Course Description
This course is designed to introduce you to the functionality of BusinessObjects and provide you with the skills needed to access, analyze, and utilize data stored in The Texas A&M University System Data Warehouse.

In this course, you will learn how to organize, manage, and distribute documents using Infoview. You will also learn how to create several basic queries and design reports using Web Intelligence that will benefit your division.

During today’s session you will learn the basics of a query and building a sample report by creating a FY2013 Chart of Accounts and then filtering the query/report to show only the results desired: by Division, Dept., or Account Manager.

Course Outline

Lesson #1 – Introduction
- Data Warehouse Portal – SSO Login
  - Overview
  - Functionality & Features
- BusinessObjects Home Page (http://bi.system.tamus.edu)
- Requesting Access to the Data Warehouse (Statement of Responsibility)
  - Areas of Data Access

Lesson #2 – Introduction to Data Warehouse Universes
- BusinessObjects Home Page (http://bi.system.tamus.edu)
- Source of Data in the Data Warehouse
- Universe Overview (Handouts for Universes)
  - Financial Universes
  - HR\Payroll Universes
  - Academic Universes
- Browser Settings and Requirements
  - Disable Popup Blocker for this site
  - Add this site to your Local Intranet sites

Lesson #3– Introduction to BusinessObjects Web Intelligence (Webi)
- Logon \ Logging off
- Changing your password and other preferences

Lesson #4 – Document Storage and Folder Navigation
- Folder structure
- Personal folders
- Public folders- TAMUS Shared → TAMU-CC Training
- Moving|copying documents
Lesson #5 – Creating Web Intelligence Documents
- Selecting a Universe
- Selecting fields in a universe
- Overview of Web Intelligence
  - Edit Query
  - Edit Report
- Query Filter – Adding fields to the query filter

Lesson #7 – Restricting Data Returned by a Query
- Modifying a query with a predefined filter
  - Modifying report to return data for your department….
- Using prompts to restrict data
  - List specific accounts
- Using complex filters
  - Operator
    - Single value
    - Range of values
  - Operand
    - Constant
    - List of values
    - Prompt

Lesson #8 – Formatting Data in Reports
- Report Formats
  - Tables
    - Sizing rows & columns
    - Adding rows and columns
    - Moving the table
    - Changing table properties
  - Cross Tabs
- Adding fields to report
- Removing fields from a report

Lesson #9 – Enhancing the Presentation of Reports
- Formatting fields
- Using breaks, sorts, and report filters
- Organizing reports into sections
- Exporting to Excel

Lesson #10 Sharing Web Intelligence Documents
- Sharing documents

Lesson #11 Scheduling Documents
- See Handout for instructions
How do I get a list of Universes?
1) Select Document List
2) Select New
3) Select Web Intelligence Document

What do the Object icons mean?

<table>
<thead>
<tr>
<th>Object</th>
<th>Example</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimension</td>
<td><img src="image1" alt="Image" /></td>
<td>Retrieves the data that will provide the basis for analysis in a report. Dimension objects typically retrieve character-type data. Example: Vendor names, dates</td>
</tr>
<tr>
<td>Detail</td>
<td><img src="image2" alt="Image" /></td>
<td>Provides descriptive data about a dimension. A detail is always attached to the dimension for which it provides additional information. Example: Address provides additional information on a vendor</td>
</tr>
<tr>
<td>Measure</td>
<td><img src="image3" alt="Image" /></td>
<td>Retrieves numeric data that is the result of calculations on data in the database. Example: Revenue is the calculation of the number of items sold multiplied by item price</td>
</tr>
<tr>
<td>Query Filter</td>
<td><img src="image4" alt="Image" /></td>
<td>Retrieves a sub-set of data from the database and returns the corresponding values to the report. Are often, but not always, connected to prompts. Example: Posting month range, COA year</td>
</tr>
</tbody>
</table>
Describe the Edit Query Tabs:

