BOBJ: END-USER GUIDE
How to Access & Use Business Objects (BOBJ) Reports Available to All City BOBJ End-users
# Table of Contents

Welcome to BusinessObjects Web Intelligence ................................................................. 3
  About BusinessObjects .................................................................................................. 3
    Who should use this guide? ...................................................................................... 3
  Log In and Navigation ................................................................................................... 3
    Launch Pad Navigation ............................................................................................ 3
    Preferences ............................................................................................................... 4
    Documents ............................................................................................................... 5

Working with Reports ................................................................................................... 6
  Opening a report ........................................................................................................ 6

Viewing Web Intelligence Reports .................................................................................. 7
  Report Components .................................................................................................. 7
  Main Toolbar ............................................................................................................ 8
  Status Bar ................................................................................................................ 9
  Side Panel Tabs ........................................................................................................ 9

Side Panel Options ...................................................................................................... 10

Refreshing a Report ...................................................................................................... 11

Filtering Report Data .................................................................................................. 12
  User Prompts .......................................................................................................... 12
  Input Controls ......................................................................................................... 14
  Using Simple Filters .............................................................................................. 15
Welcome to BusinessObjects Web Intelligence

About BusinessObjects

BusinessObjects (BOBJ) is a program with multiple reporting applications such as Web Intelligence and Crystal Reports. These applications give users a different means to create and view reports of data from different sources (like SAP).

This document provides you with information and procedures for using the BOBJ application “Web Intelligence”.

Who should use this guide?

In order to access BOBJ, you must have a role in SAP that tells the system what level of access you should have. There are two main roles for BOBJ: End User and Super User. This document is geared specifically for the end user role. It contains information about how to navigate in the system, how to open a report and how to filter and refresh the data in the report.

Log In and Navigation

To access BOBJ WebI reports, go to http://ireport.city. To use BOBJ, you will need to be logged into the City's network (either directly through a PC or through VPN). Also, this functionality is only supported in the City if used with Microsoft Internet Explorer.

Business Objects uses single sign-on security. This means that when you are logged into the network, it will automatically log you into BOBJ when to access the web application.

Launch Pad Navigation

When you go to http://ireport.city the BI launch pad appears in your web browser.

From here you can choose the application you want to view, set your preferences and access the documents.
From the top of the page, you have the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Tab</td>
<td>Displays the BI Launch Pad home page.</td>
</tr>
<tr>
<td>Documents Tab</td>
<td>Displays the folders you have access to in BOBJ.</td>
</tr>
<tr>
<td>Applications</td>
<td>Allows you to switch between available applications such as Crystal Reports and Web Intelligence. You will only see the application you have been given access rights to.</td>
</tr>
<tr>
<td>Help menu</td>
<td>Displays the online help for BOBJ</td>
</tr>
<tr>
<td>Preferences</td>
<td>Allows you to set how information is displayed. See next section for information on options.</td>
</tr>
<tr>
<td>About</td>
<td>Displays product and sales information about BI launch pad.</td>
</tr>
<tr>
<td>Log Out</td>
<td>Logs the user out.</td>
</tr>
</tbody>
</table>

Preferences

On the preferences screen, select the Web Intelligence section.

From here, you can change the way reports are viewed:

HTML will be the default. This is the preferred option for viewing reports. It doesn’t require a download and can be viewed easily. Applet requires Java to be installed on your computer. Desktop is not an option for viewing WebI reports. PDF will not allow you to make changes to reports.
Another preference you may want to change is how WebI saves reports to Excel. If you export your reports to Excel, choose both options to see what differences there are.

Select a priority for saving to MS Excel:
- Prioritize the formatting of the documents
- Prioritize easy data processing in Excel

Documents

To view the available reports, you will select the Documents Tab at the top of the page.

The left panel contains a list of folders where reports are stored. To access these, select the plus (+) sign to the left of the folder. Keep expanding until the full list of 1-SAP folders are visible.
Working with Reports

Opening a report

There are two areas an end user looks for reports in the list: 1-Citywide Reports and by Bureau name. Citywide reports were developed for use by anyone in the City. They can be modified to pull data for any bureau. The bureau report folders contain reports which were designed by a bureau super user. These reports were designed to meet bureau-specific reporting needs, but they are available to anyone in the City with an end user or super user role.

