SVA❀NYC

Getting started with SVA BO Web Intelligence (WebI) Reports

Introduction

This document provides information and instructions for accessing and using Business Objects (BO) Web Intelligence (WebI) reports and the BI launch pad. The BI launch pad runs in a web browser and is used to view, organize, and work with WebI reports.

Accessing BO WebI

SVA's BO WebI reporting solution is accessible online at **http://colleaguebo:8080/BOE/BI/** You must be an authorized user with a valid BO account to access BO WebI.

BI WebI is accessible inside of SVA Administrative network. Internet Explorer (IE) browser provides a single sign on with your PC login/password. If you are accessing BO WebI in any other browser you will need to login using Windows AD authentication with the same user name and password as for your PC.
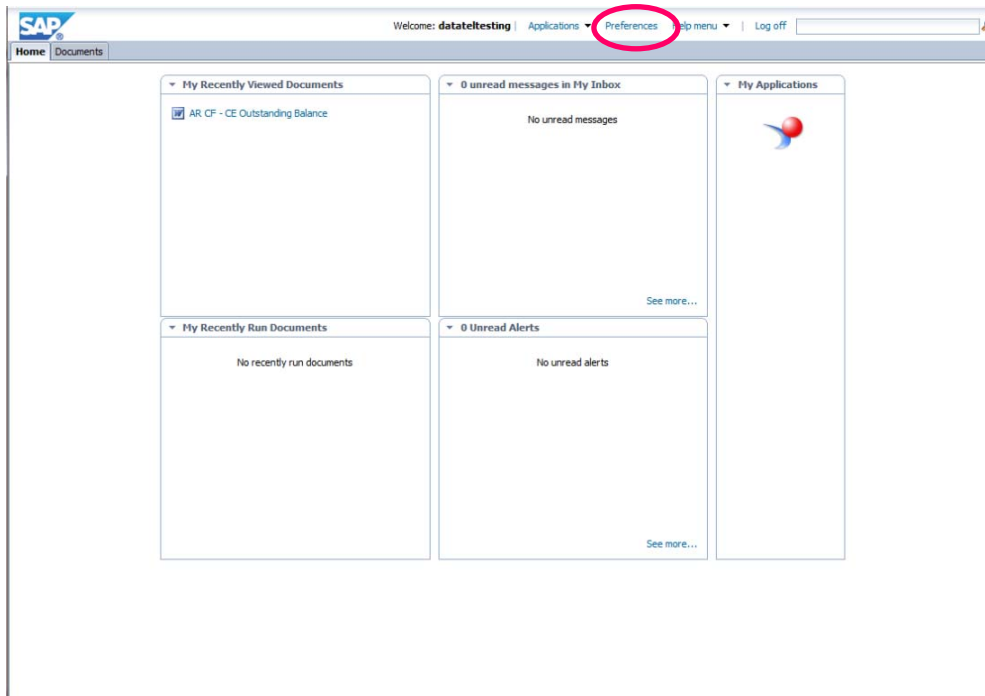
Logging Out of BO WebI

Click on the Log off link located in the upper right corner of the page to log out of BO WebI.
Note: Simply closing the browser window does not close your WebI session.

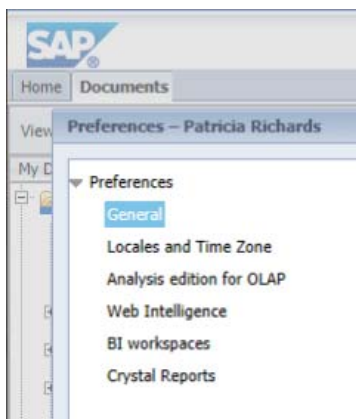## Setting Your Web Intelligence Preferences – the 1st time you login

