element of the universe that doesn't work well or is missing or is outdated, please share your ideas with the BIS team.

Logging In

Your first step is to find the website. Save this in your favorites: <https://reports.dhrm.utah.gov/BOE/BI>

Your logon screen should look like this:

SAP BusinessObjects
BI launch pad

Enter your user information, and click "Log On".
If you are unsure of your account information, contact your system administrator.

System: PEASREPORTSPROD:6400
User Name:
Password:
Authentication: Windows AD ▼

Log On

 [Help](#)

- Your User Name and Password are the same you use to log on to your computer.
- Be sure to set Authentication to Windows AD if it isn't already.
- If the UMD (Utah Master Database managed by DTS) stops working correctly, employees can still log in using "Enterprise" authentication but that needs to be enabled by the BIS team.

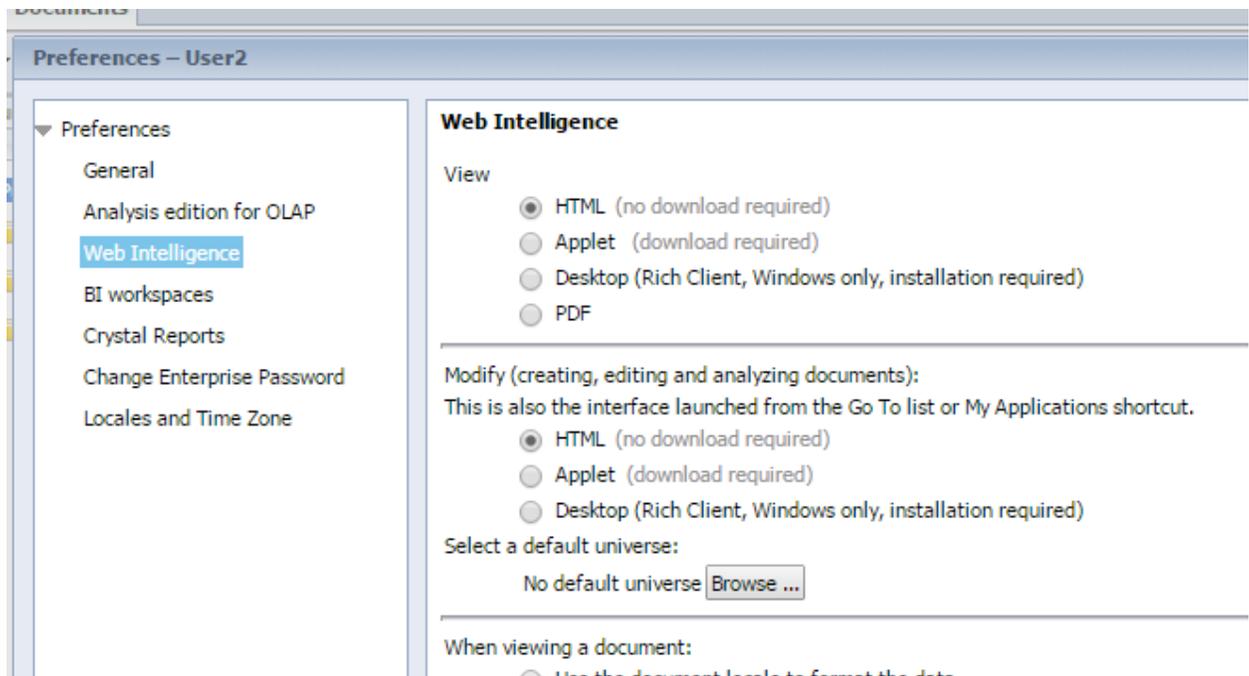
BI Launch Pad

Once you log in, you will be taken to the BI Launch Pad. Your browser tab will display that. This is the starting point for WebI queries or other applications (in the future).

