



Introduction to BusinessObjects 4.1

This guide highlights the basic functionality of the BusinessObjects reporting tool, as well as the differences between version 3.1 and the newly redesigned version 4.1. Most functionality remains the same, but the visual representation is slightly changed.

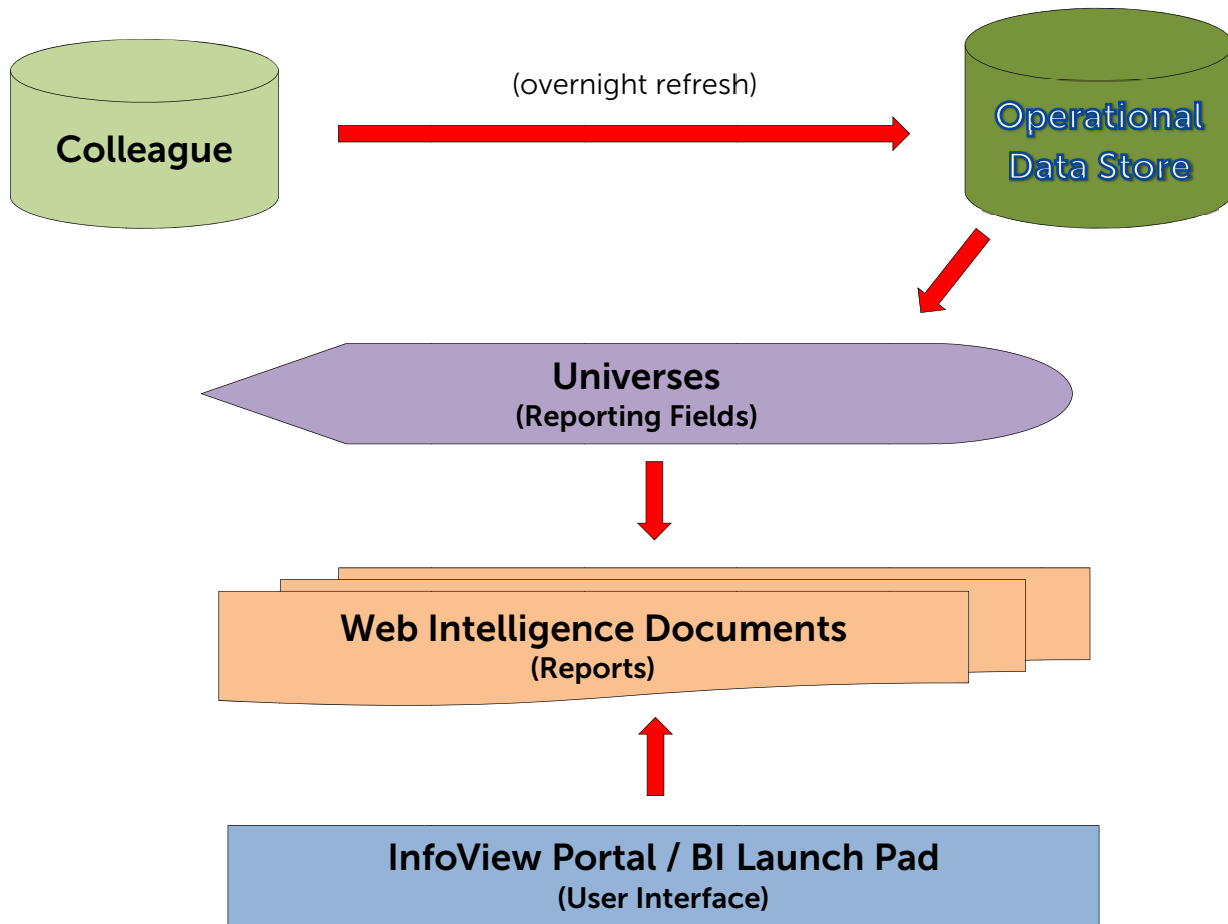
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DEFINITIONS AND REPORTING STRATEGY OVERVIEW

Components for Reporting



Definition: Operational Data Store (ODS)

A separate repository from the main Colleague database that contains a snapshot of Colleague data captured at a given point in time and updated each night.

Definition: Universe

Universes hold select metadata from the Colleague database and make data fields ("objects") available through web reporting tools such as BusinessObjects. Universes include fields from the major Colleague applications (Student, HR, Finance, Core, Financial Aid, etc.).

Definition: Web Intelligence Documents (Reports within BusinessObjects)

A web-based query and analysis tool providing drag-and-drop functionality that allows you to view a report's structure and underlying details, filter information, and create and position new tables and charges.

DIFFERENCES BETWEEN INFOVIEW AND THE BI LAUNCH PAD

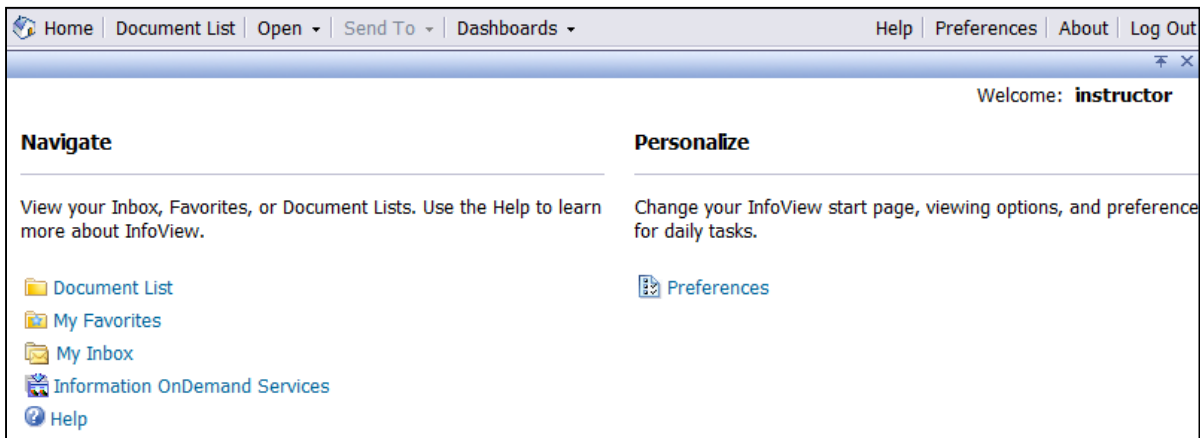
InfoView vs. BI Launch Pad

InfoView (or, the BusinessObjects 3.1 portal), a web-based portal for accessing Web Intelligence documents (and many other things), is now called the BusinessIntelligence (BI) Launch Pad.

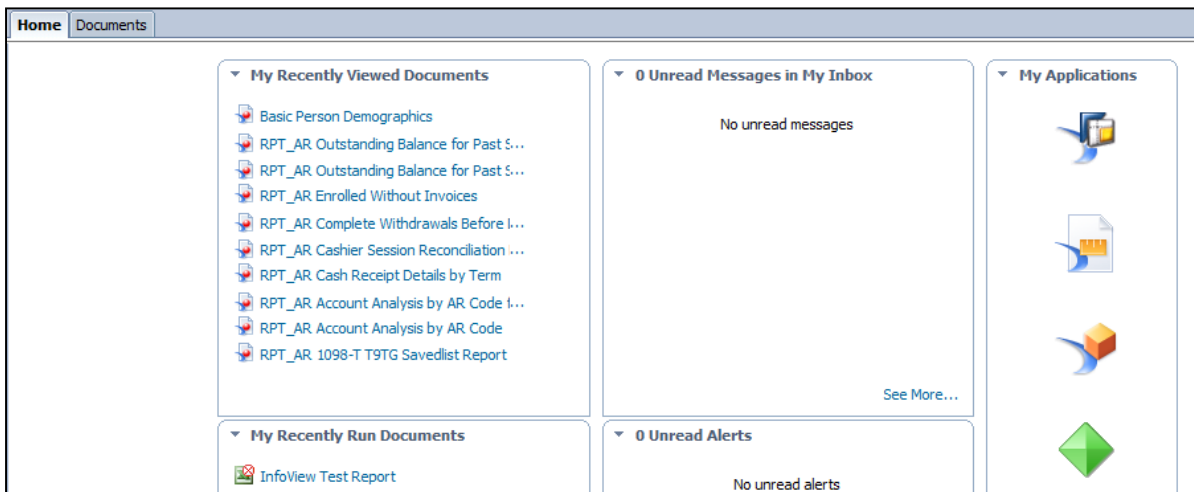
Information about how to access the new BI Launch Pad is provided by the Colleague Computing office.

Home Screen

InfoView's Home screen showed a general folder structure and links to documents, favorites, and inbox folders, as well as a link to account preferences:

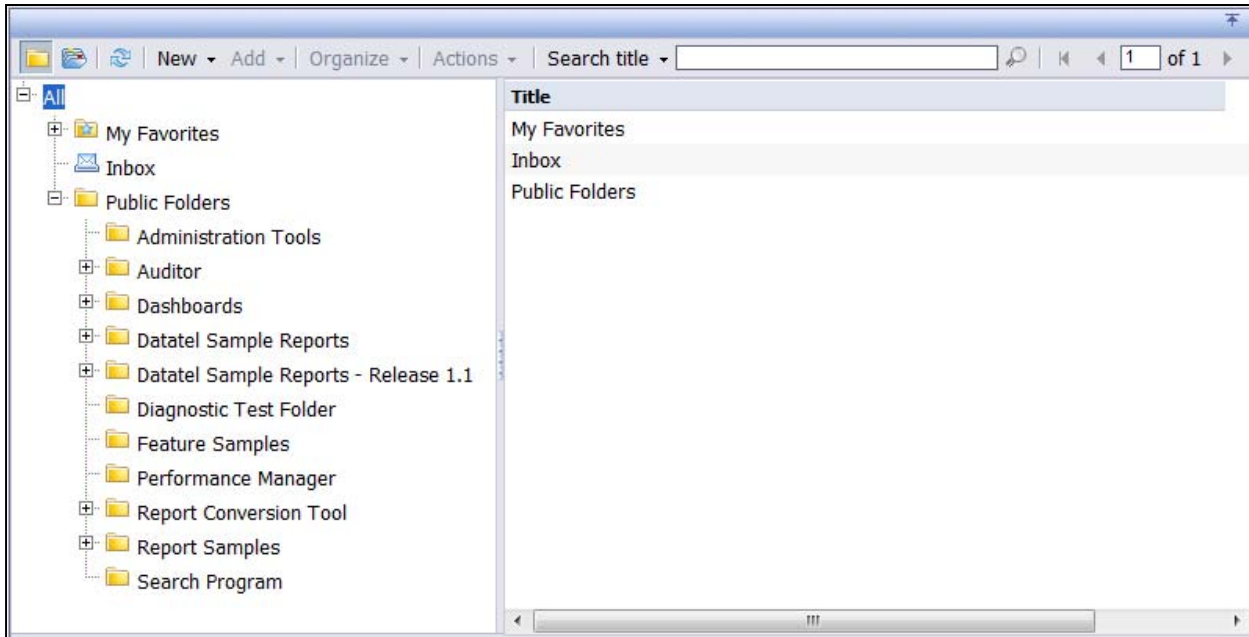


The new **Launch Pad** Home screen shows recently viewed and run documents, as well as unread messages in a user's inbox. Documents and reports are now displayed in tabs across the top of the screen, which a user can switch between at any time.

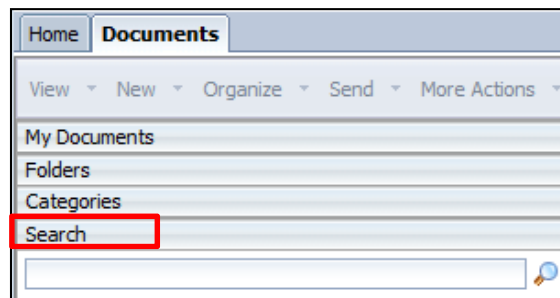
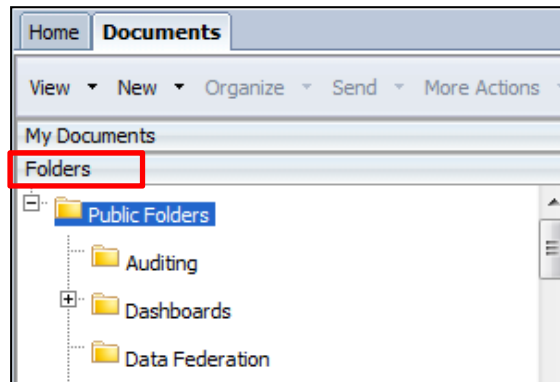
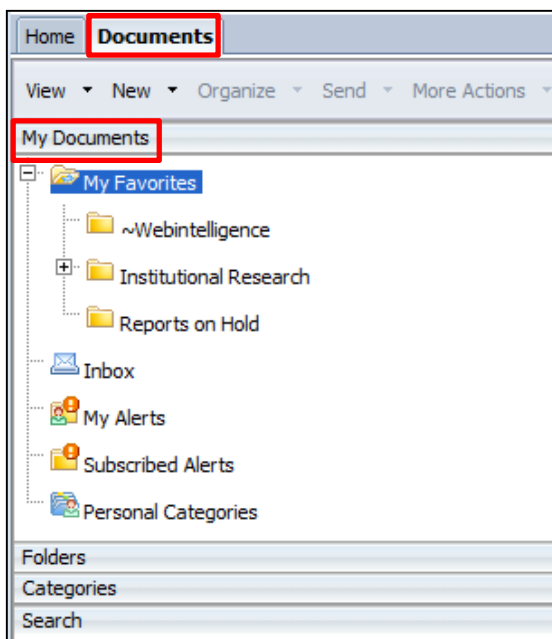


Document List

InfoView: The reports you can access are structured in folders and sub-folders (similar to Windows Explorer).



Launch Pad: On the Documents tab, reports are now separated into personal and public categories. To see your Favorites and Inbox folders, click on "My Documents." To see Public Folders, click on "Folders." To search for documents, click on "Search."



Preferences

In **InfoView**, the best view and editing tool was “Interactive” since no downloading was required. In **Launch Pad**, use “Web” instead.

InfoView

The screenshot shows the 'Preferences - Administrator' window for InfoView. The 'Web Intelligence' section is expanded. Two red boxes highlight specific settings: the first box highlights the 'Select a default view format:' section where 'Interactive (no downloading required)' is selected; the second box highlights the 'Select a default creation/editing tool:' section where 'Interactive (no downloading required)' is selected. Other options include 'Web (no downloading required)', 'PDF (Adobe AcrobatReader required)', 'Advanced (Java 2 required)', 'Desktop (Web Intelligence Rich Client required)', and 'Web Accessibility (508 Compliant)'. A 'Browse' button is visible at the bottom.

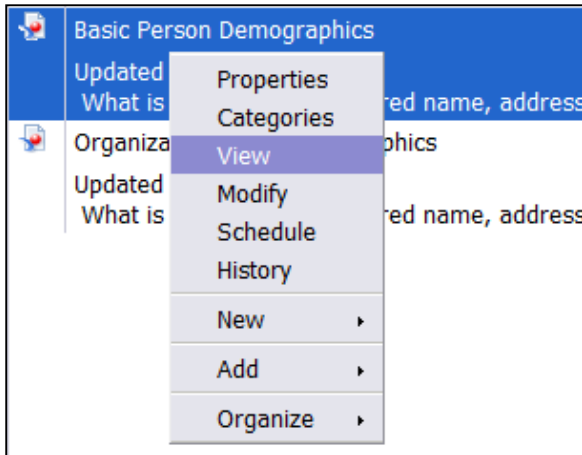
Launch Pad

The screenshot shows the 'Preferences' window in Launch Pad. The 'Web Intelligence' section is expanded. Two red boxes highlight specific settings: the first box highlights the 'View' section where 'Web (no download required)' is selected; the second box highlights the 'Modify (creating, editing and analyzing documents):' section where 'Web (no download required)' is selected. Other options include 'Rich Internet Application (download required)', 'Desktop (Windows only) (installation required)', and 'PDF'. A 'Browse ...' button is visible at the bottom.