To open a report, first select the folder where the report resides.

Select a report on the right side of the page and double click it to open the report.

The report will open in a new tab at the top of the page.
**Viewing Web Intelligence Reports**

When you open a Web Intelligence report, the report appears in a viewer. The following sections provide information about the Web Intelligence toolbar and give instructions on how to work with the navigation map, display user prompts, find text, and drill down data in your Web Intelligence documents.

**Report Components**

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main toolbar</strong></td>
<td>You use the main toolbar to open, save and print documents, track data changes and display the report outline.</td>
</tr>
<tr>
<td><strong>Side Panel</strong></td>
<td>The Side Panel groups several panes that provide different views of the current document.</td>
</tr>
<tr>
<td><strong>Status Bar</strong></td>
<td>The <strong>Status Bar</strong> appears beneath the <strong>Report Panel</strong> and allows you to perform actions such as activating data tracking or changing the display mode. It can be activated and deactivated in the View menu of the Properties tab.</td>
</tr>
<tr>
<td><strong>Report Filter toolbar</strong></td>
<td>This toolbar is used to add simple filters to reports.</td>
</tr>
</tbody>
</table>
Main Toolbar

At the top of the report viewer is the main toolbar. Below is a list of the options available on this toolbar. As an end user, many of the buttons are greyed out and not available.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Open" /></td>
<td>Open</td>
<td>Allows you to open a document.</td>
</tr>
<tr>
<td><img src="icon" alt="Print" /></td>
<td>Print</td>
<td>Allows you to open or save a document to PDF.</td>
</tr>
<tr>
<td><img src="icon" alt="Reading Options" /></td>
<td>Reading Options</td>
<td>Allows you to toggle between two views of the report. <strong>HTML</strong> displays the document in a paginated view. <strong>PDF</strong> displays a PDF of the document. The PDF created will be of the entire document if there is more than one tab.</td>
</tr>
<tr>
<td><img src="icon" alt="Find" /></td>
<td>Find</td>
<td>Allows you to search for text in the document.</td>
</tr>
<tr>
<td><img src="icon" alt="Export to PDF for printing" /></td>
<td>Export to PDF for printing</td>
<td>Creates a PDF version of the document so that you can print it.</td>
</tr>
<tr>
<td><img src="icon" alt="Undo" /></td>
<td>Undo</td>
<td>Reverses the previous action.</td>
</tr>
<tr>
<td><img src="icon" alt="Redo" /></td>
<td>Redo</td>
<td>Reverses the undo action.</td>
</tr>
<tr>
<td><img src="icon" alt="Refresh Data" /></td>
<td>Refresh Data</td>
<td>Retrieves the most up-to-date data from the document's data source. You must have the necessary rights, and the document must contain the necessary data source information before you can refresh the document.</td>
</tr>
</tbody>
</table>
**Status Bar**

At the bottom of the report page is the Status Bar. From here, you can view the pages, change display mode, zoom and see when the last refresh was completed.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Page 1 of 1+" /></td>
<td><strong>Navigation</strong></td>
<td>Allows you to move through the pages of a document. If there is a + sign next to the second page number, this indicates the report is more than one page. If you click on the “Page 1 of 1+” text, you will be able to enter a page number for direct navigation.</td>
</tr>
<tr>
<td><img src="image" alt="Display Options" /></td>
<td><strong>Display Options</strong></td>
<td>Allows you to toggle between Quick Display Mode and Page mode. Page mode gives you a preview of how it would look when printed.</td>
</tr>
<tr>
<td><img src="image" alt="Zoom" /></td>
<td><strong>Zoom</strong></td>
<td>Allows you to zoom in or out on the document.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh button" /></td>
<td><strong>Refresh button</strong></td>
<td>This button shows the last date the report was refreshed with the latest data. Click on the button to trigger a new refresh.</td>
</tr>
</tbody>
</table>

**Side Panel Tabs**

The tabs allow you access to panes in which you can view and configure document information and objects.
**Side Panel Options**

The side panel of the Web Intelligence screen allows you to modify the report data, find information and view the structure of the reports.

**To hide or show the left panel:**
Click the little arrow button on the left of the page (see screenshot on left).

**Document Summary**
The document summary provides lots of information about the report you are viewing. This summary includes: general information, statistics, and default settings for the report.