Preferences

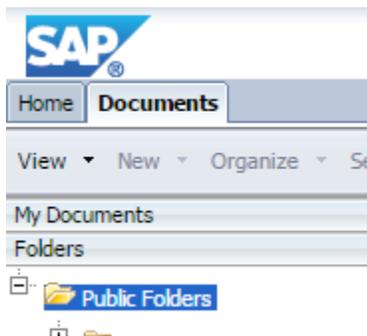
You only need to make this change once:

- Click on Preferences (top right, by your name).
- Click on Web Intelligence (left pane).
- Change the radio button in the second panel to HTML (default is Applet).
- Click Save & Close.



Moving around in Launch Pad

The main screen within Launch Pad has two tabs: Home & Documents.

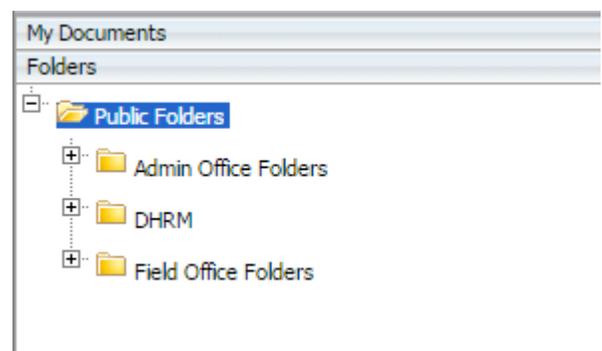


“Home” shows your recently run documents. “Documents” shows the tree structure that contains almost everything else. Click on “Documents.”

There are grey bars in the left pane that allow (or hide) further navigation. Click on “Folders.” It may be at the very bottom of your screen.

Inside the “Folders” bar is the tree structure called Public Folders. This is where all the pre-made canned reports are stored. Look inside DHRM to see some of them. Lots!

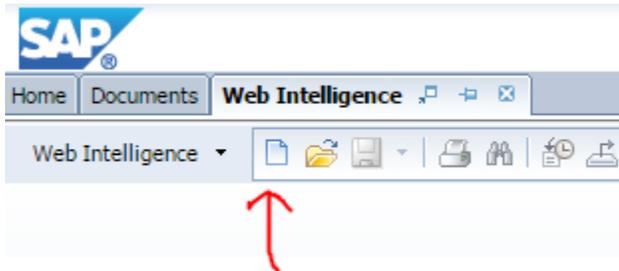
Also inside “Folders” are the Field Office & Admin Office Folders. This is where team-specific reports can be stored. You should only be able to access your own team’s folder or those you supervise.



Building an Ad-hoc Query

To build a custom or ad-hoc query, open the Applications link on the top right and click on Web Intelligence to load the program.