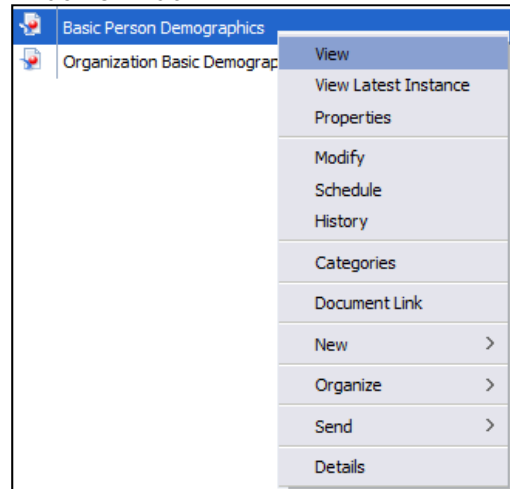
Opening Reports

Functionality remains the same. Right-click the report title and select "View".

InfoView

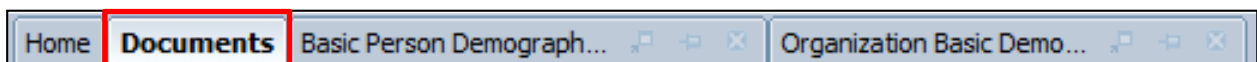


Launch Pad



Opening Multiple Reports

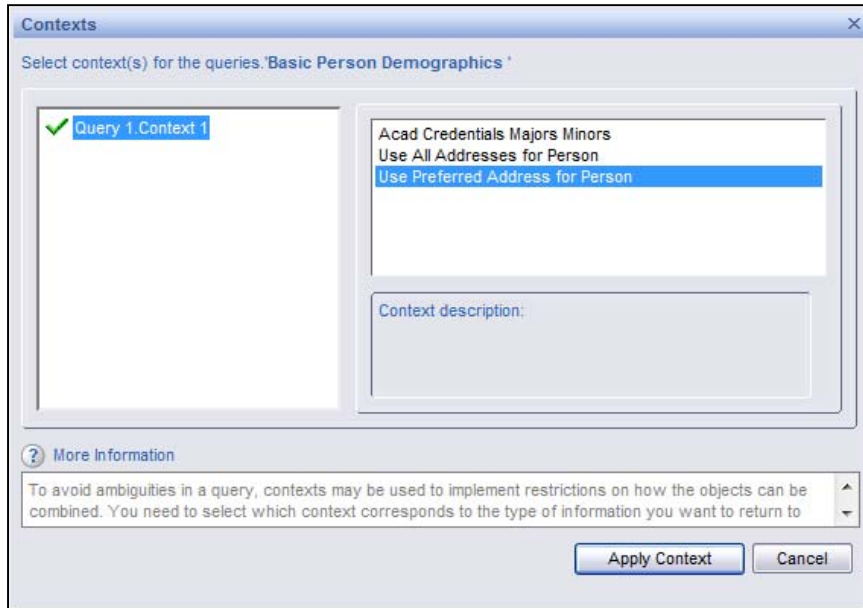
In **Launch Pad**, you may open multiple reports in the same session. Use the tab structure at the top of the screen to navigate between your home tab, documents tab, and any open report tabs. This functionality does not exist in **InfoView**.



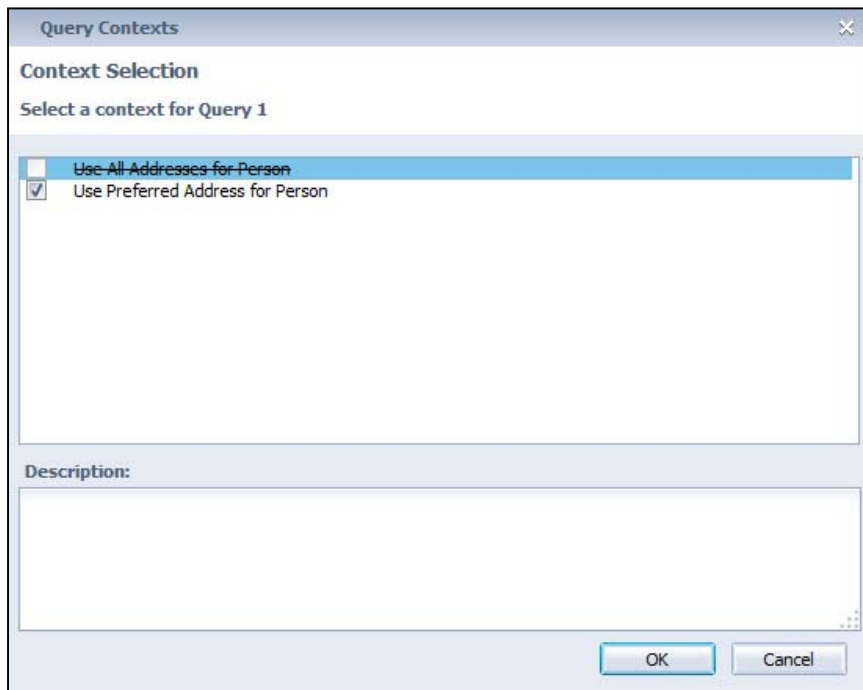
Responding to Context Prompts

Context prompts look slightly different in **Launch Pad**. Instead of a solid blue bar to indicate the selected option, you must now place a check box in the context(s) you wish to use.

InfoView



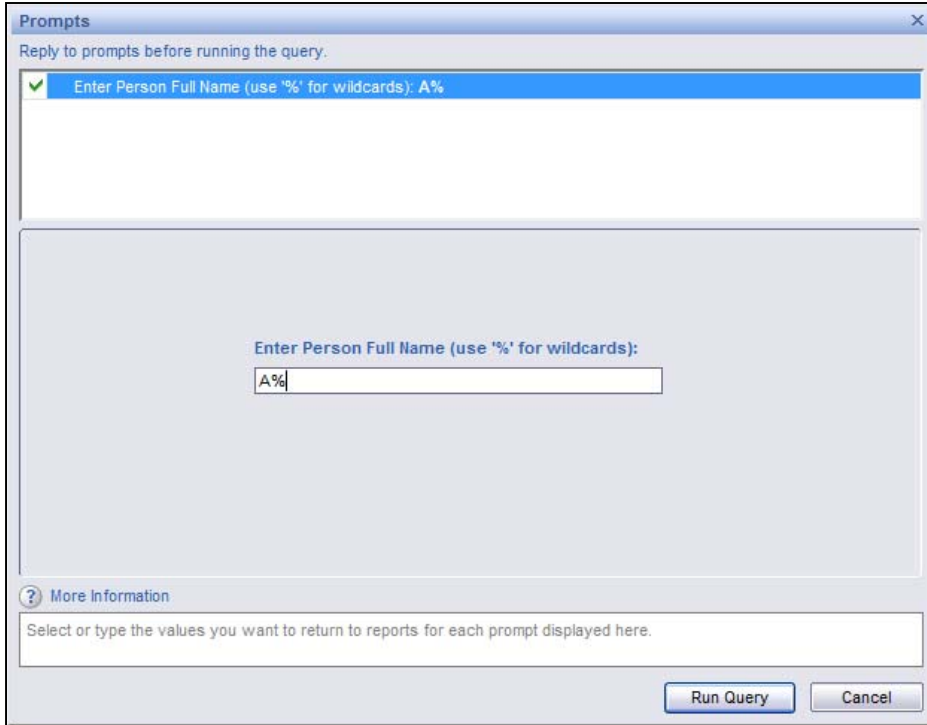
Launch Pad



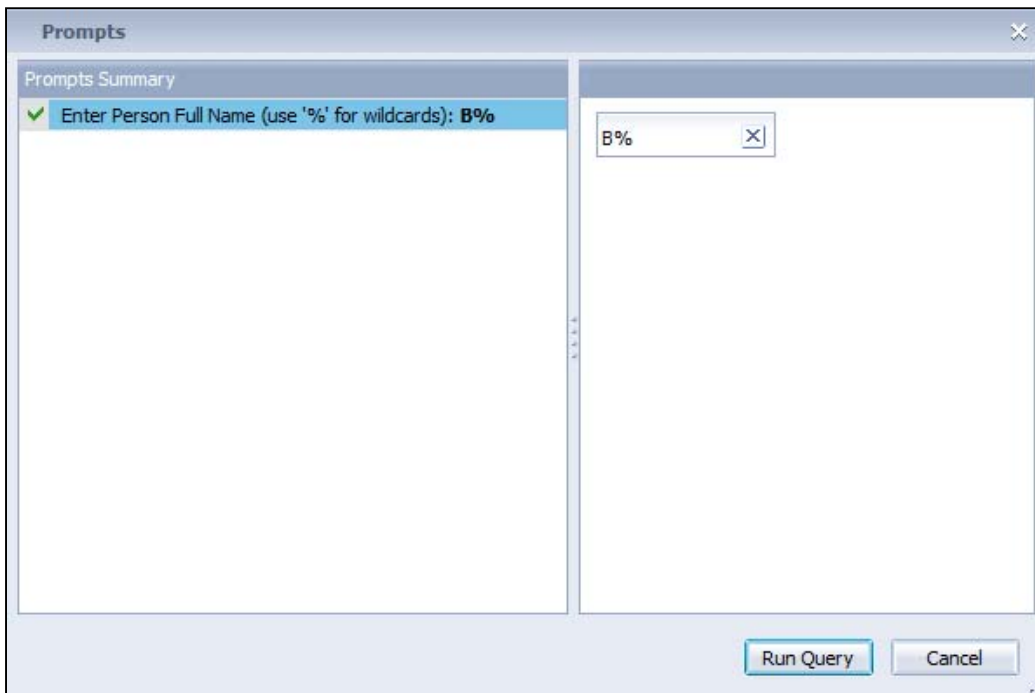
Responding to Report Prompts

The format of report prompts has changed from a top-and-bottom panel to a left-and-right panel in **Launch Pad**.

InfoView



Launch Pad



Navigating Report Results

Launch Pad now utilizes two different toolbars to navigate through the report, zoom, refresh, etc. **InfoView** has only one main toolbar at the top of the report, while Launch Pad has one on the top and on the bottom of the report. Hovering over icons will provide descriptions of the buttons.

InfoView



Launch Pad (top)



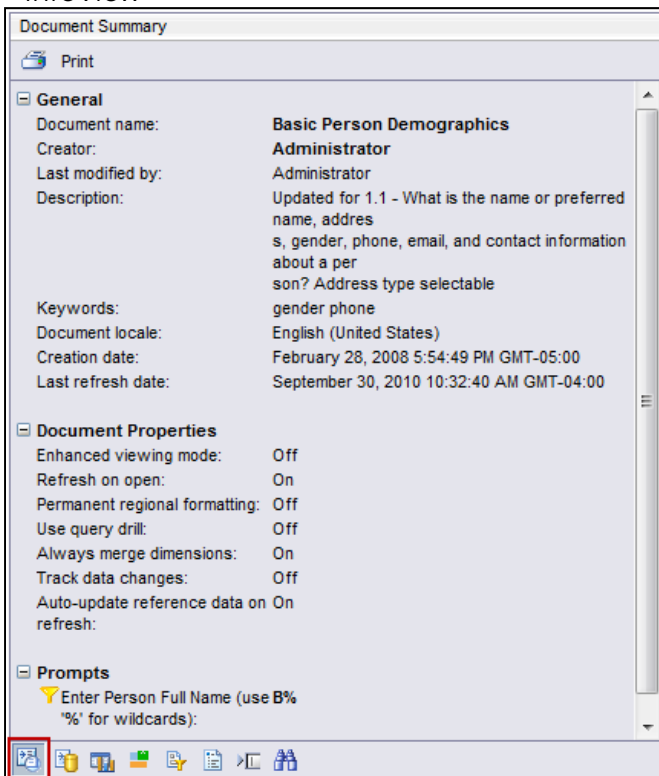
Launch Pad (bottom)



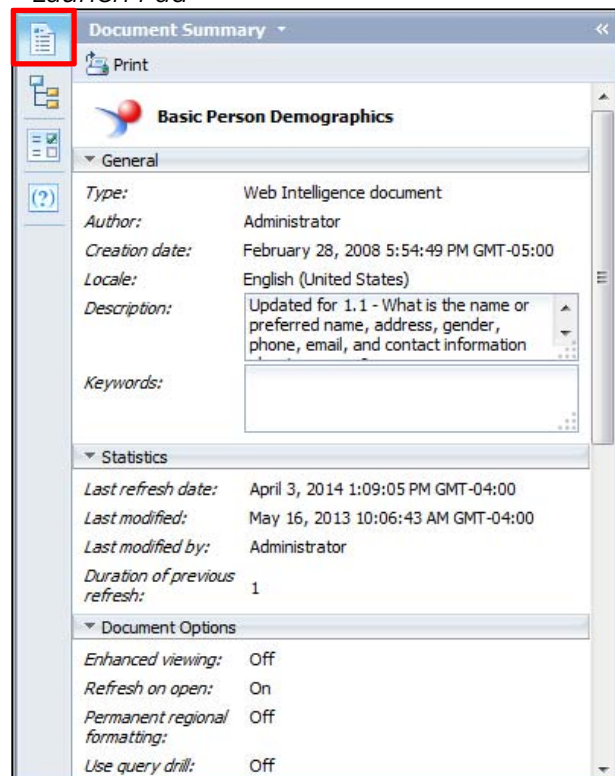
Viewing the Document Summary

Items such as Document Summary appear on the left side of the screen. The buttons to toggle between item options now appear at the top left in **Launch Pad** instead of at the bottom in **InfoView**.

InfoView



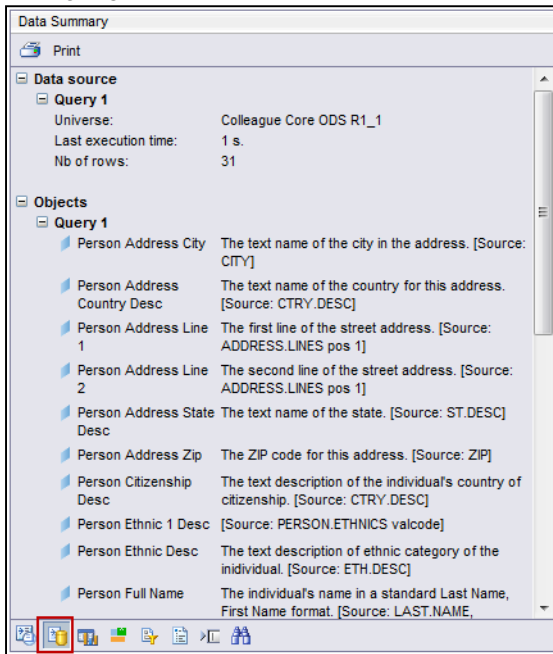
Launch Pad



Viewing the Data Summary

The Data Summary is no longer available in BI **Launch Pad**.

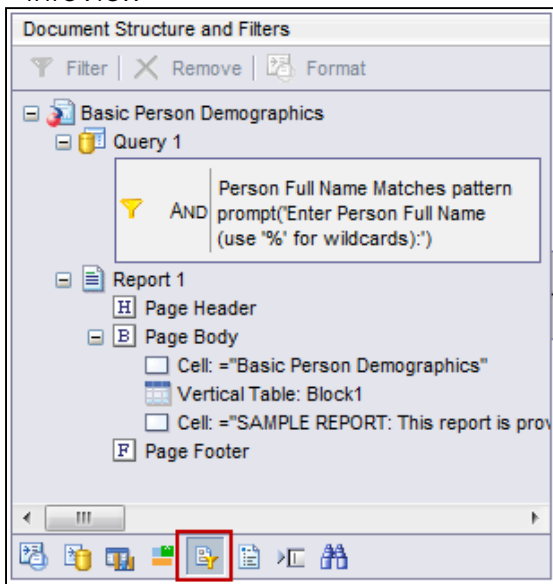
InfoView



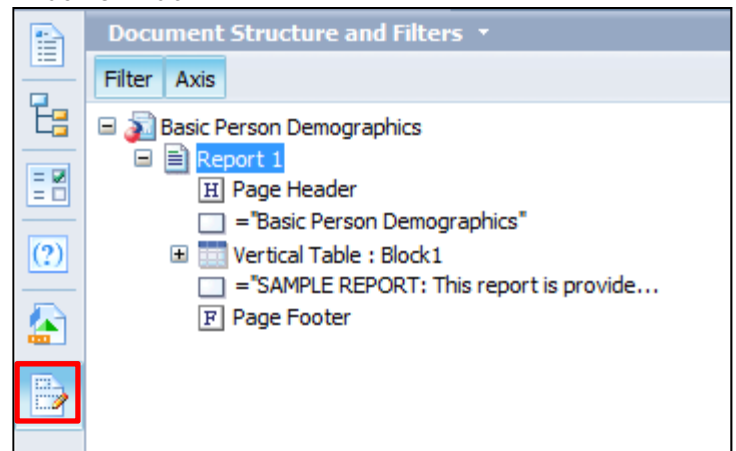
Viewing the Document Structure and Filters

You must be in "Design" mode in order to view Document Structure and Filters in **Launch Pad**. Design mode will be covered later in this document.

