1. Log onto Business Objects.


3. Then Click on New, Web Intelligence Document.
4. Now it is time to choose a Universe that will have the data fields you will need to query or pull to design the desired report. Look over the handouts provided to determine the best Universe to use based on the data objects you see pulled below for the CHART OF ACCOUNTS Query and Report we will build.

Based on the data elements pulled, you should use the ________________________________ Universe.

**NOTE:** This Universe does not have financial information available.
5. Set up the query by pulling the data elements shown above into the appropriate sections.

6. Run your Query to generate a Report—did you get the results you wanted?

7. You can change the way the report appears by adjusting or moving the data within the grid. Go back to your report and click on EDIT REPORT.

8. Set a filter or parameter for your query to pull only the accounts for your Division by pulling the Division Code data object into the Query Filters sections and then setting it equal to your DIVISION Code. For Example → for the College of Business DIV=BA; Science & Engineering DIV=SE; Nursing DIV=NH....

9. Set other filters or sort orders for your report such as the following:
   a. Sort by DIV, then by Dept.
   b. Sort by Account Manager
   c. Sort by Account Type

   Don’t forget to name & save your newly created query & report.