1. Click on the **Preferences** link located in the upper right corner of the header panel to access personal preference set up.
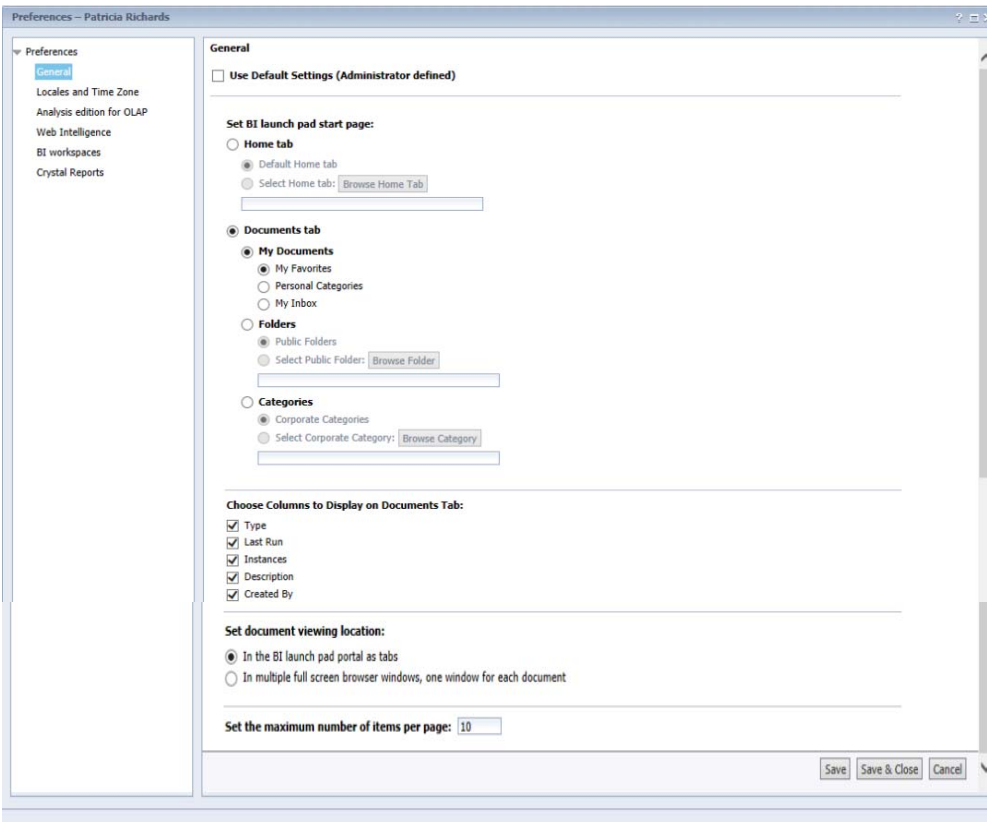
You may set personal preferences for "**General"** and "**Web Intelligence**."
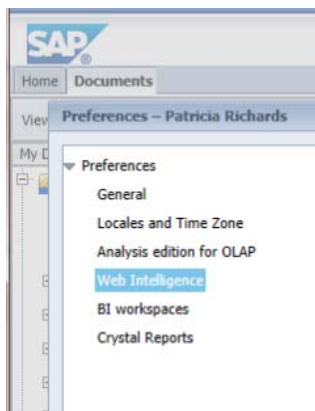
Please do not modify any other.

2. Under preferences, select "**General**"

The "**General**" page controls the first page opened upon logging into WebI. This page is also accessed once you click on the `Home` button located in the top left hand corner of the BI launch pad. You may use the "**General**" page to set the numer of items per page.
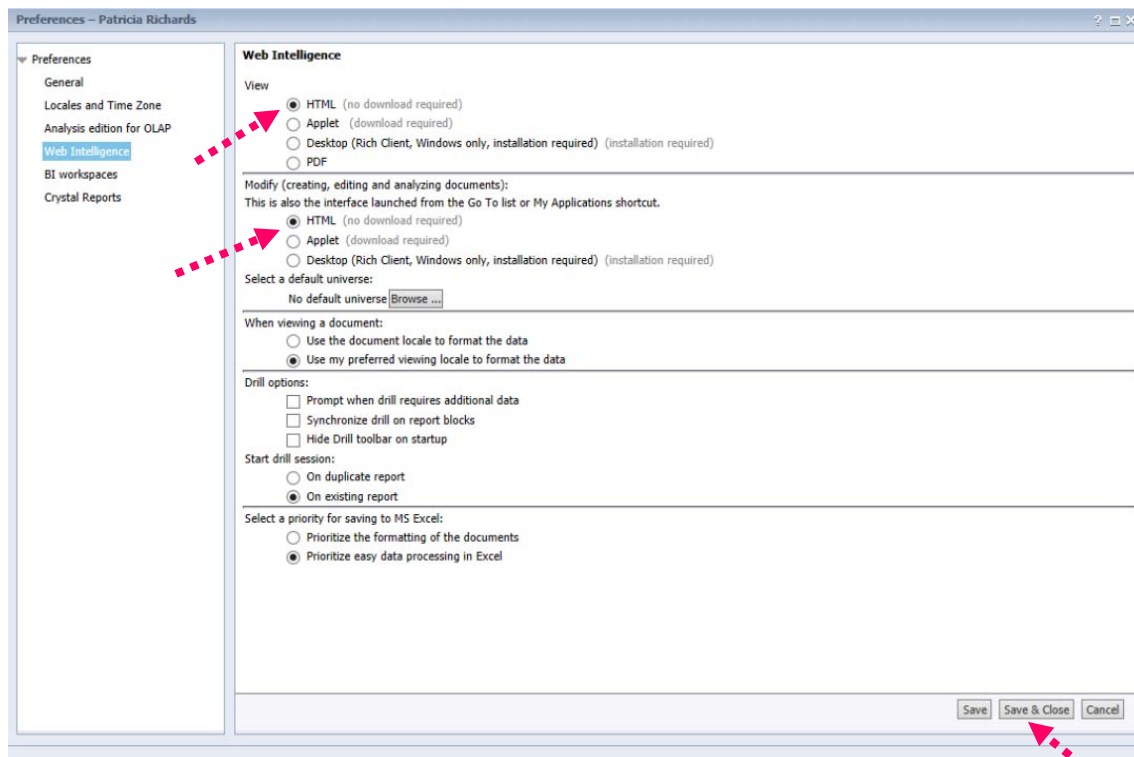