InfoView



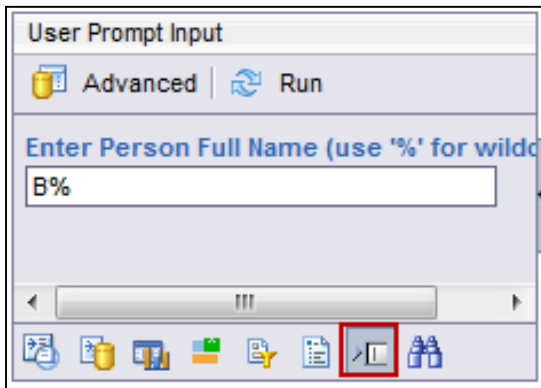
Launch Pad



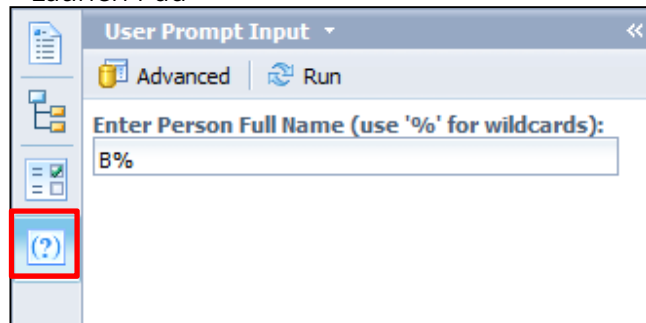
Viewing and Resetting the User Prompts

Switch to User Prompt Input to view the prompts completed when the report first ran and to enter different values to rerun the report.

InfoView



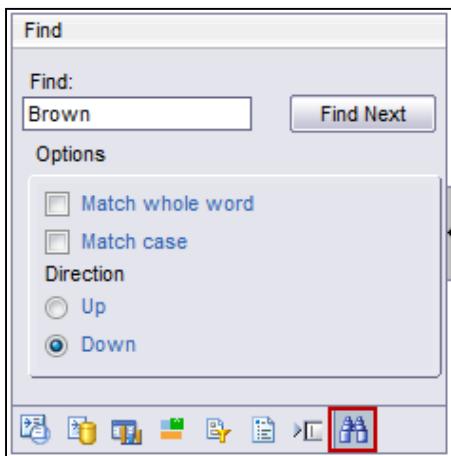
Launch Pad



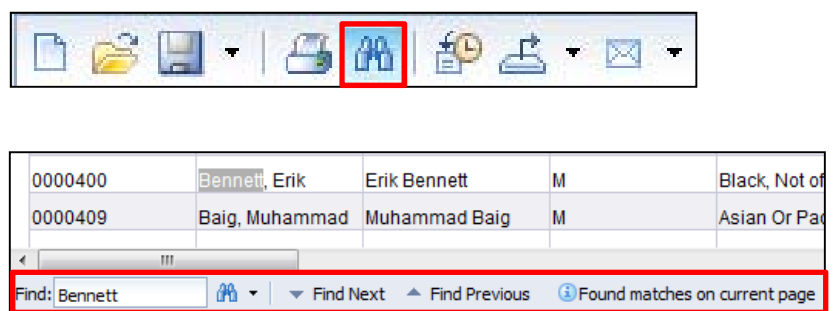
Finding Data

Switch to **Find** to use search functionality to locate specific data in the report results. **InfoView** has the Find option in the left panel. **Launch Pad** puts the Find option in the top toolbar, and the search field appears directly below the report results.

InfoView



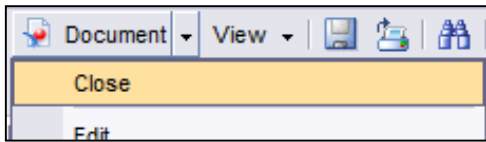
Launch Pad



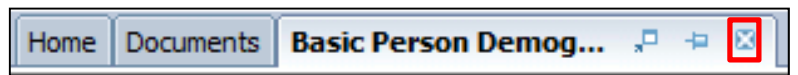
Closing Reports

In **InfoView**, close the report by selecting Document → Close or by clicking the "X" in the upper right corner. In **Launch Pad**, simply click the "X" on the report tab.

InfoView



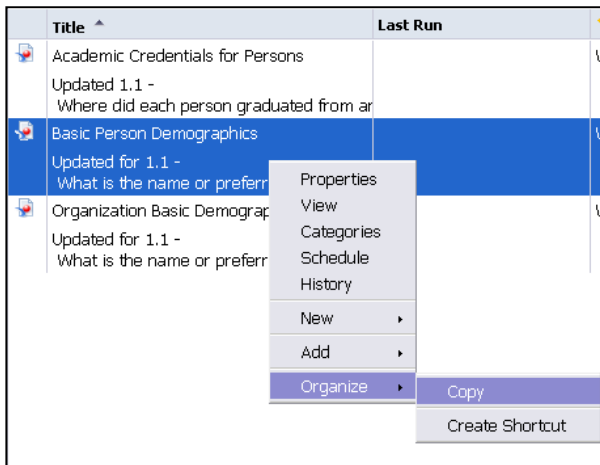
Launch Pad



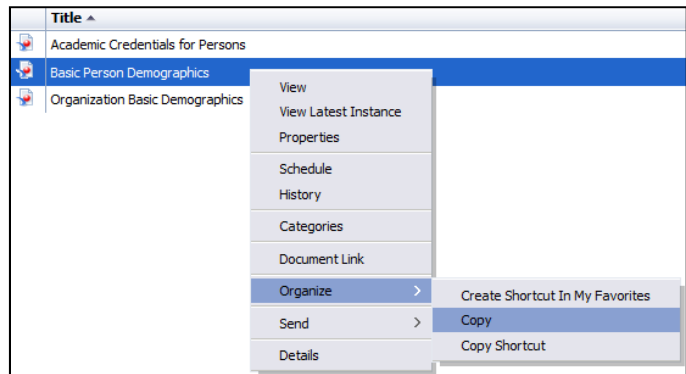
Copying an Existing Report

To modify an existing report, you need to make a copy and place the copy in your "My Favorites" folder. Begin by right clicking on the report and choose Organize → Copy.

InfoView

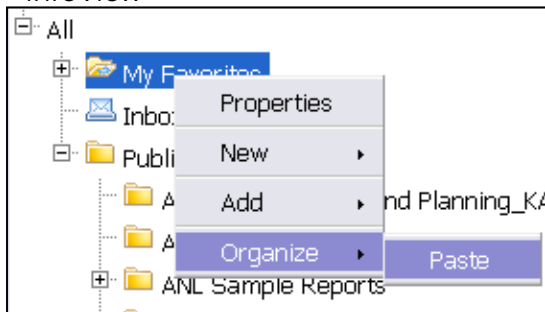


Launch Pad

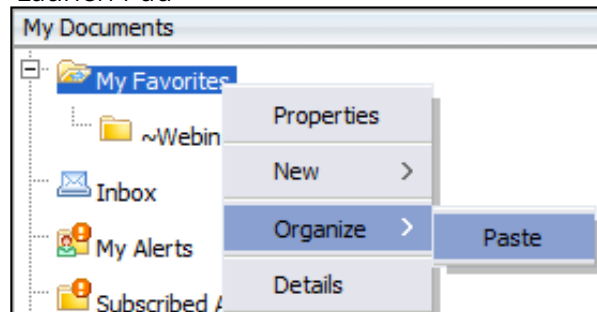


To store the copy, right click on your "My Favorites" folder and choose Organize → Paste.

InfoView



Launch Pad



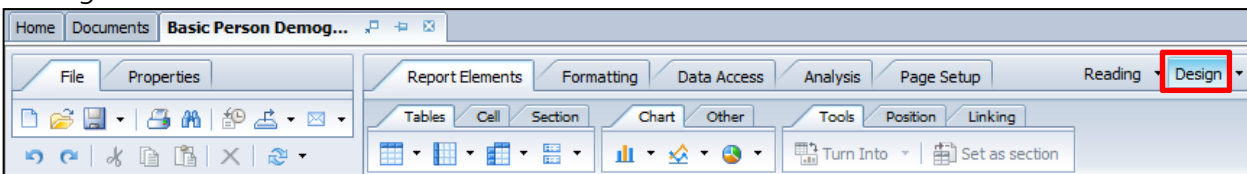
Launch Pad: Reading and Design Modes

Launch Pad has two different modes: **Reading** and **Design**, which you can access in the upper right hand corner of the report screen. Reading mode will allow you to refresh and view the report only. Design mode will allow you to make formatting and other design changes to the report. Note that additional formatting tabs will appear once you switch to Design mode. **InfoView** does not have different modes for reading and design.

Reading Mode



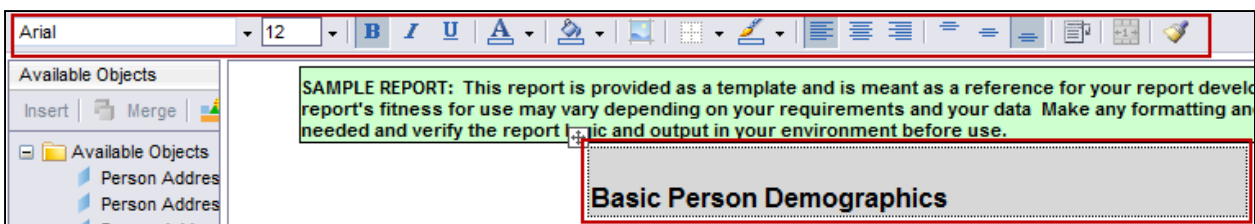
Design Mode



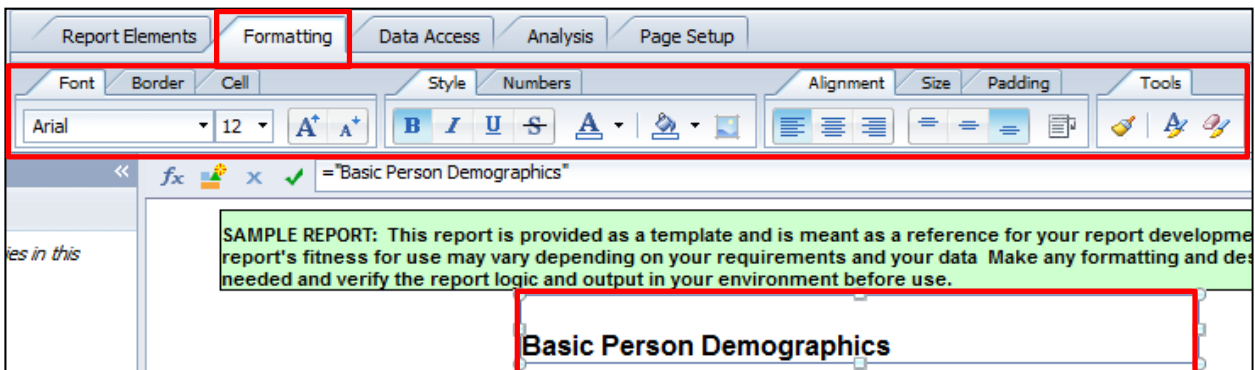
Changing Formatting

- Highlight the object you would like to format.
 - **InfoView**: Use the Formatting toolbar to change as needed.
 - **Launch Pad**: Click on the "Formatting" tab and change as needed.

InfoView



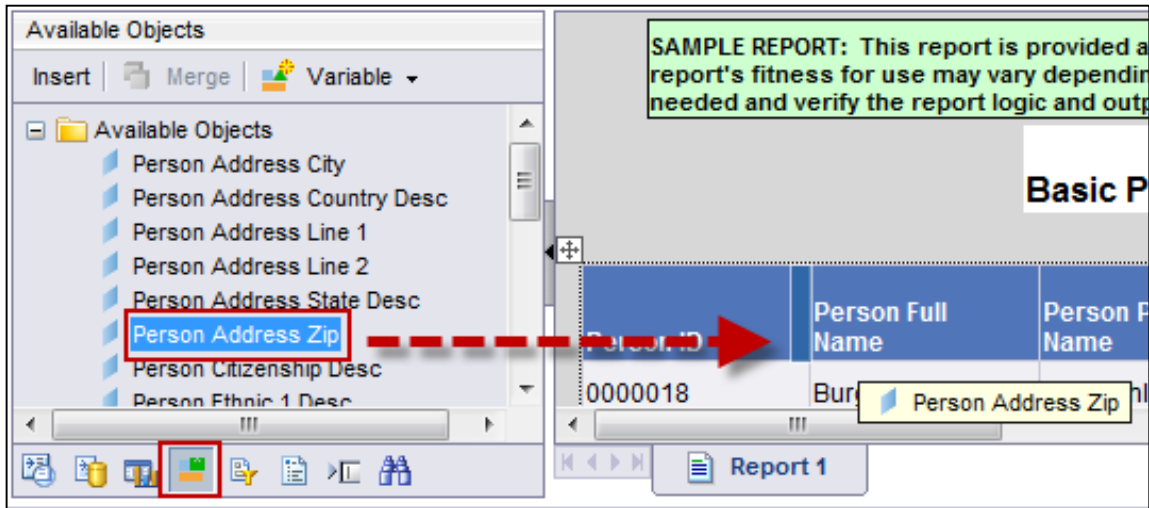
Launch Pad



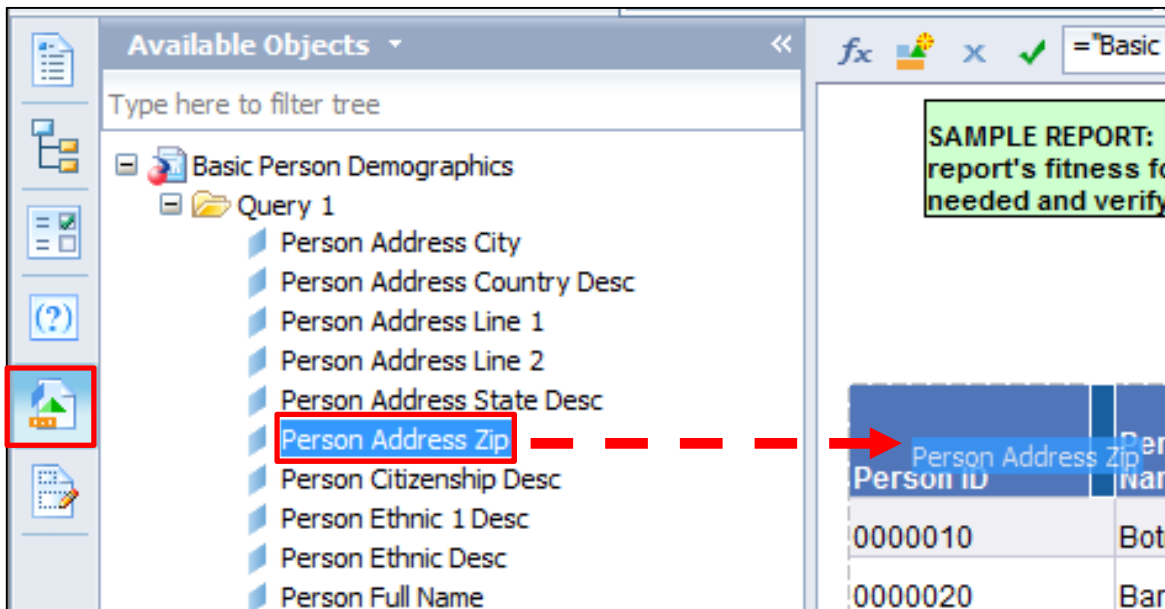
Adding Objects

- Display the Available Objects.
 - Click and drag the appropriate object into the report.

