



## **WEBI Reporting Quick Guide**

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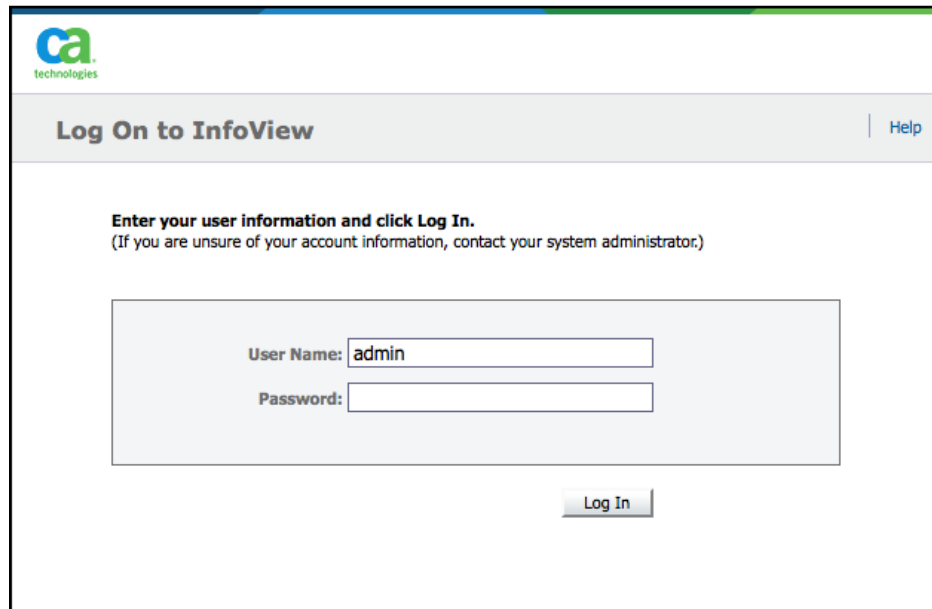
## InfoView

InfoView is the tool you use to create, edit, and access WEBI documents.

### Logging into InfoView

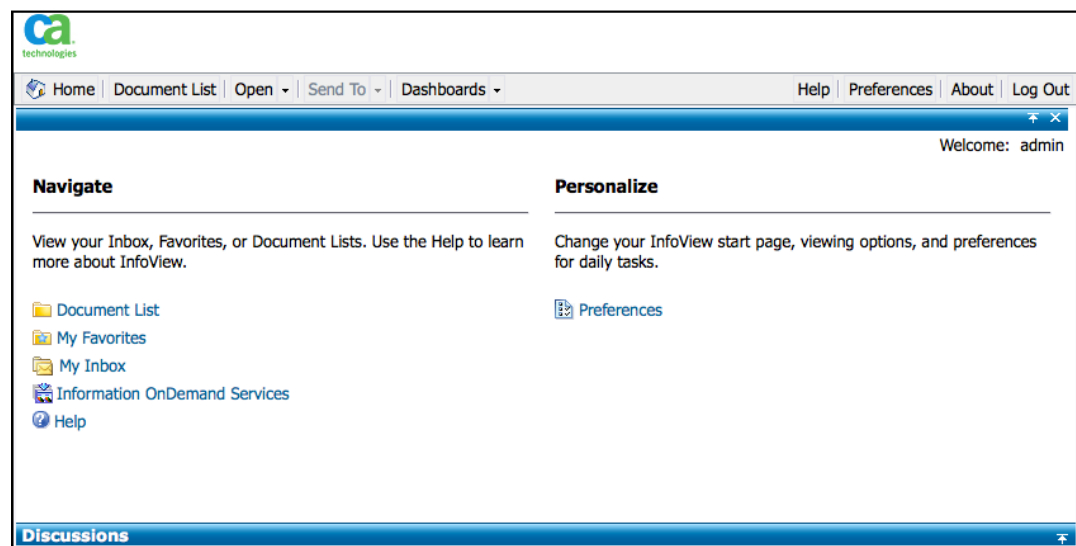
To log into InfoView, do the following:

1. Enter the URL for your InfoView installation into your browser. The InfoView login page, similar to the one shown below, appears.



The screenshot shows the 'Log On to InfoView' page. At the top left is the 'ca technologies' logo. The title 'Log On to InfoView' is centered, with a 'Help' link on the right. Below the title, a message reads: 'Enter your user information and click Log In. (If you are unsure of your account information, contact your system administrator.)'. A light gray box contains two input fields: 'User Name:' with the text 'admin' and 'Password:'. Below these fields is a 'Log In' button.