The next screen is mostly blank. Open a new document here

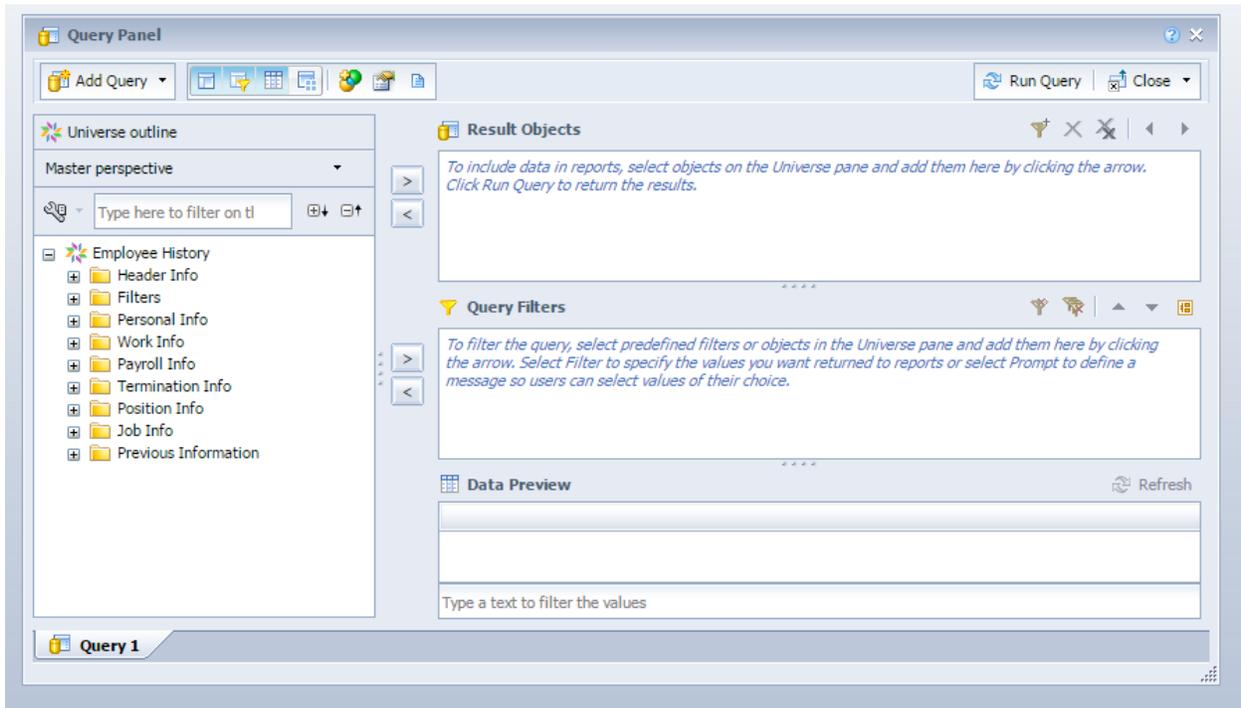


Then click on Universe as the data source.

Your decision about which universe to select depends on the type of data you want to get. For current information--about an employee's status right now-- choose Current Employee (not the .unx one). For historical info, such as how many actions occurred in an agency in FY14, choose the Employee History universe. The other universes are more specialized and not used as frequently.

.unx universes are currently in development by the BIS team. They are the next generation of universe and will allow more functionality.

Once you select a universe, you will see this screen with four sections



Key Elements in the Query Panel

Universe Outline

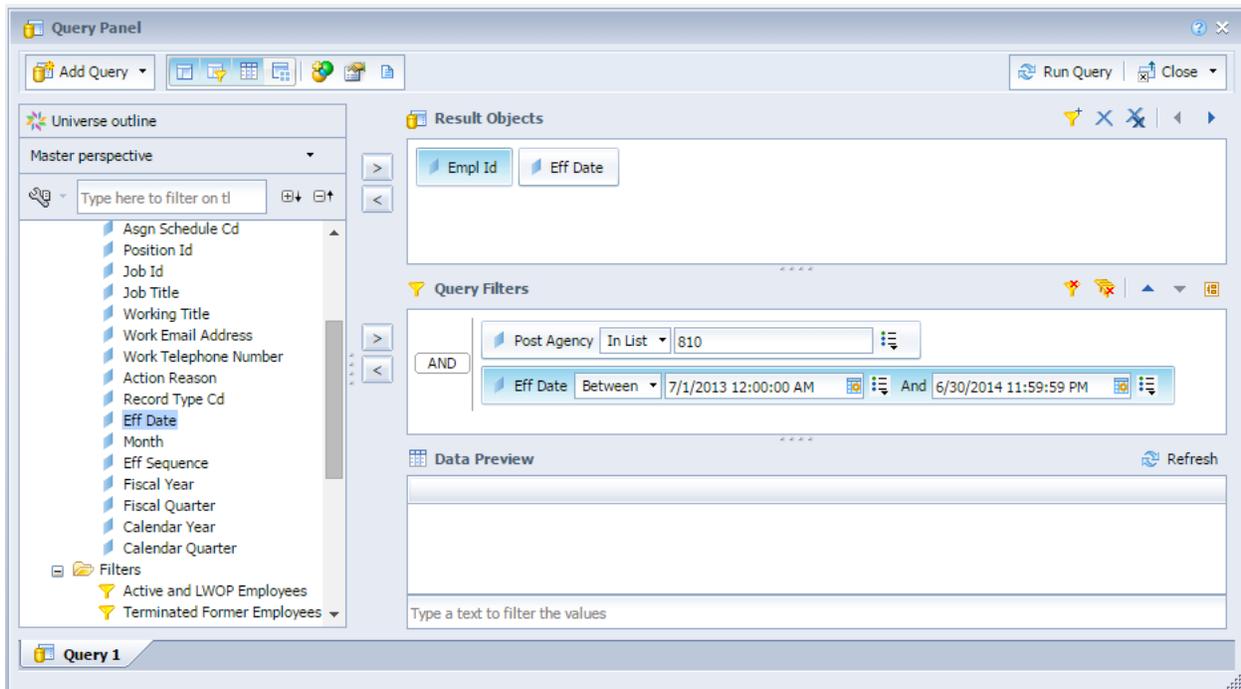
The far left pane shows the fields you can report on in this universe. The first folder, Header Info, contains many common elements.