InfoView

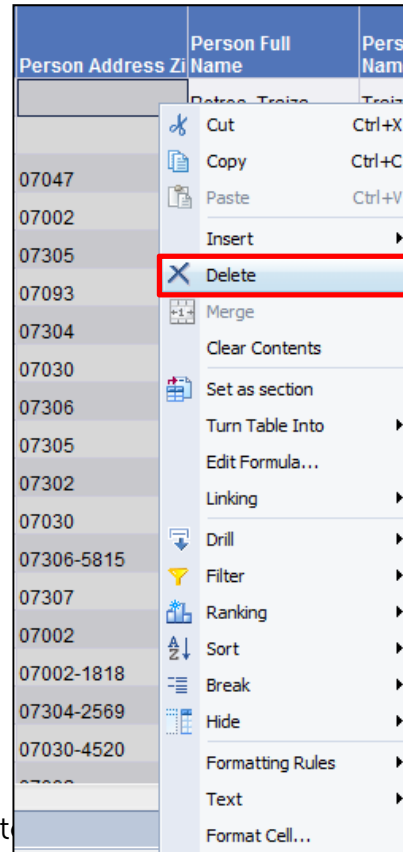
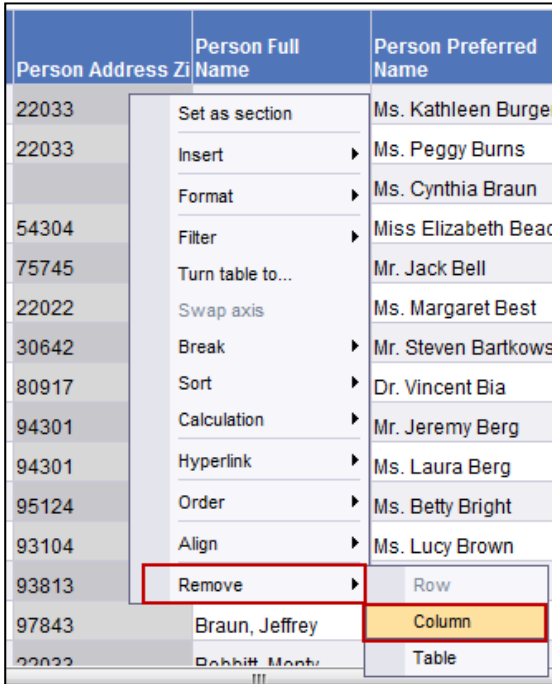


Launch Pad



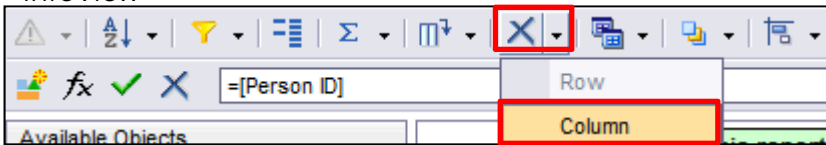
Removing Objects

- Right-click the column.
 - InfoView:** Select Remove → Column
 - Launch Pad:** Select Delete

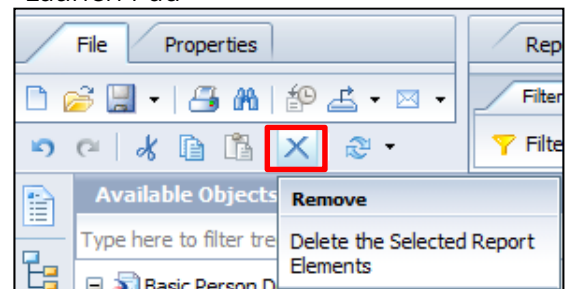


- Alternately, highlight the column you wish to remove. The data under the column header is highlighted.
 - InfoView:** From the Report Toolbar, click the "X" button and then select "Column"
 - Launch Pad:** Click the "X" button under the "File" tab.

InfoView



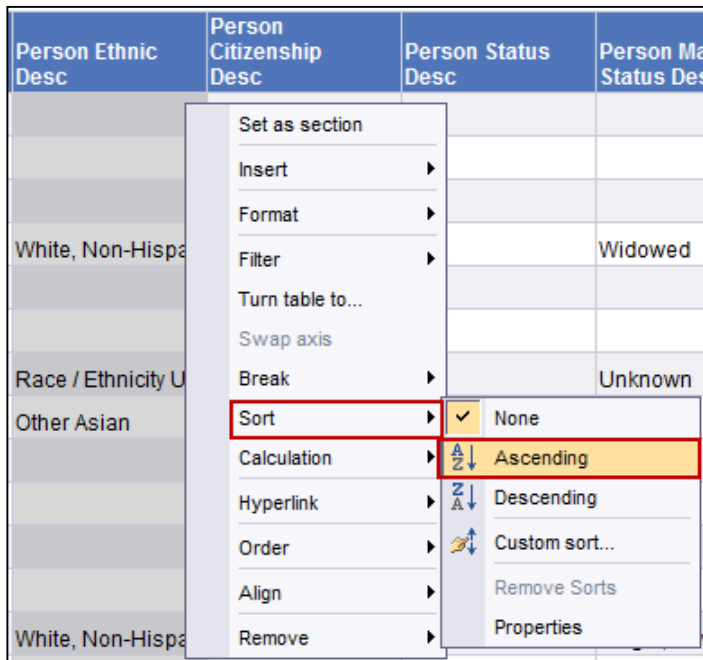
Launch Pad



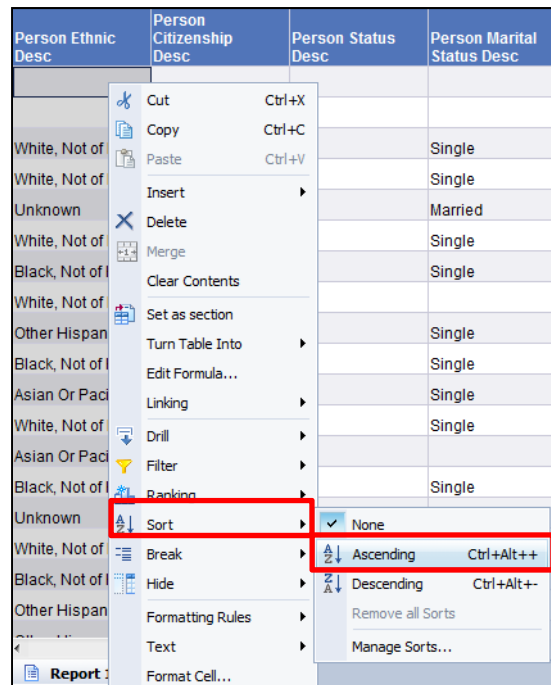
Sorting Data

- Right-click the column you wish to sort.
- Select Sort → appropriate sort order.

InfoView

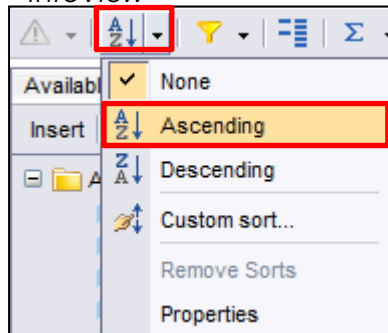


Launch Pad

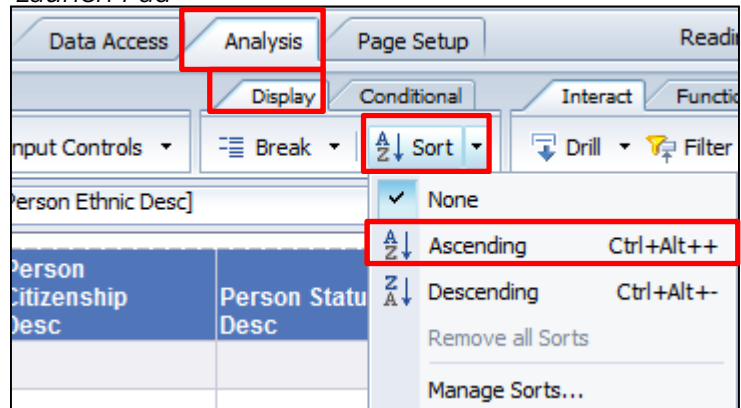


- Alternately, select the column you want to sort by clicking on the data under the column header.
 - **InfoView**: From the Report Toolbar, click the Sort button and choose the appropriate sort order.
 - **Launch Pad**: From the Analysis Tab and the Display sub-tab, click Sort and choose the appropriate sort order.

InfoView



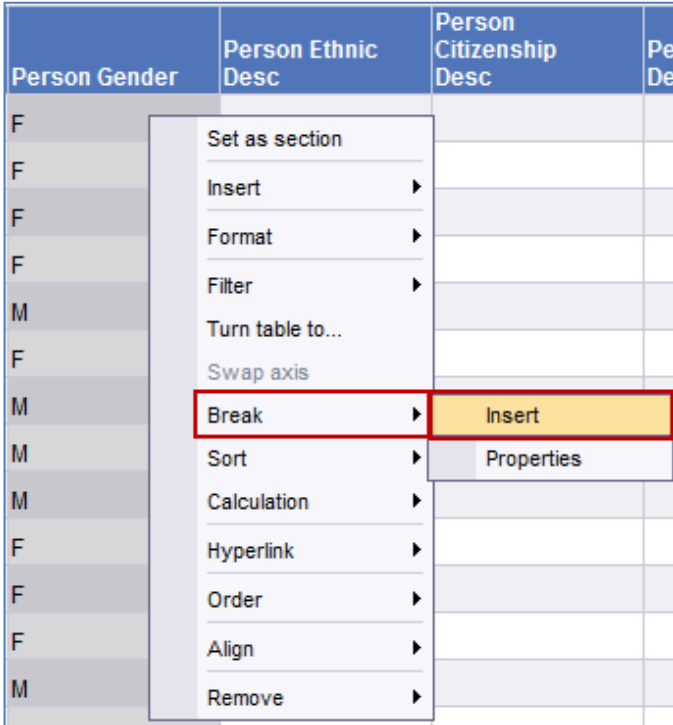
Launch Pad



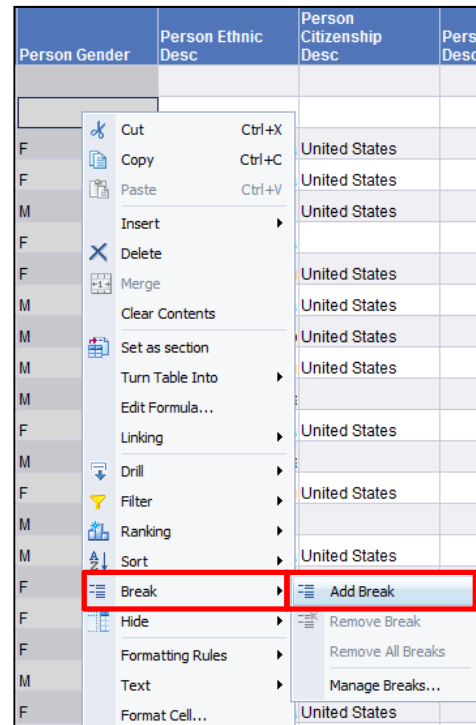
Breaking Data

- Right-click the column on which you wish break the data.
 - InfoView:** Select Break → Insert
 - Launch Pad:** Select Break → Add Break

InfoView



Launch Pad

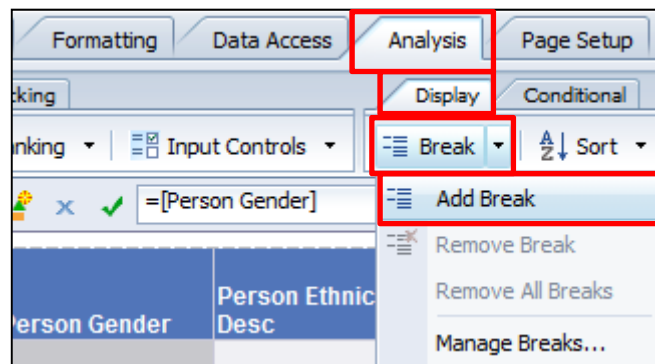


- Alternately, select the column you want to break by clicking on the data under the column header.
 - InfoView:** From the Report Toolbar, click the Insert Break button.
 - Launch Pad:** From the Analysis Tab and the Display sub-tab, click Break and choose Add Break.

InfoView



Launch Pad



Applying Quick Filters: InfoView

- Right-click the column on which you wish filter.
- Select Filter → Add Filter.
- Complete the dialog box.

Person Marital Status Desc	Person Phone Number	Person Phone Extension	Person Ph Type Desc
Widowed			
Unknown			
Single, Never Mar			Home / Pe

Filter dialog box showing the configuration for filtering 'Person Marital Status Desc' with the value 'Single, Never Married'.

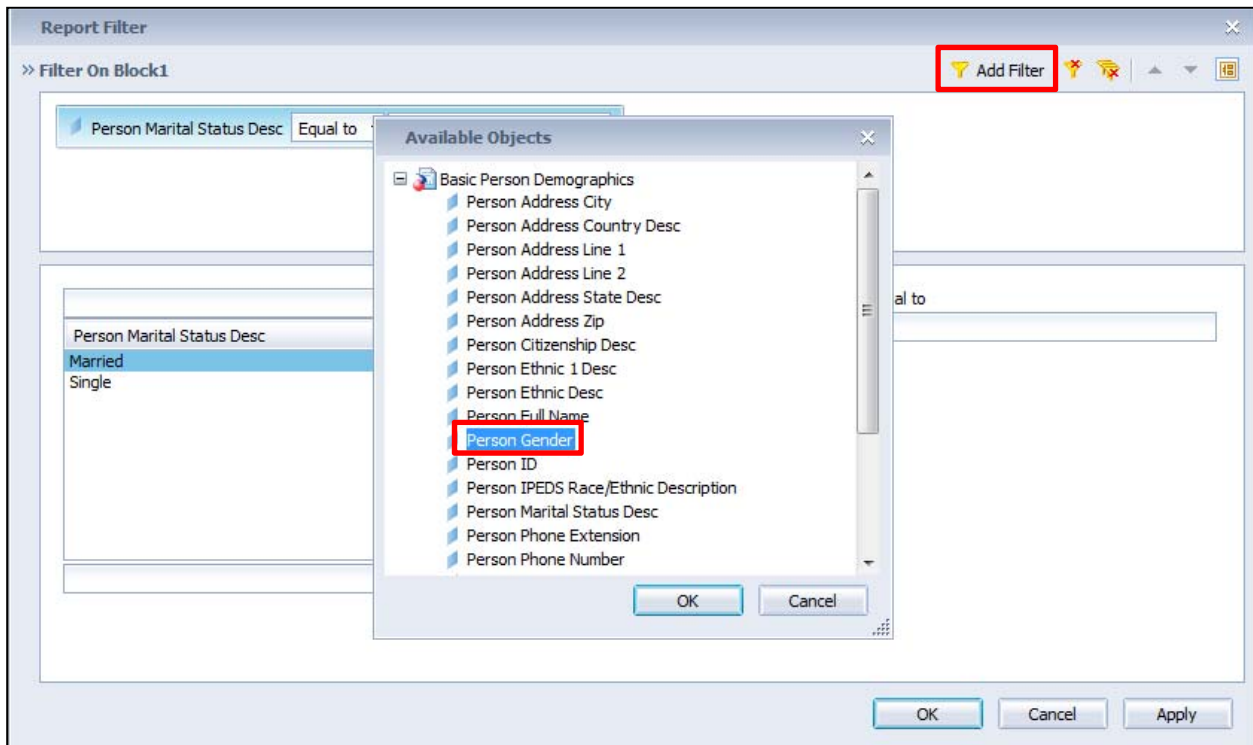
Applying Quick Filters: Launch Pad

- Right-click the column on which you wish filter.
- Select Filter → Add Filter.
- Complete the dialog box.