**Navigation Map**
The navigation map allows you to view the sections of the report and quickly jump to a specific section.

**Input Controls**
Input controls provide a way to quickly add or remove certain criteria from a report to change the output.

**User Prompt Input**
User prompts provide a way to pull different data into a report; for example, change the date parameters of the report.
Refreshing a Report

Anytime you open a report, you will need to refresh it with the current data. Unlike reports in SAP which contain data in real time, BusinessObjects uses data that was current as of yesterday’s close of business.

The report status bar, at the bottom of the report, will show the last time the report was refreshed. You will likely need to refresh the report every time you open it.

To refresh the report

1. Select the Refresh Data button. This will open the Prompts window.

2. Make any changes in the prompts (see the section on User Prompts). If no changes need to be made, just click the OK button on the bottom of the window.

3. The status bar at the bottom of the report should now reflect the current date and time.

NOTE: The more items you select to filter the data, the less time it will take to refresh the report. Citywide reports might be set up to give you too much information. Narrow it down to your bureau’s specific information before you refresh the report.
Filtering Report Data

There are a number of ways for users to filter the data found in a report. Super users set up bureau-specific reports with input controls, user prompts and simple filters. You will be given specific direction on when to use these different filters to run your reports.

User Prompts

Prompts gather information from users. For Web Intelligence reports, this information determines what data to pull from the data warehouse and display in the report. When you change the prompts in a report, you must refresh the report to get the current data.

A prompt is a special type of report filter. It is a dynamic filter that displays a question every time you refresh the data in a document. You answer prompts by selecting the value(s) you want to view before you refresh the data. Web Intelligence retrieves only the values you specified from the database and returns those values to the reports within the document.

Prompts allow multiple users viewing a single document to specify a different sub-set of the database information and display it in the same report tables and charts. Prompts also reduce the time it takes for the data to be retrieved from the database.

User prompts can be accessed on three different places in the report.

Click any of these three buttons to refresh the report and pull up the User Prompts.
To edit user prompts

1. Open the User Prompt window.

2. Your super user should have given you instructions on what prompts you need to manipulate for each report. For example, you might have to select a particular date range, to see information relevant to your reporting needs.

3. Select the appropriate hierarchy and corresponding node you want to run in the report.

   **NOTE:** When you select a hierarchy, the node you select must fall under the top-level hierarchy you selected.

4. You may need to click on the **Refresh Values** button to see a populated list in the selection window. Choose the fields you want to include in the report. If you have multiple selections, hold down the CTRL key while selecting the data.

5. Click the arrow button to move the fields over to the right side of the window.

6. When finished, click OK at the bottom of the window to refresh the report with the updated selections.

**NOTE:** If you are using the Citywide reports double check that your correct hierarchies and nodes have been set. These have been limited on Citywide reports due to time constraints in refreshing the reports.

The report will then refresh with the data you selected. A window will appear which looks like the one on the right.
Input Controls

Input controls are another way to filter information in a report. Your super user might have placed input controls in the report as a way for you to filter the information. Input controls allow the user to select multiple data points in combination when viewing the report. A benefit to using input controls is that it displays the filtered information in the report immediately.

For example, the report on the right has an input control set for Open DPO(s). If I wanted to change this to show all DPOs, I could check the box for Select (All).

To display input controls

1. Open the report that you want to view.
2. Open the side panel and select the Input Controls tool.
3. Place a checkmark in the box next to the items you want to include in your report.

The report will automatically update to include only the items selected.
Using Simple Filters

Another way to filter your report is by using a Simple Filter. Your super user may have added these simple filters to your report already.

**NOTE:** The difference between a simple filter and the input control is that the simple filter only allows you to select one data point to filter the report on. In contrast, the input control allows you to select multiple data points.

To view the simple filter toolbar

The simple filter toolbar is located at the top of the report viewer.

To add a simple filter to the report

Click on the Add simple filter button on the simple filter toolbar.
Select the filter you want to add to the report from the drop down menu. For example, in this contract report, I may want to filter based on the contract manager field from the report.

It will be added to the report.

**NOTE:** You can add multiple simple filters to the report. Just click the icon again and add another field.

**To use the simple filter tool**

Use the drop down menu and select the item. The report will automatically update with the filtered data.