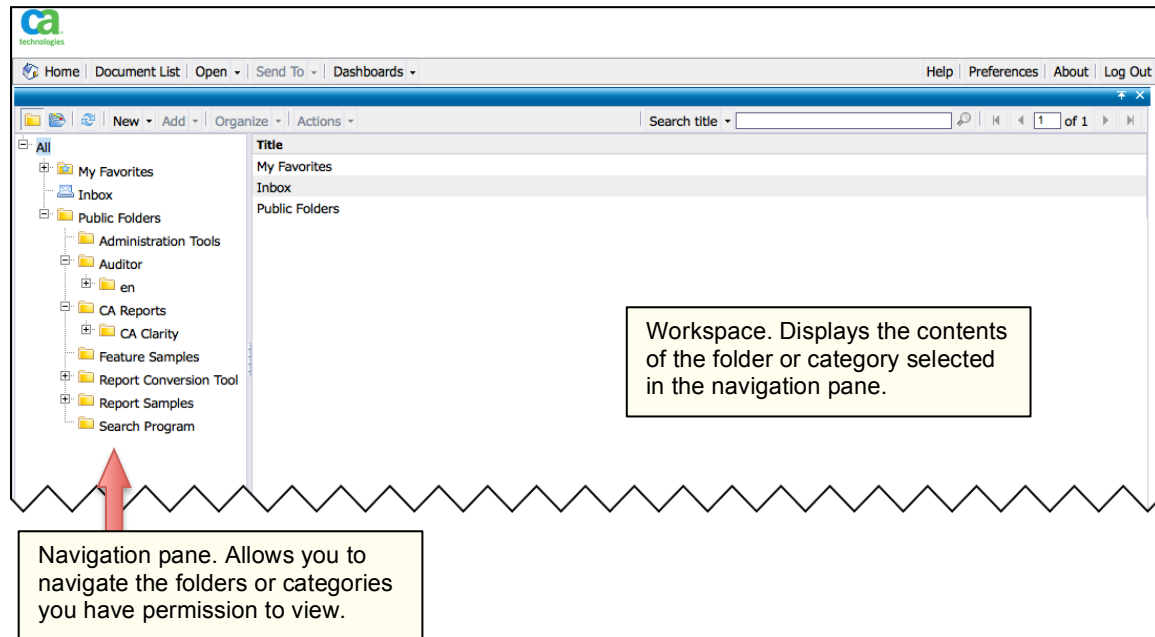
2. Enter your user name in the **User Name** field.
3. Enter your password in the **Password** field.
4. If necessary, click the **Authentication** drop-down and choose your authentication method.
5. Click **Log In**. The Clarity InfoView home page, similar to the one shown below, appears.



The screenshot shows the InfoView home page. At the top is the 'ca technologies' logo. Below it is a navigation bar with links: Home, Document List, Open, Send To, Dashboards, Help, Preferences, About, and Log Out. A 'Welcome: admin' message is on the right. The main content area is divided into two columns. The left column, titled 'Navigate', contains links for Document List, My Favorites, My Inbox, Information OnDemand Services, and Help. The right column, titled 'Personalize', contains a link for Preferences. At the bottom is a 'Discussions' section.

## The Document List

The Document list page is where you access the folders and objects used to view and create WEBI documents. You access the document list by clicking the **Document List** button in the header pane. A sample document list page is shown below.



The buttons at the top of the document list are described below.

**New** – Click to create new objects in InfoView. Use this button when you want to create a new WEBI document.

**Add** – Click to add existing objects to InfoView.

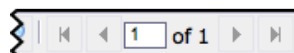
**Organize** – Click for options on how to organize an object selected in the workspace.

**Actions** – Click to access available actions for the selected workspace object.

**Search** – Allows you to search for objects.



**Page controls** – Allows you to move between pages when the workspace contains more objects than can display in a single page.



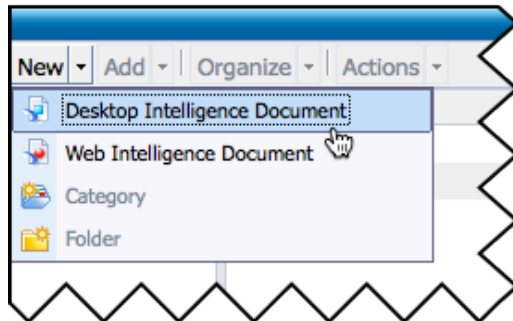
## Creating WEBI Documents

You create WEBI documents by using objects to build queries. These queries define the document's data and the reports it produces. You can edit the objects in a document you create at any time.