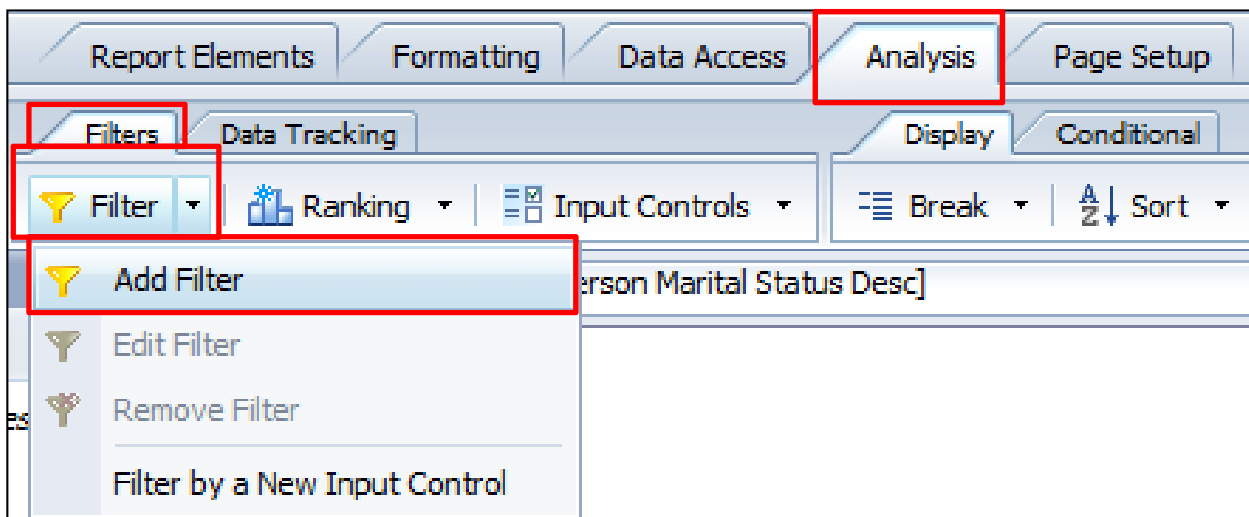
Person Marital Status Desc	Person Phone Number	Person Phone Extension	Person Phone Type Desc
Single			
Single			
Married			
Single			
Single			
Single			
Single			
Single			
Single			
Single			
Married			
Married			

Report Filter dialog box showing the configuration for filtering 'Person Marital Status Desc' with the value 'Married'.

- Within the dialog box, you can even add or remove additional filters.



- Alternately, select the column you want to break by clicking on the data under the column header.
 - From the Analysis Tab and the Filters sub-tab, click Filter and choose Add Filter and complete the dialog box that appears.



Adding Aggregations

- Right-click the column on which you wish to add an aggregation.
 - InfoView:** Select Calculation → appropriate aggregation.
 - Launch Pad:** Select Insert → appropriate aggregation.

InfoView

Person ID	Person Address Zip	Person Full Name	Person Gender
0000018		Burger, Kathleen	Ms.
0000022		Burns, Peggy	Ms.
0000038		Braun, Cynthia	Ms.
0000046		Beachtel, Elizabeth	Miss
0000191		Bell, Jack	Mr.
0000194		Best, Margaret	Ms.
0000212		Bartkowski, Steven	Mr.
0000223		Bia, Vincent	Dr.
0000240			
0000241			
0000242			
0000243			
0000244			
0000347	97843		
0000370	97833		

Launch Pad

Person ID	Person Full Name	Person Preferred Name	Person Gender
0000010		Botros	
0000020		Barrett-McBurr	
0000296		entley	F
0000314			
0000332			
0000339			
0000358			
0000380			
0000387			
0000400			
0000409		imad Baig	M
0000417		ruzzese	F
0000433		ros Boulis	M
0000438		Baah	F
0000440		atarseh	M
0000441		atarseh	M
0000454		eaupin	F
0000504		a Brett	F
0000525		eiro-Louro	F
0000545		I Barthel	M

- Alternately, select the column you want to aggregate by clicking on the data under the column header.
 - InfoView:** From the Report Toolbar, click the Calculations button and select the appropriate aggregation.
 - Launch Pad:** From the Analysis Tab and the Functions sub-tab, click the button for the appropriate aggregation.

InfoView

Person ID	Person Address Zip	Person Full Name	Person Gender
0000018		Burger, Kathleen	Ms.
0000022		Burns, Peggy	Ms.
0000038		Braun, Cynthia	Ms.
0000046		Beachtel, Elizabeth	Miss
0000191		Bell, Jack	Mr.
0000194		Best, Margaret	Ms.
0000212		Bartkowski, Steven	Mr.
0000223		Bia, Vincent	Dr.
0000240			
0000241			
0000242			
0000243			
0000244			
0000347	97843		
0000370	97833		

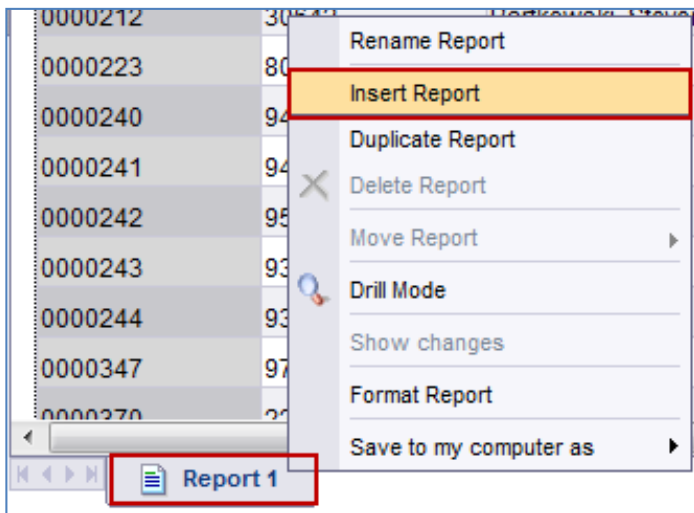
Launch Pad

Person ID	Person Full Name	Person Preferred Name	Person Gender
0000010		Botros	
0000020		Barrett-McBurr	
0000296		entley	F
0000314			
0000332			
0000339			
0000358			
0000380			
0000387			
0000400			
0000409		imad Baig	M
0000417		ruzzese	F
0000433		ros Boulis	M
0000438		Baah	F
0000440		atarseh	M
0000441		atarseh	M
0000454		eaupin	F
0000504		a Brett	F
0000525		eiro-Louro	F
0000545		I Barthel	M

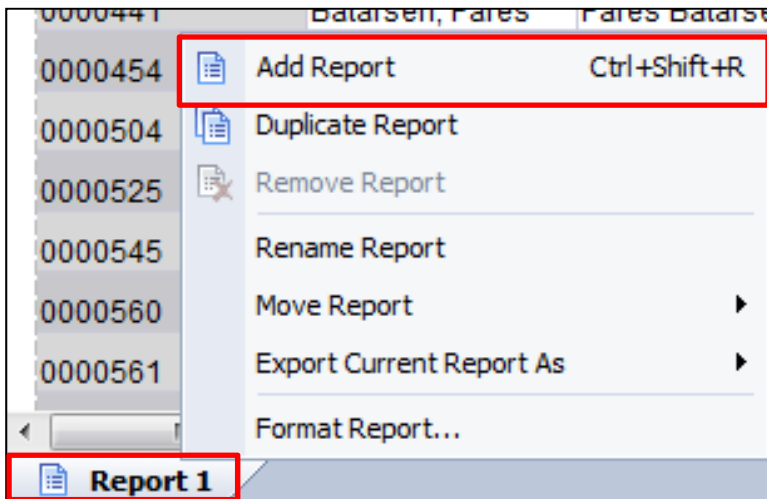
Inserting New or Duplicate Reports

- Right-click one of the report tabs.
 - **InfoView**: Select Insert Report (for a blank report) or Duplicate Report (for an exact copy).
 - **Launch Pad**: Select Add Report (for a blank report) or Duplicate Report (for an exact copy).

InfoView

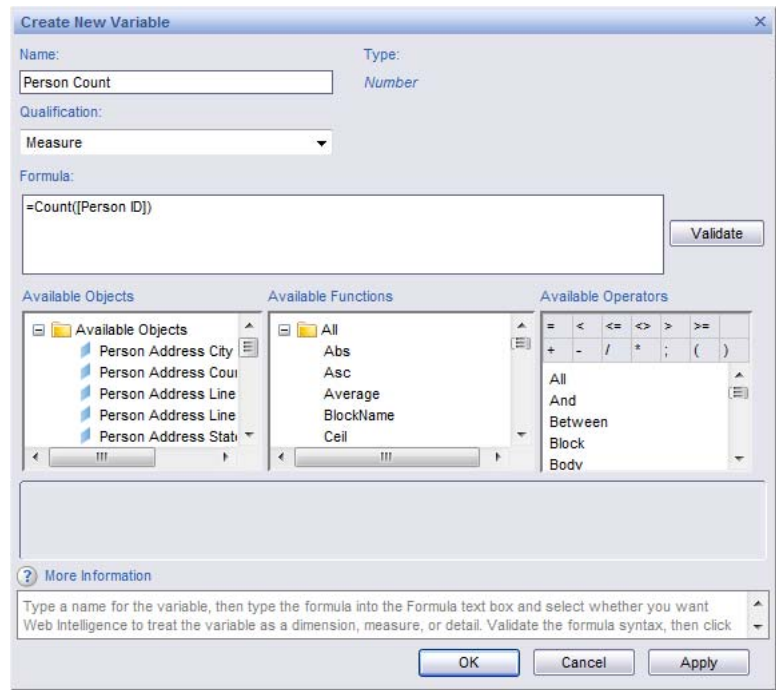
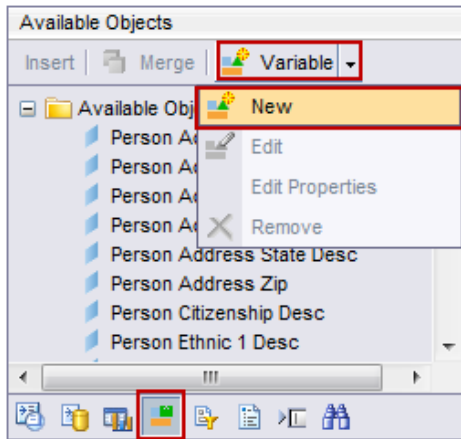


Launch Pad



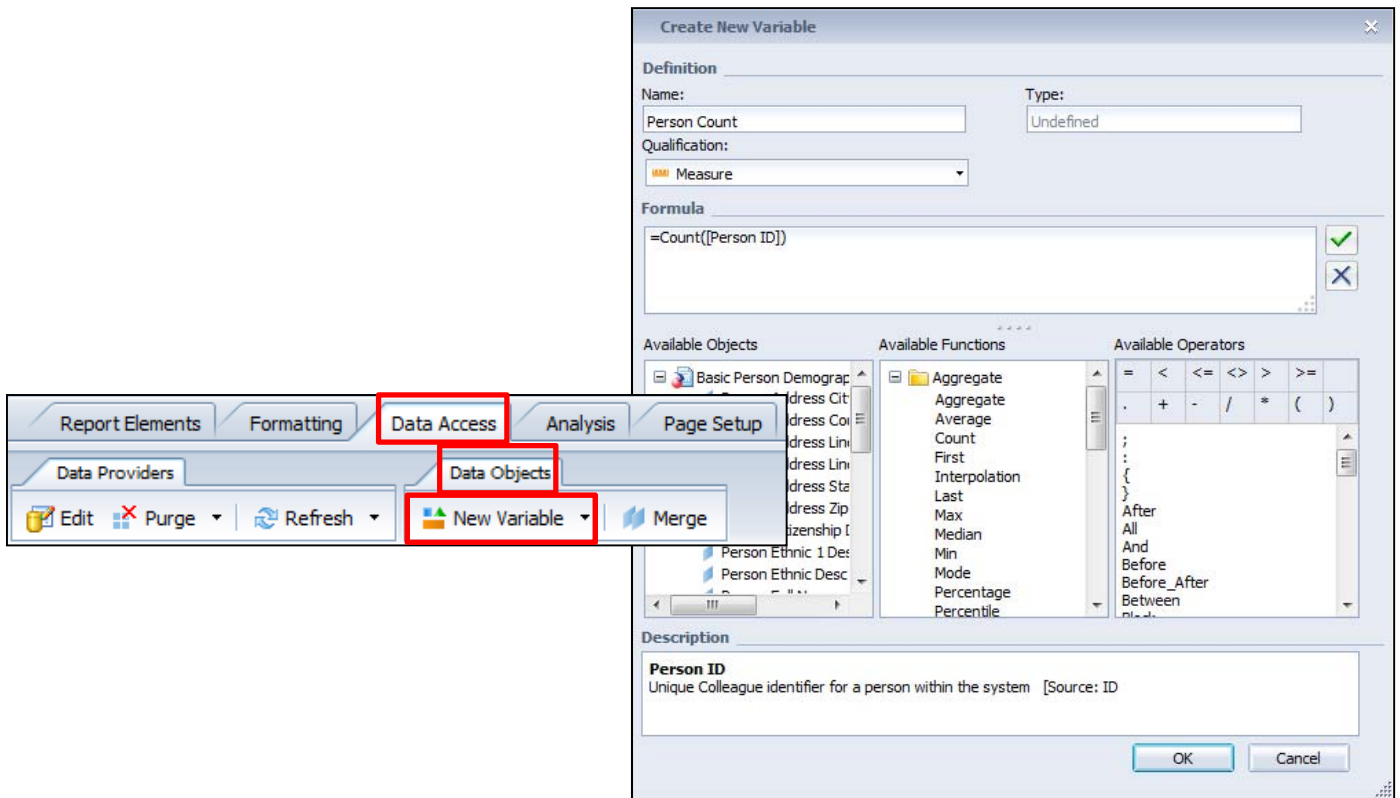
Creating Variables: InfoView

- Switch to Available Objects.
- Select Variable → New.
- Complete the dialog box.



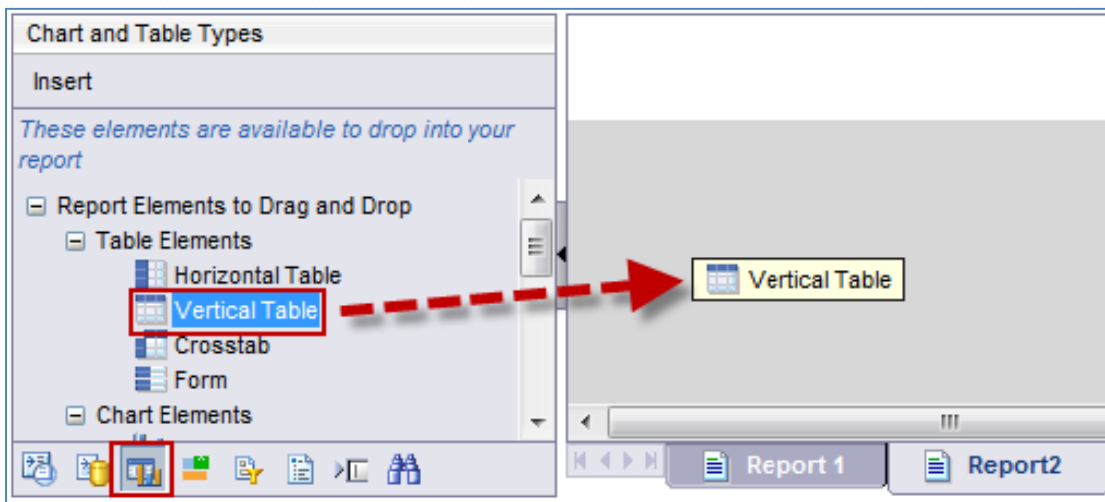
Creating Variables: Launch Pad

- From the Data Access Tab and the Data Objects sub-tab, click New Variable.
- Complete the dialog box.