3. Under preferences select **Web Intelligence**.

The "**Web Intelligence**" page allows you to choose the interface you want to use for viewing and modifying reports.

4. Under **View** and **Modify (creating, editing and analyzing documents)** select HTML.
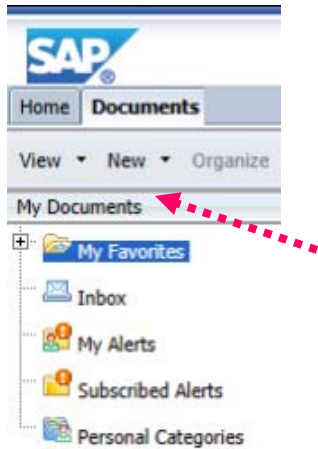
   NOTE: You must select HTML in both locations – not setting these preferences will result in errors when using BO WebI reports.

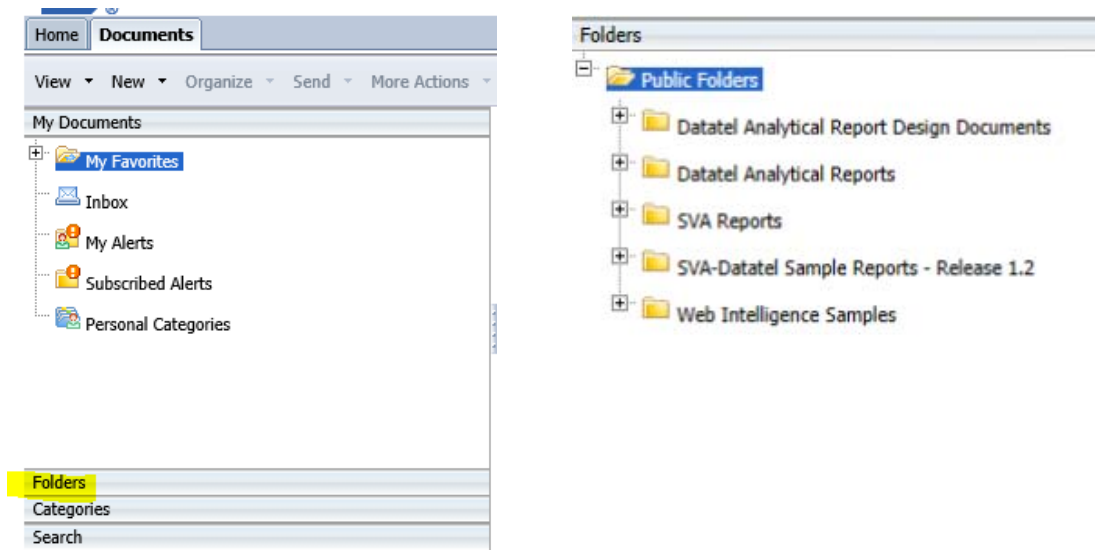5. Click the ![Save & Close] button to save your changes.

Locating WebI Reports

Use the **Documents** tab located in the top left hand corner of the BI launch pad to locate the folders containing your reports.

Your personal reports are located in the **My Favorites** folder under **My Documents** .

To view the public reports located in the **SVA Reports** folder, click the **Folders** tab located at the bottom left hand corner of the BI launch pad.