Each of your WEBI documents is tied to a specific universe, and the first step in creating a WEBI document is to select the universe it will use.

### To create a new WEBI document

1. Display the document list.
2. Click **New** and choose **Web Intelligence Document**.



InfoView displays the list of universes available for your installation and permissions.

3. Choose the universe you want to use for the document from the displayed list. InfoView starts the Web Intelligence java applet.



**Note:** You may receive a security warning when the Web Intelligence Java applet runs. Grant permission for the applet to run. If you don't want to see the warning message in the future, check the **Always trust content from this publisher** box.

## Universes

A universe is a view into your Clarity database, and provides you with the data you need to create your documents. The out of the box universes you will see when working with Clarity include:

**Investment** – This universe allows you to see all data pertaining to projects, programs, assets or products your business funds to help it achieve its goals.

**Investment Financials** – This universe allows you to see all data pertaining to financial information regarding your company's investments.

**Timesheets** – This universe allows you to see all data pertaining to time spent on various tasks within your company.

**Resources** – This universe allows you to see all data pertaining to your company's resources.

4. Select the objects you want to include in the document from the data manager and drag it to the result objects area. Click the symbol to the left of each class or object to show or hide its contents.

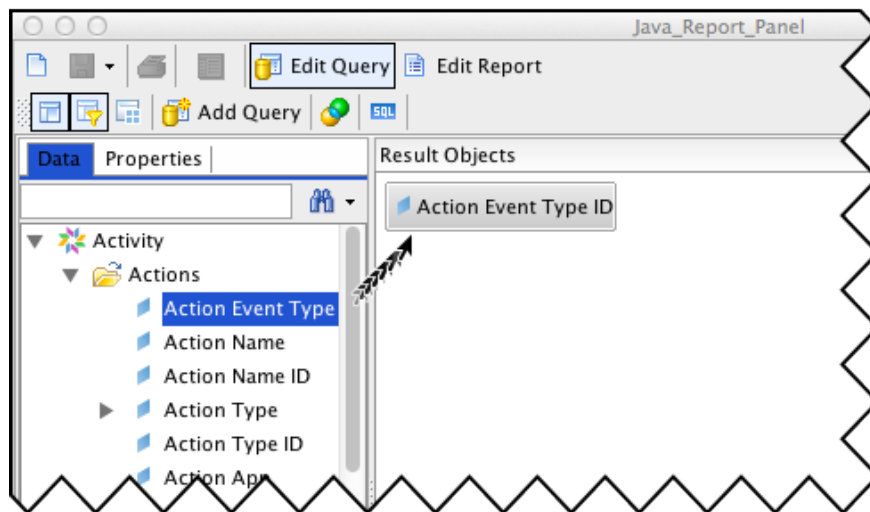
## Objects

Objects are the fields you use to create a document. The three main type of objects are:

**Dimension** ( ) – Dimension objects provides the basis for data analysis in a report. Dimension objects typically retrieve character-type data; for example, customer names, resort names, dates, etc.