**All attributes and measures added here will be available to the report.**

**Anything here will limit the data returned to the report.**

Explain all of the operators available in the Query Filter:
<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
<th>Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to</td>
<td>equal to a value a user specifies,</td>
<td>[MbrID] Equal to 01</td>
</tr>
<tr>
<td></td>
<td>retrieve data for the TAMU only</td>
<td></td>
</tr>
<tr>
<td>Not equal to</td>
<td>not equal to a value a user specifies,</td>
<td>[Country] Not Equal to US</td>
</tr>
<tr>
<td></td>
<td>retrieve data for all countries other than the US</td>
<td></td>
</tr>
<tr>
<td>Greater than</td>
<td>greater than a value a user specifies,</td>
<td>[Fiscal Year] Greater than 2007</td>
</tr>
<tr>
<td></td>
<td>retrieve data for fiscal year after 2007</td>
<td></td>
</tr>
<tr>
<td>Greater than or equal to</td>
<td>greater than or equal to a value a user specifies,</td>
<td>[Expense] Greater than or equal to 20000</td>
</tr>
<tr>
<td></td>
<td>Expense data for expenses starting from $20,000 and greater,</td>
<td></td>
</tr>
<tr>
<td>Less than</td>
<td>lower than a value a user specifies,</td>
<td>[Fiscal Month] Less than 7</td>
</tr>
<tr>
<td></td>
<td>retrieve data for Fiscal Months before 7, (exclude Fiscal Month 7)</td>
<td></td>
</tr>
<tr>
<td>Less than or equal to</td>
<td>lower than or equal to a value a user specifies,</td>
<td>[Fiscal Month] Less than or equal to 7</td>
</tr>
<tr>
<td></td>
<td>retrieve data for Fiscal Months before 7 including Fiscal Month 7</td>
<td></td>
</tr>
<tr>
<td>Between</td>
<td>that falls between two values a user specifies and includes those two values,</td>
<td>[SubCode] Between 3000 and 3999</td>
</tr>
<tr>
<td></td>
<td>Sub Codes starting between 3000 and 3999 (including 3000 and 3999),</td>
<td></td>
</tr>
<tr>
<td>Not Between</td>
<td>that falls outside two given values a user specifies,</td>
<td>[SubCode] Not Between 3000 and 3999</td>
</tr>
<tr>
<td></td>
<td>All Sub Codes except sub codes between 3000 and 3999 (3000 and 3999 will be excluded),</td>
<td></td>
</tr>
<tr>
<td>In List</td>
<td>the same as several values a user specifies,</td>
<td>[SubCode] In list 3001; 3002; 3003</td>
</tr>
<tr>
<td></td>
<td>All data with Sub Codes 3001, 3002, and 3003</td>
<td>Separate each entry with a semicolon</td>
</tr>
<tr>
<td>Not in list</td>
<td>different from the multiple values a user specifies,</td>
<td>[SubCode] Not in list 3001; 3002; 3003</td>
</tr>
<tr>
<td></td>
<td>All data with except for Sub Codes 3001, 3002, and 3003</td>
<td></td>
</tr>
<tr>
<td>Matches Pattern</td>
<td>that includes a specific string,</td>
<td>[Account] Matches pattern, 134%</td>
</tr>
</tbody>
</table>
|                            | List all account that start with 134 | % multiple character wildcard _ (under score) one character wildcard |%
| Different from Pattern     | that doesn’t include a specific string, | [Account] Different from pattern 134%     |
|                            | List all account that do not start with 134 |                                             |
| Both                       | that corresponds to two values a user specifies, |                                             |
| Except                     | that corresponds to one value a user specifies and does not correspond to another value a user specifies |                                             |
Formatting Numbers
Right click on the cell and select “Format Number…”

Then use the familiar numeric format interface:
Course: BusinessObjects Training – Introduction to BusinessObjects

Instructor: David Gutierrez

Date of Session: 1/15/2013

Location of Session: TAMU-CC, CCH, Corpus Christi, Texas

Please complete the following evaluation of the training session:
On a scale of 1-5 with 1 = Strongly Disagree and 5 = Strongly Agree

1. The training session was helpful in learning how BusinessObjects works. 1 2 3 4 5

2. The review materials were effective and enhanced the presentation. 1 2 3 4 5

3. The facilities were satisfactory. 1 2 3 4 5

4. The discussion leaders presented the workshop effectively and were responsive to questions and concerns from the participants. 1 2 3 4 5

5. Adequate time was allowed for discussion. 1 2 3 4 5

6. After attending this workshop, I feel I will use BusinessObjects in the near future. 1 2 3 4 5

1. Topics for future meetings: _________________________________

2. Follow up questions: _________________________________

_______________________________________________________________

3. Other: _________________________________