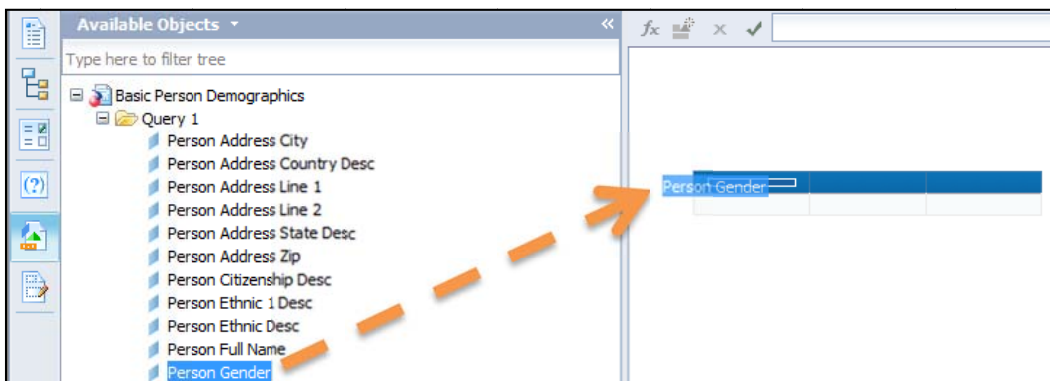
Inserting New Tables: InfoView

- Switch to Chart and Table Types.
- Click and drag the appropriate type of table into the report.
- Add elements to the report as needed from the Available Objects.



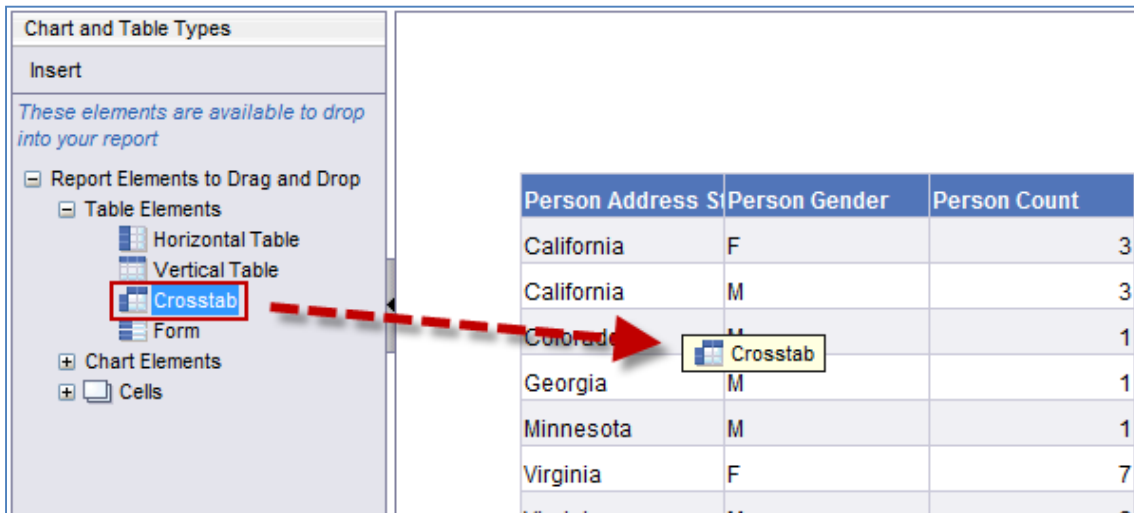
Inserting New Tables: Launch Pad

- Select the Report Elements tab, then the Table sub-tab.
- Click on the type of table you would like to insert.
- Click in the space where you would like your table to appear. A blank table will be added to the report.
- Drag-and-drop fields from the Available objects into the table.



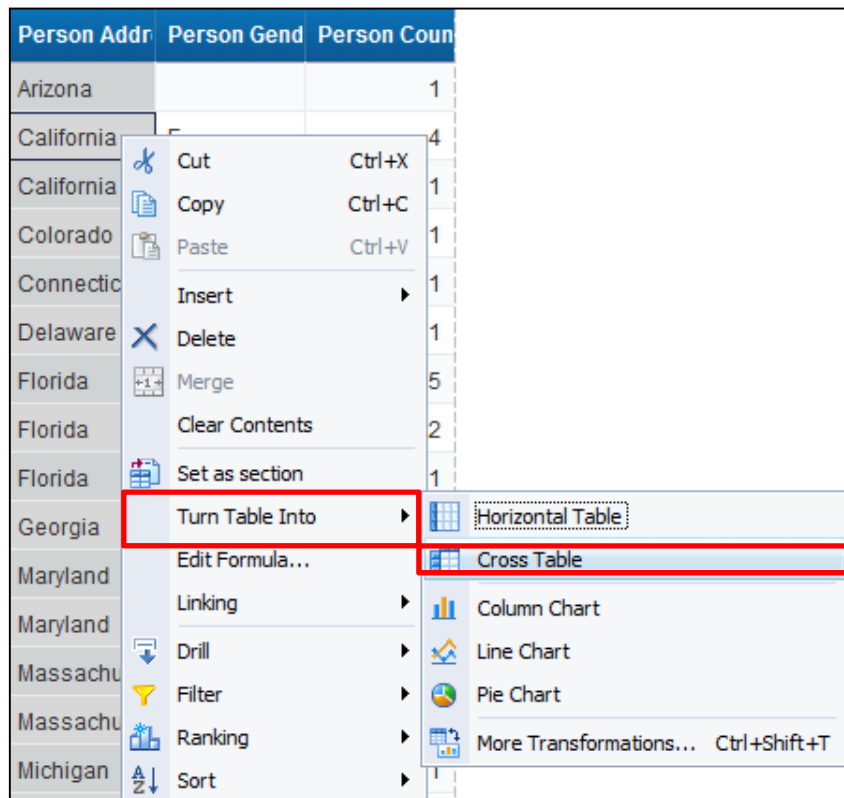
Converting to a Different Table Type: InfoView

- Click and drag the appropriate type of table.
- Drop it over the existing table.



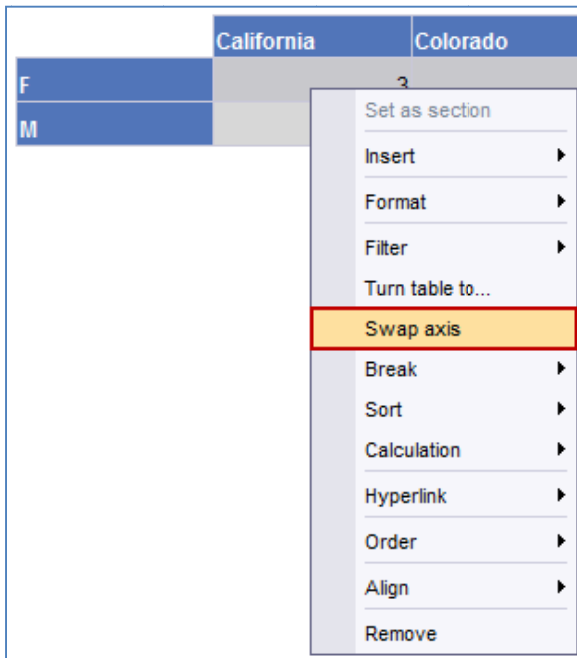
Converting to a Different Table Type: Launch Pad

- Right-click within the table.
- Select Turn Table Into → select desired type of table.



Swap Axis: InfoView

- Right-click anywhere in the table.
- Select Swap axis.



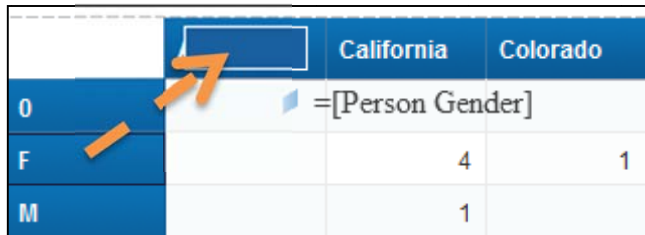
The screenshot shows a table with columns 'California' and 'Colorado' and rows 'F' and 'M'. A context menu is open over the table, listing various actions. The 'Swap axis' option is highlighted with a red border.

	California	Colorado
F		
M		

- Set as section
- Insert ▶
- Format ▶
- Filter ▶
- Turn table to...
- Swap axis**
- Break ▶
- Sort ▶
- Calculation ▶
- Hyperlink ▶
- Order ▶
- Align ▶
- Remove

Swap Axis: Launch Pad

- Drag one of the row values on top of one of the column values (or vice versa).



The screenshot shows a table with columns 'California' and 'Colorado' and rows '0', 'F', and 'M'. A formula bar above the table contains the formula `= [Person Gender]`. A blue box highlights the 'F' row header, and an orange arrow points from it towards the 'California' column header.

	California	Colorado
0		
F	4	1
M	1	

`= [Person Gender]`

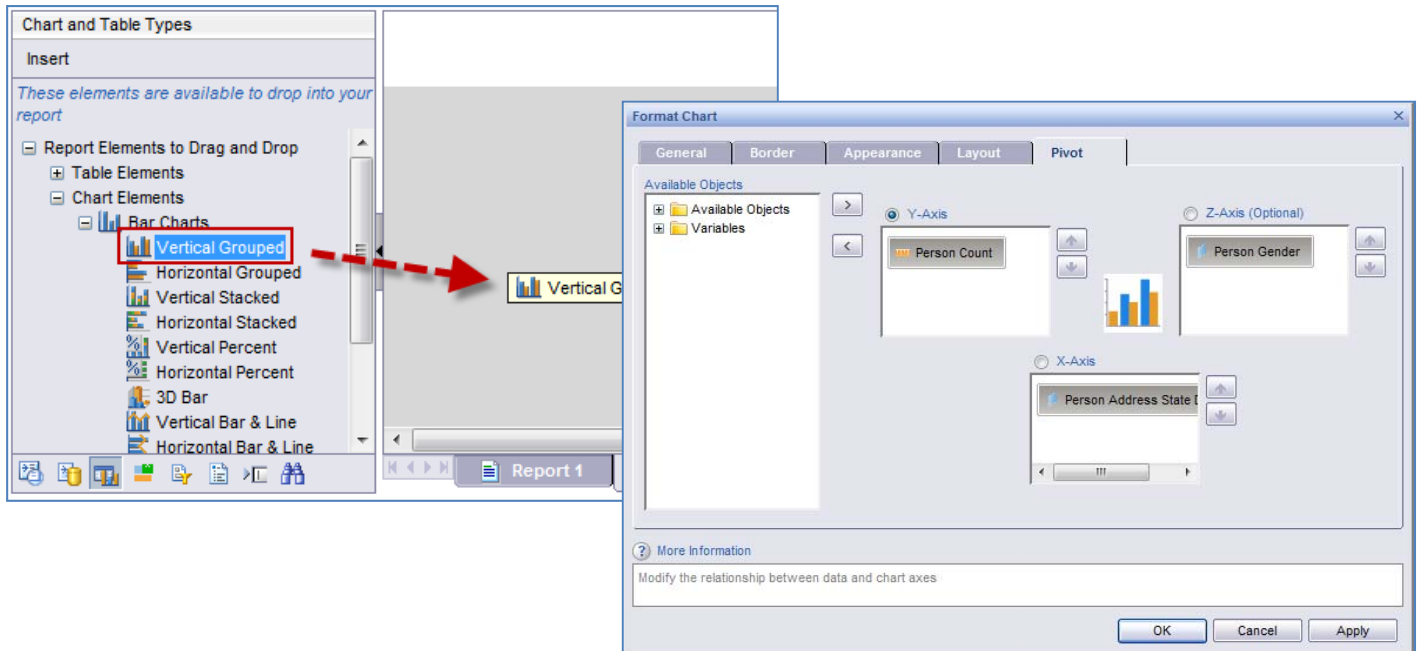


The screenshot shows a table with columns '0', 'F', and 'M' and rows 'Arizona', 'California', and 'Colorado'. The data is as follows:

	0	F	M
Arizona			
California		4	1
Colorado		1	

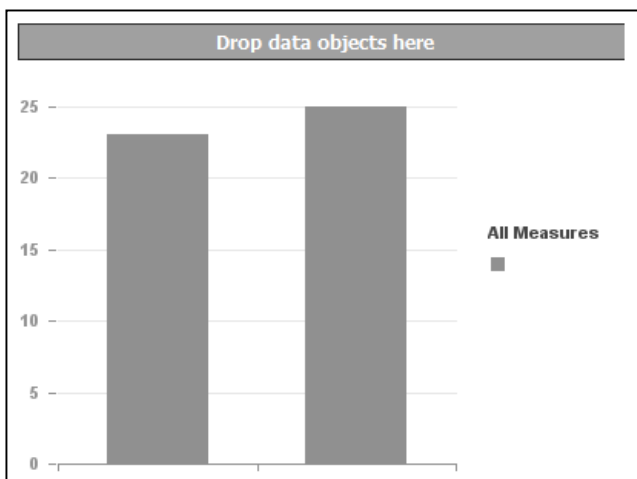
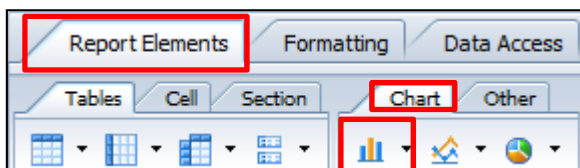
Inserting New Charts: InfoView

- Switch to Chart and Table Types.
- Click and drag the appropriate type of table into the report.
- Complete the dialog box (may vary by chart type).

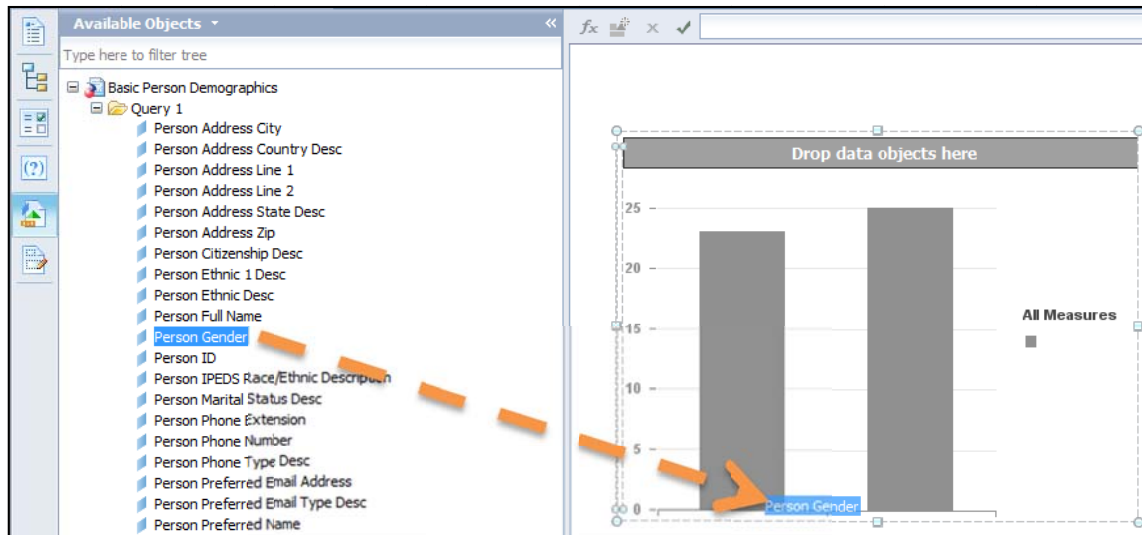


Inserting New Charts: Launch Pad

- Select the Report Elements tab, then the Chart sub-tab.
- Click on the type of chart you would like to insert.
- Click in the space where you would like your chart to appear. A blank chart will be added to the report.