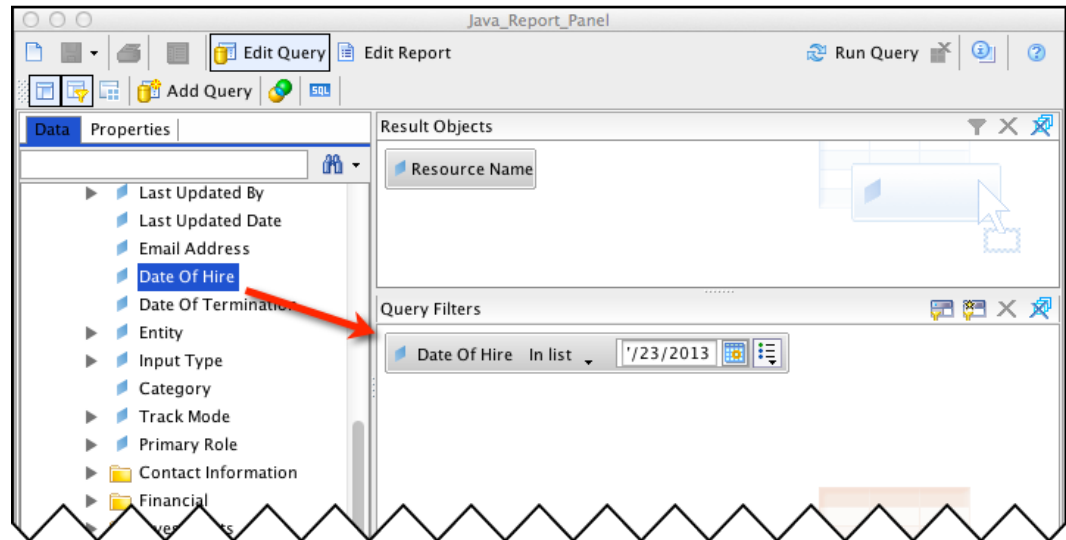
**Detail** ( ) – Detail objects provide descriptive data for a dimension. A detail object is always attached to the dimension object for which it provides additional information. For example, [Age] is a detail object that is associated with the (Customer] dimension.

**Measure** ( ) – Measure objects retrieve calculated numerical data. For example, [Revenue] is a measure object equaling the number of items sold multiplied by item price.




5. Continue dragging objects from the data manager to the result objects area as desired.
6. If you want to remove an object, click to select it, then click the remove icon ( X )

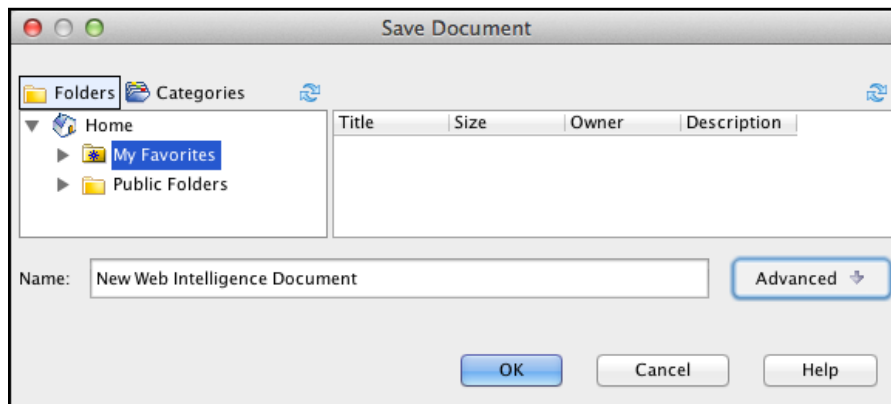
7. If you want to add filters to your WEBI document, do the following:
  - a. Select the object you want to use for a filter from the data manager and drag it to the query filter area. Once the object is in the query filters area, it displays the controls and fields you use to set the filter parameters.



- b. Set the filter parameters as desired. For more information on setting filter parameters, see [Filters and Queries](#) later in this guide.
8. Click the **Run Query** button to see the results of your query in the report view.
9. When you are satisfied with the query results, save the document.













#### To save a WEBI document

1. Click the **Save** button (  ) in the edit report toolbar. Note that the button only becomes available after you have clicked **Run Query**. When you click **Save**, the *Save Document* window, shown below, appears.



## Edit Query tools

Following is a description of the toolbar buttons that appear when you click **Edit Query**.

- |   |                              |   |  |
|---|------------------------------|---|--|
|  | Creates a new WEBI document. |  | Shows or hides the data manager.                   |
|  | Runs the query.              |  | Shows or hides the query filter pane.              |
|  | Edit the query.              |  | Shows or hides the scope of analysis pane.         |
|  | Purges data.                 |  | Add a new query to the current WEBI document.      |
|  | Displays user settings.      |  | Add a combined query (union, intersect, or minus). |
|  | Displays online help.        |  | View the query's SQL code.                         |


## Result Objects tools

Following is a description of the toolbar buttons for the Result Objects area of the WEBI interface. These buttons are active when you are working with objects in the Result Objects area.

- |   |                              |   |   |
|---|------------------------------|---|---|
|  | Adds a quick filter.         |  | Removes all objects from the result objects area. |
|  | Removes the selected object. |   |   |

## Query Filter tools





























Following is a description of the toolbar buttons for the Query Filters area of the WEBI interface. These buttons are active when you are working with objects in the Query Filters area.