Result Objects

When you double-click on an element from the Universe Outline, this is where it goes. Only the elements that are included here will show up in the report.

Query Filters

In this section you filter or limit the results. A typical filter is Agency. Another is Eff Date. For instance, if I wanted to see all employees who had an HRE action in Agency 810 during FY 2014, I would do this:



The fields can be dragged into the Query Filters pane either from the Result Objects or the Universe Outline. There are also arrow buttons that move selected fields into or out of panes.

Notice the first drop-down box in the Query Filters fields. Post Agency reads “In List” and Eff Date reads “Between.” There are a dozen other Boolean operators there that will allow you to build whatever logic you need.

Data Preview

Click Refresh in this pane to display a sample of what the full query will pull. Doing this first allows you to check that all the fields you need are present. Once you Run Query (top right) it is somewhat more difficult to make changes.

Key Elements in the Report Design View

Save

You will be logged off of WebI after 45 minutes of inactivity. This is because we have a limited number of shared licenses. If you haven't saved your query, it will be lost. If you intend to keep your query, save it right after you Run Query.

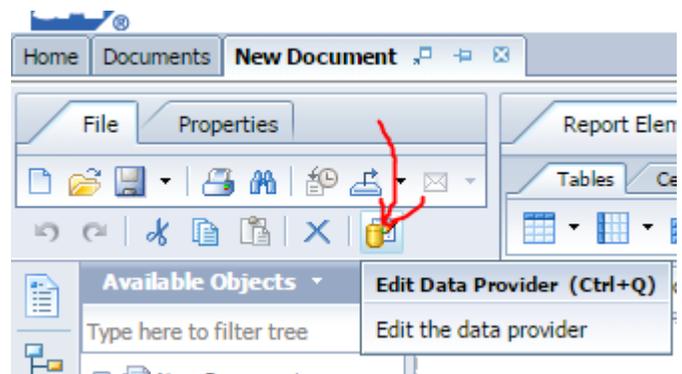
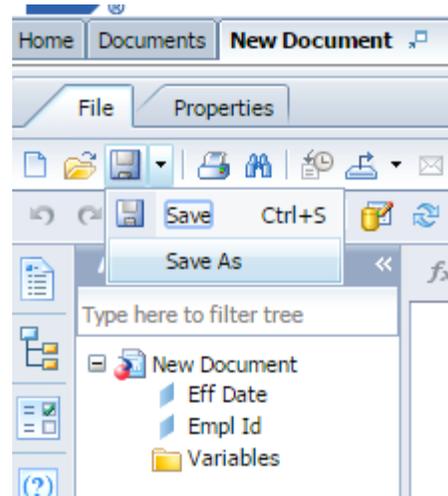
To open a previously-saved document, open from "Home" tab or the Open folder icon. The report will open in Reading Mode, so switch to Design mode (far right side). Then you can click the Edit Data Provider button (see next page).