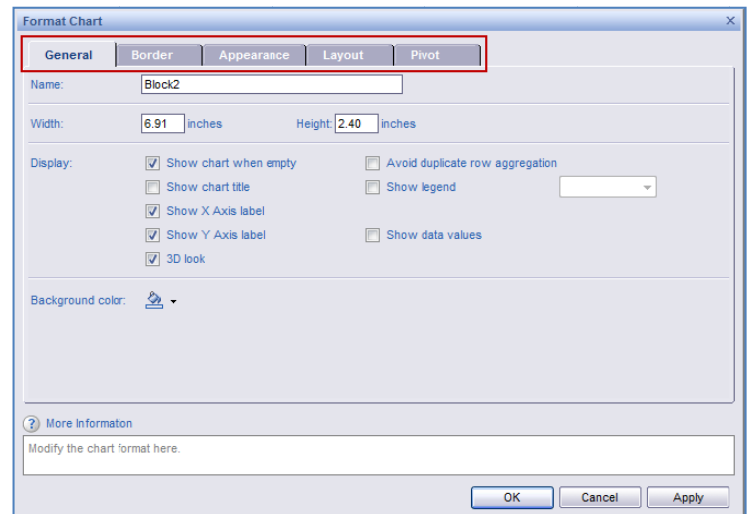
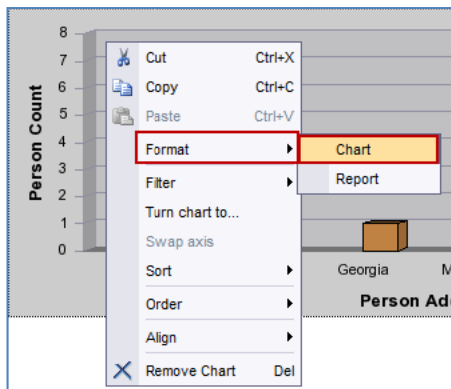


- Drag objects to the X-axis and Y-axis from the Available Objects.



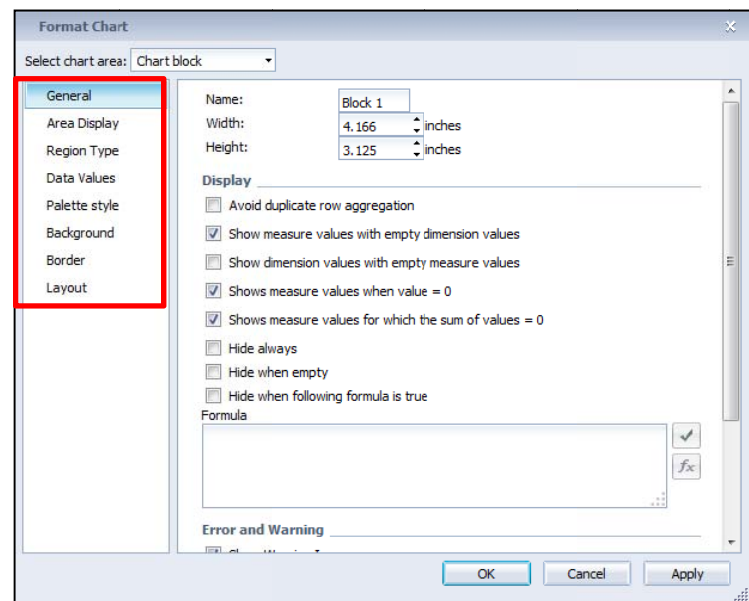
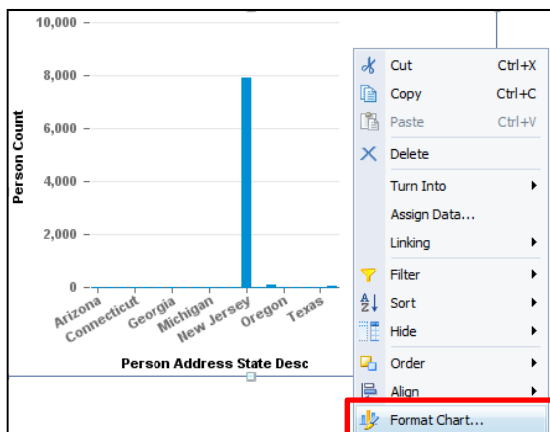
Formatting Charts: InfoView

- Right-click the chart you wish to format.
- Select Format → Chart.
- Complete the dialog box as needed.



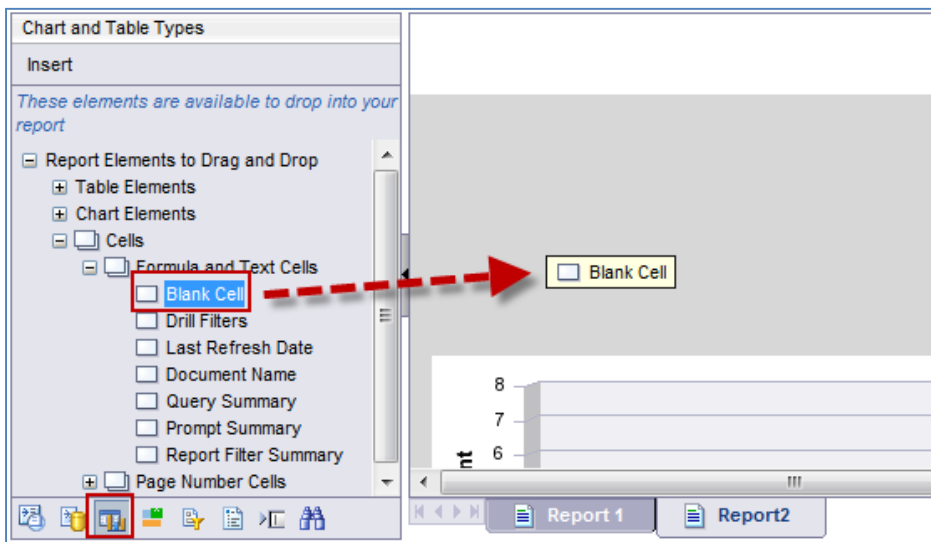
Formatting Charts: Launch Pad

- Right-click the chart.
- Select Format Chart.
- Complete the dialog box as needed.



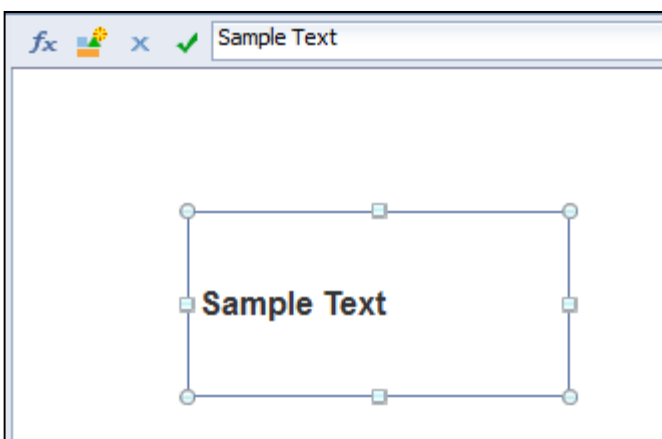
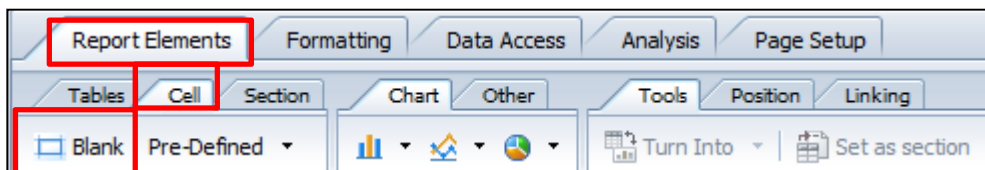
Adding Cells: InfoView

- Switch to Chart and Table Types.
- Click and drag the appropriate cell into the report.
- For a blank cell, double-click the cell to enter text.



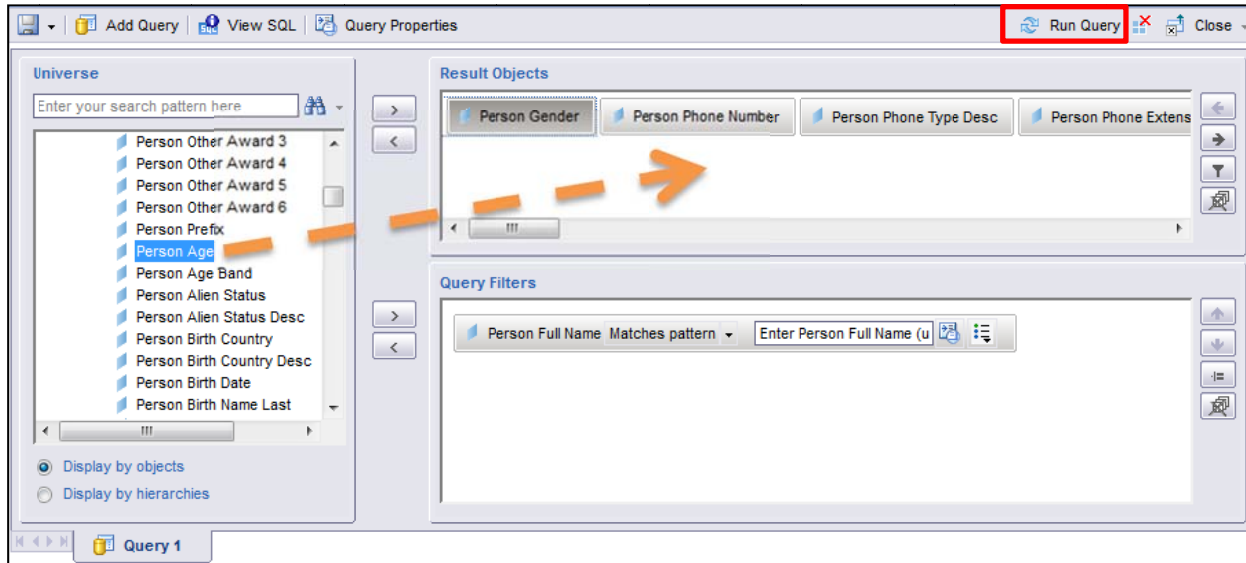
Adding Cells: Launch Pad

- Select the Report Elements tab, then the Cell sub-tab.
- To insert a blank cell, click Blank and click in an open area of the report to insert the cell.
- Double-click the cell to enter text.



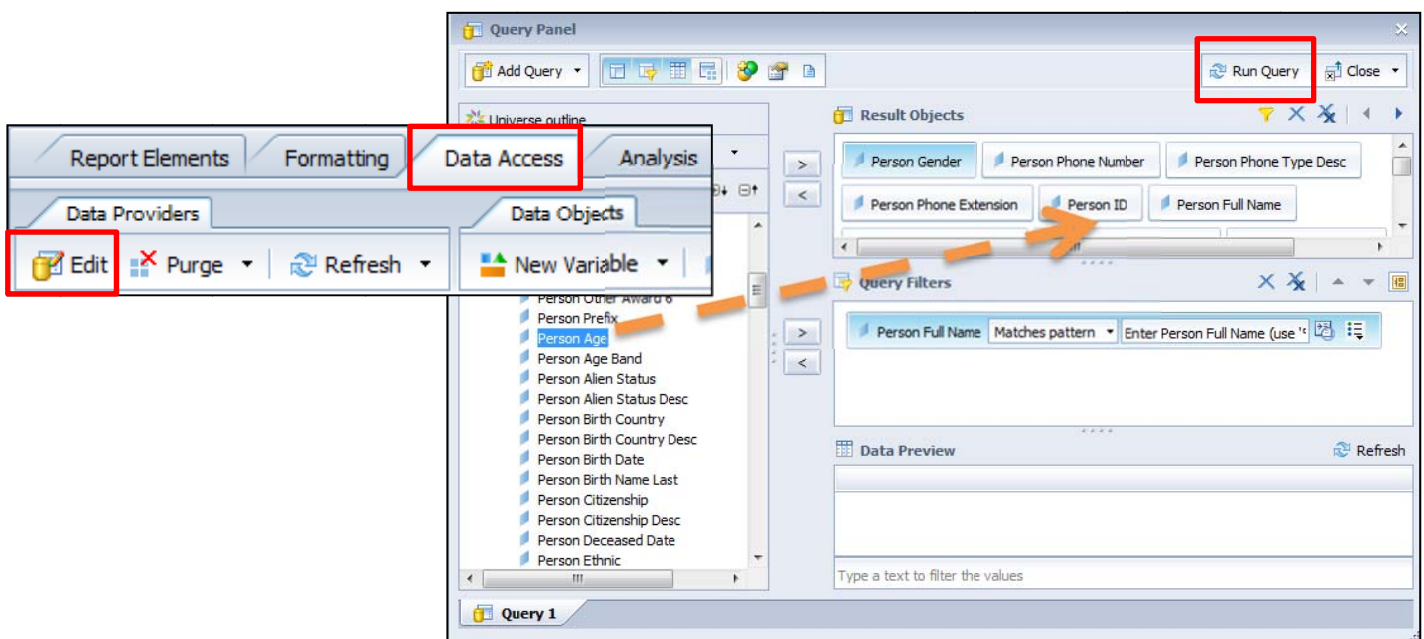
Editing Queries: InfoView

- Select **Edit Query**
- Make necessary edits to the query (add objects from universes, add filters, etc.)
- Run queries to update report results.

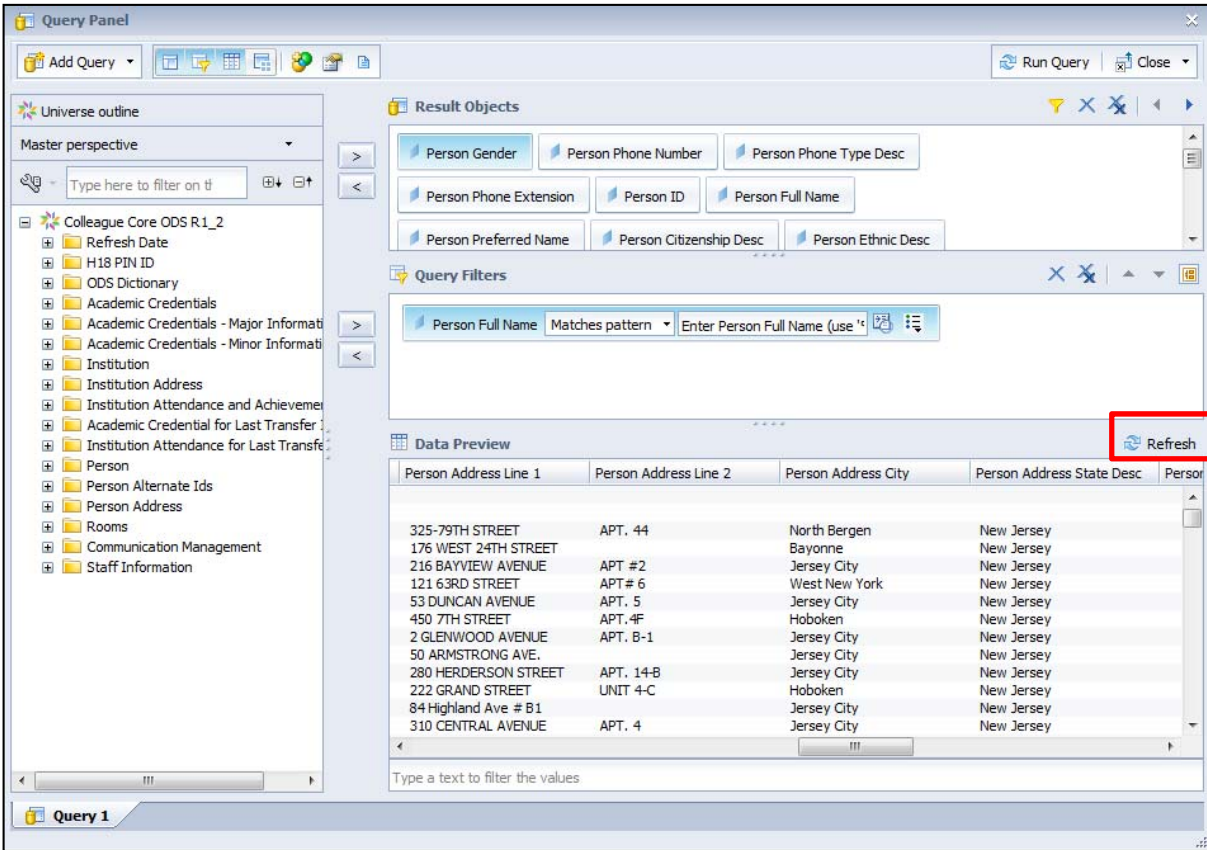


Editing Queries: Launch Pad

- Select the Data Access tab, then the Edit button under the Data Providers sub-tab.
- Make necessary edits to the query (add objects from universes, add filters, etc.)
- Run queries to update report results.