Viewing WebI Reports

To run/view a WebI report:

1. Accessing a report

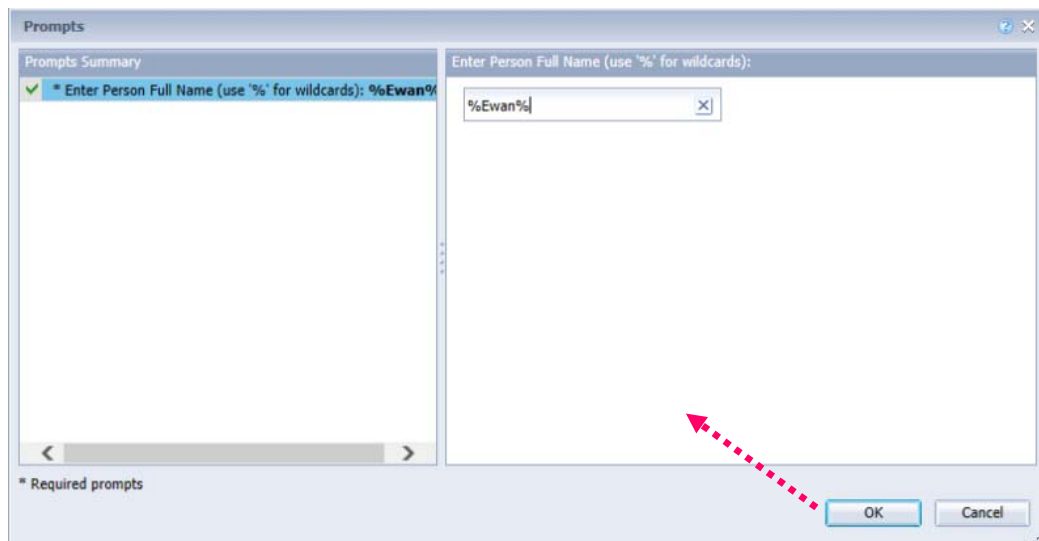-   Double click on the report name to open the report.

OR

-   Click on the report name

-   Click on the View ▾ menu from the toolbar
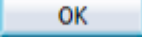
-   Select "**View**" from the View ▾ menu.

OR

-   Right click on the report name
-   Select "**View**" from the shortcut menu.

Note: There may be prompts for information needed to run the report. You must answer the prompt(s) in order to proceed.

2. Enter the information required by the prompt.

3. Click the [OK] button to continue. The report will then be displayed on the screen.

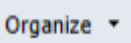4. To close the report click on [x] located on the report tab.

Saving WebI Reports

To save/export a report as an excel, PDF, CSV or text file:

1. Click on the export [icon] menu located on the Web Intelligence viewer toolbar.

2. Select "**Export Current Report As**" from the export menu.

3. Select the desired output, that is, PDF, Excel, CSV or text from the "**Export Current Report As**" menu.

4. Click "**Open**" from the download dialogue box located at the bottom of the screen.

5. Save the report.

Modifying WebI Reports

WebI reports cannot be modified in the **SVA Reports** folder. They must be copied to your personal "**My Favorites**" folder.

- **Copying WebI Reports to Your "My Favorites" Folder**

   1. Click on the report name.

   2. Click the [Organize] menu from the tool bar.

   3. Select "**Copy**" from the "**Organize**" menu.

   4. Click on the "**My Favorites**" folder

   5. Select "**Paste**" from the "**Organize**" menu.
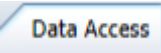
   OR

   1. Right click on the report name

2. Select "**Copy**" from the short cut menu.

3. Right click the "**My Favorites"** folder.

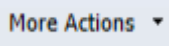4. Select "**Paste"** from the short cut menu.

- **Modifying WebI Reports in "My Favorites" folder**

    1. Right click on the report name.

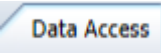   2. Select "**Modify**" from the short cut menu.

        Note: There may be prompts for information needed to run the report. You must answer the prompt(s) in order to proceed.

    3. Click on the Data Access tab located in the tool bar.

    4. Click the Edit button to display the query panel.

    5. Modify the query selection and report output as desired.

    OR

    1. Click on the report name.

    2. Click the More Actions ▼ menu from the tool bar.

    3. Click "**Modify**" from the "**More Actions**" menu.

        Note: There may be prompts for information needed to run the report. You must answer the prompt(s) in order to proceed.

    4. Click on the Data Access tab located in the tool bar.

    5. Click the Edit button to display the query panel.

    6. Modify the query selection and report output as desired.