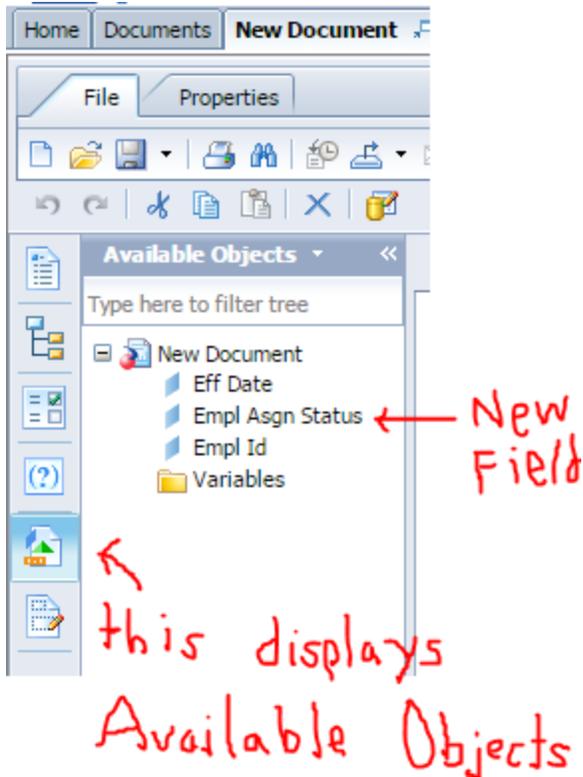
Folder Structure

Each user has a "Favorites Folder" in BI Launchpad. You can save queries to this folder, create new sub-folders within it, and otherwise own it as you would a folder system in Windows.

Editing an Existing Query

To edit a query you have already run, click on this button. You can add or delete fields and change filters. When you Run Query again, any fields that weren't included before won't show up automatically in the results area. To bring them in, drag the field you need from the far left pane called Available Objects.





To insert the new field, click and drag it from the left pane in to the report area so it hovers to the side of the column where you want to insert it. Be sure the small blue rectangle shows that it will insert to the *side* and not *above* the underlying field. See the picture to the left. The picture on the right will replace the Eff Date column, not insert next to it.



Key Functions Within the Report Design View

Count

To insert a count on a field, right-click on a white or grey box that has the results in it (not the header) and “Insert” > “Count.” The count will appear at the bottom of the column and will show up on the last page if there are multiple pages.

Sort

Right-clicking on one of the white/grey boxes displays the “Sort” option for that field, either Ascending or Descending.

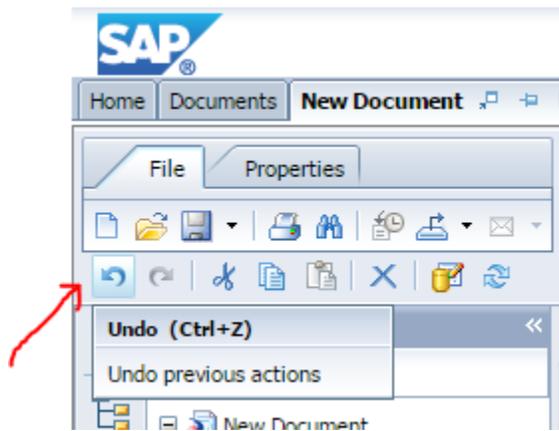
Sections

Reports can be broken into groups or sections. For instance, if a contact list of all employees in an agency needs to be grouped by the field “Supervisor Last Name,” right-click on one of the white/grey boxes with a supervisor’s last name (not the header, but the actual box) and select “Set as section.”

Any counts or summaries (max, min, average, etc) that have been inserted prior to setting a section will carry over after the section is set. Each summary will then consider only the elements in that section, not the whole report.

Undo

Love this feature! Self-explanatory?



Export

Sometimes rather than saving a WebI query, what is needed is just to export the results into an Excel document or a PDF. Click here to see the output options available. CSV files will open in Excel but won't contain any formatting or extra rows/columns.