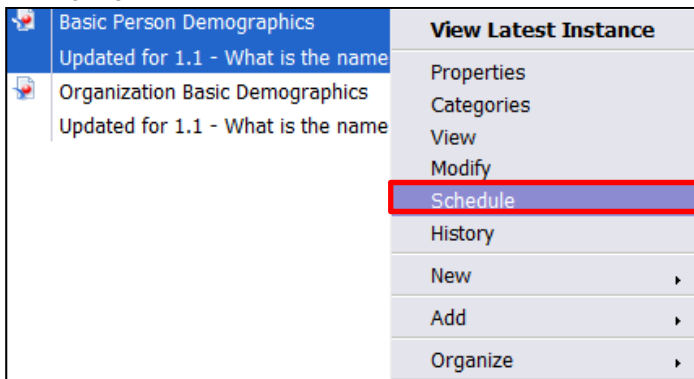
- **Launch Pad** allows you to preview your report data when editing queries. Click on the “Refresh” button on the Data Preview section to see the information that will be displayed on your report.



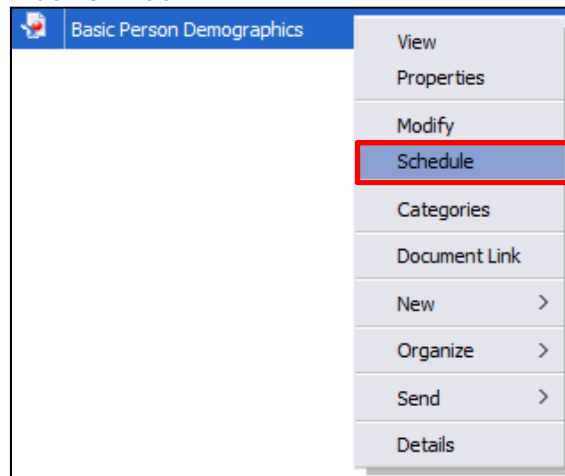
Scheduling Reports

- Scheduling functionality remains similar between InfoView and Launch Pad. To begin, right-click a report and select “Schedule”

InfoView

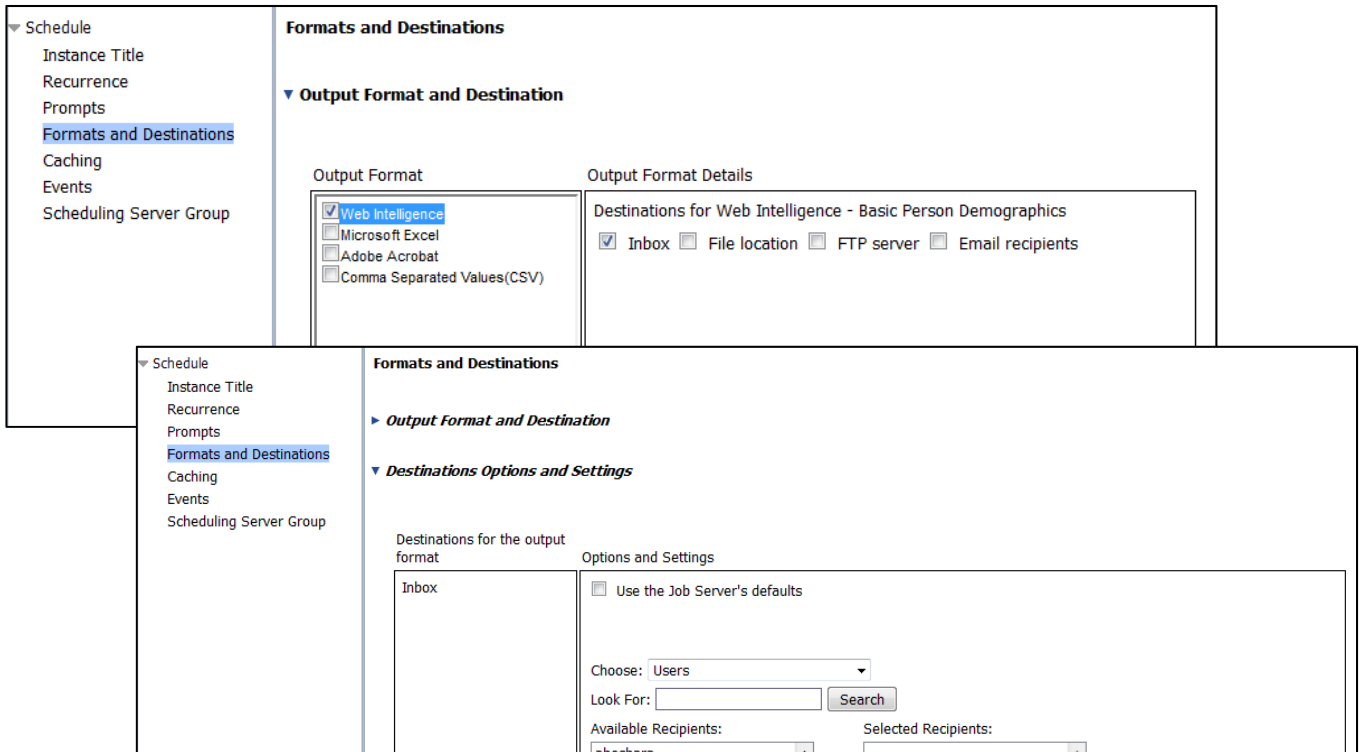


Launch Pad

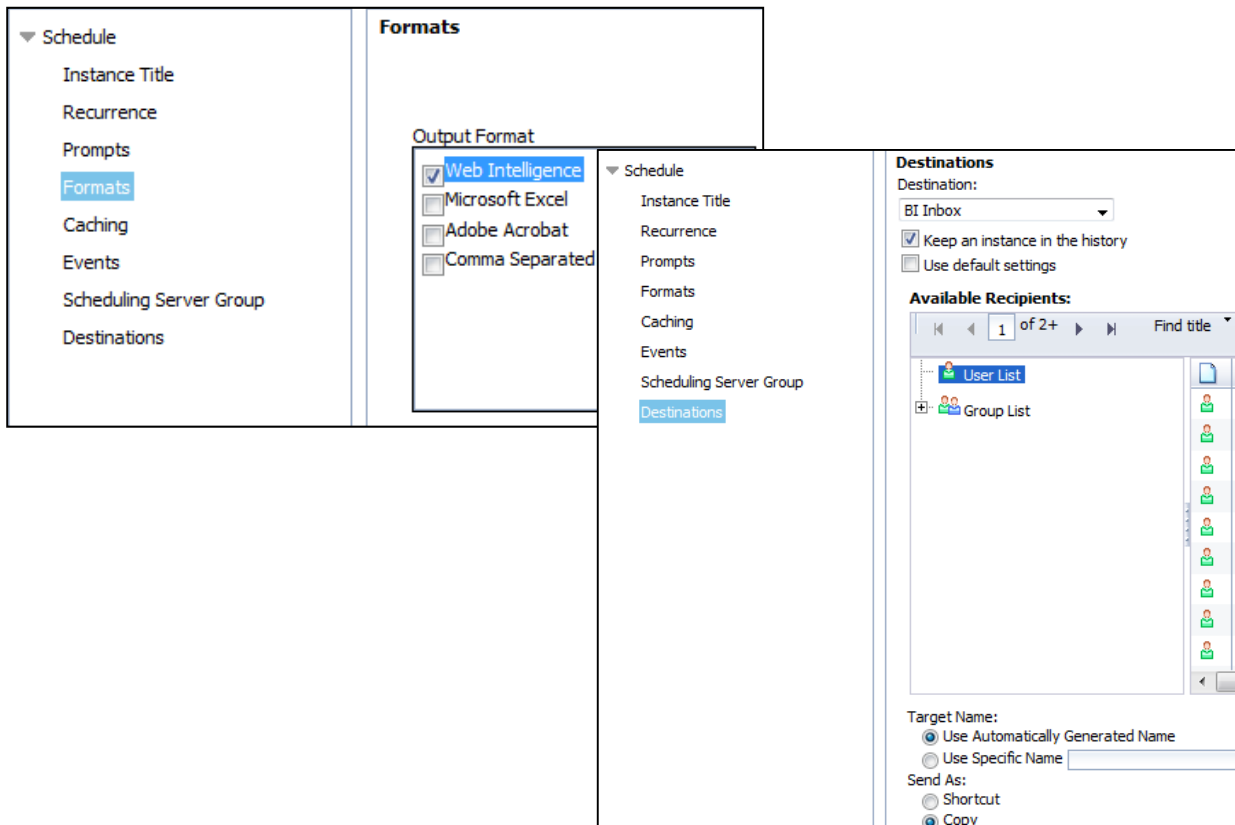


- The "Formats and Destinations" option in **InfoView** is now separated into two separate options in **Launch Pad**, but the functionality remains the same.

InfoView

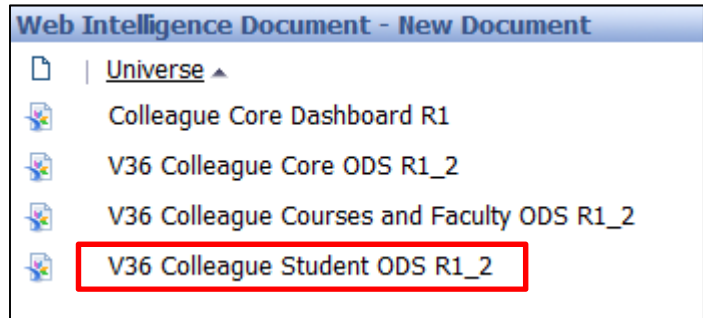
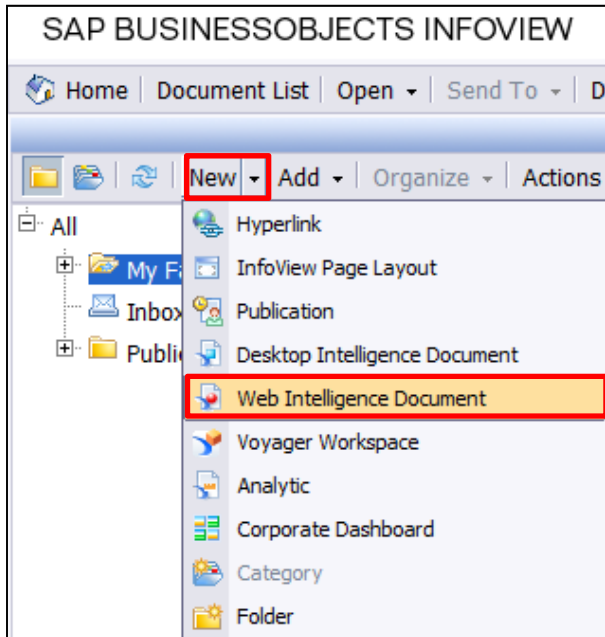


Launch Pad

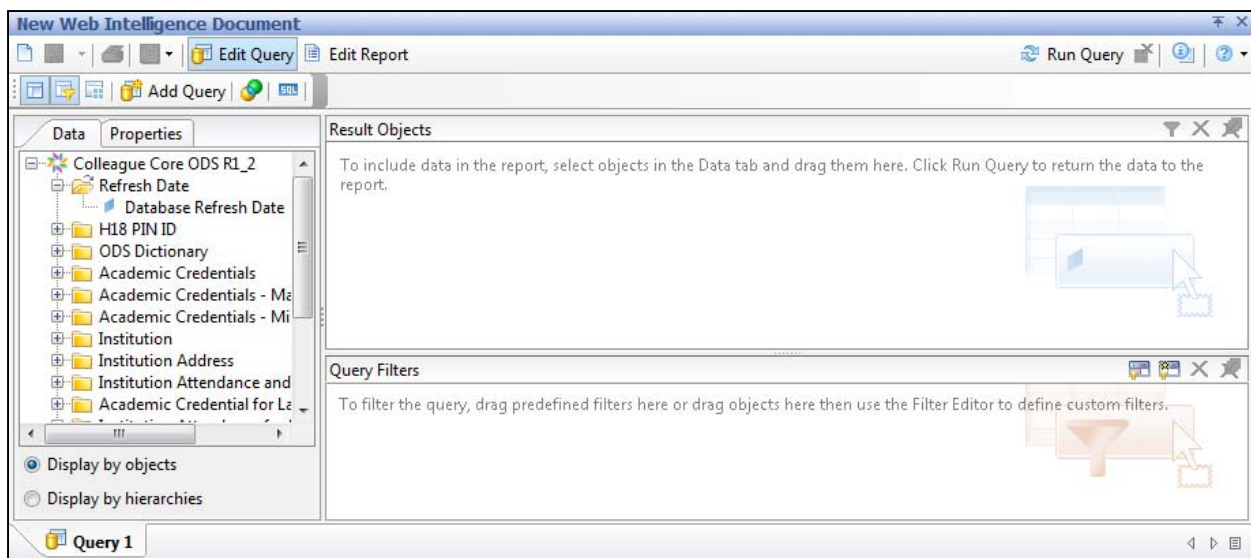


Creating New Reports: InfoView

- To create a new WebI document in InfoView, select "New" from the Menu and then select "Web Intelligence Document."
- Then select the Universe from which you would like to build your report.

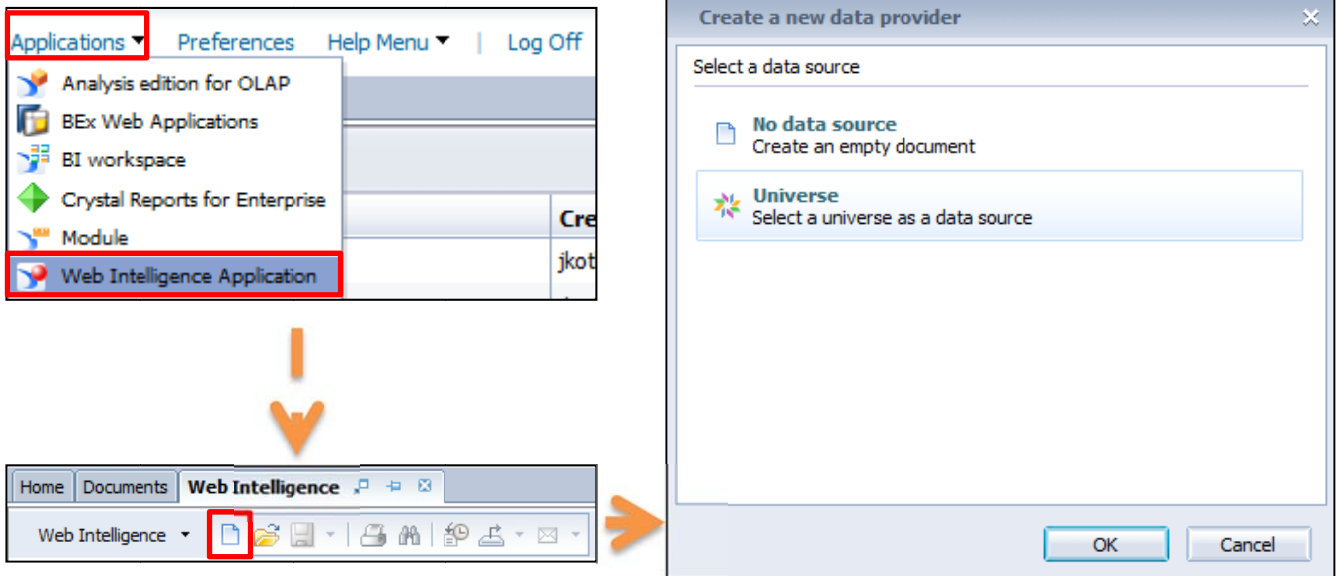


- Build your report by dragging objects from the universe into the Result Objects in the Edit Query Panel. Once you have set the objects and any appropriate filters, click "Run Query" to generate the report.



Creating New Reports: Launch Pad

- To create a new WebI document in Launch Pad, select “Applications” from the upper right hand menu pane, then click “Web Intelligence Application”.
- A new tab will open. Select the “New” icon from the toolbar.
- From the “Create a new data provider” window, select “Universe” and click OK.



- Then select the Universe from which you would like to build your report.
- Build your report by dragging objects from the universe into the Result Objects in the Query Panel. Once you have set the objects and any appropriate filters, click “Run Query” to generate the report.