- |   |                          |   |                            |
|---|--------------------------|---|----------------------------|
|  | Adds a sub-query.        |  | Removes a query filter.    |
|  | Adds a database ranking. |  | Removes all query filters. |



## Edit Report tools

Following is a description of the toolbar buttons that appear when you click **Edit Report**.

	Creates a new document.		Shows / Hides the filter pane.
	Saves the document or accesses save as options.		Shows / Hides the formula toolbar.
	Exports the report to PDF.		Launches the variable editor.
	Finds text in the document.		Shows available alerters.
	Configures the view.		Applies / Removes rankings.
	Shows/Hides the edit report view.		Adds a filter.
	Refreshes data in the work area.		Adds / Removes breaks in the document.
	Purges report data.		Applies / Removes sorting.
	Activates data tracking.		Inserts a count.
	Shows / Hides the Report Filter toolbar.		Inserts a row above.
	Adds or removes drill filters.		Changes ordering.
	Takes a snapshot of a drilled report.		Aligns blocks and cells.
	Shows / Hides user settings.		Switches between page and quick display.
	Accesses product help.		Switches between results and structure view.

## Popular Advanced Features

### Crosstab with Months

Drag a date field above a table until the pop-up help says *Drop here to create a crosstab*.

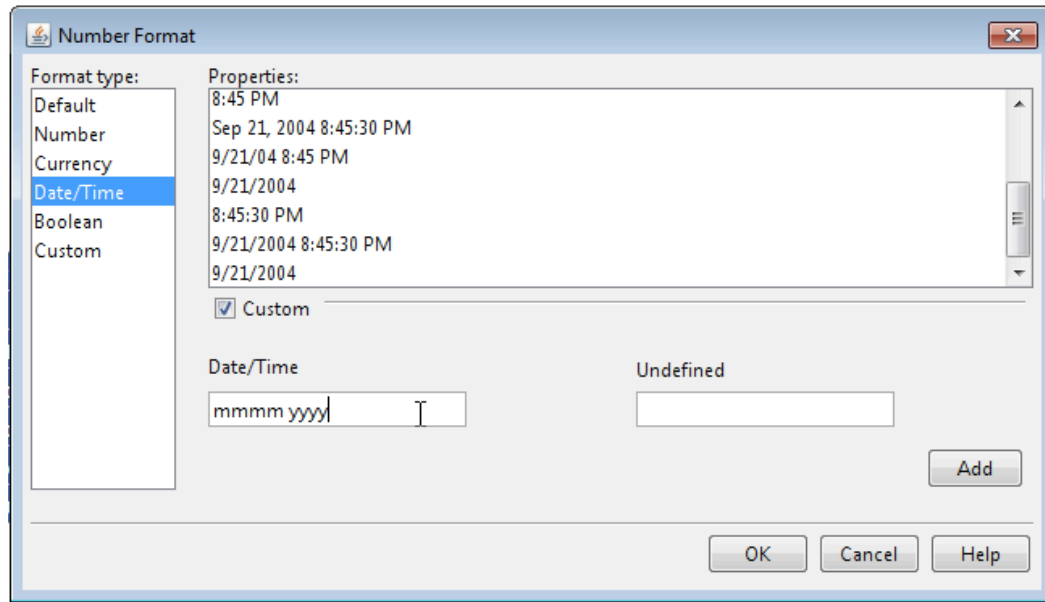
Project Name	Monthly Start Date	Labor Available Hours
Test 2 Method for Dee	9/1/13	Drop here to create a crosstab
Test 2 Method for Dee	10/1/13	184
Test 2 Method for Dee	11/1/13	152
Test 2 Method for Dee	12/1/13	160
test dee	9/1/13	160
test dee	10/1/13	184
test dee	11/1/13	152

Right click on the date field and select *Format Number*.

	9/1/13	10/1/13	11/1/13	12/1/13
Test 2 Method for Dee	160	184	152	
test dee	160	184	152	
Test Drop Down Option	160	184	152	
test for project create	160	184	152	
Test Method for Dee	160	184	152	
Test Project 98	160	184	152	
Tonya Test - Template review	160	184	152	

Select the format type date/time. Then click the checkbox *Custom*. Now you can enter the custom format in the Date/Time box. Here are a couple examples of formatting text:

mmm-yy      Jan-13  
 mmmm yyyy    January 2013





This is what the final product should look like:

	September 2013	October 2013	November 2013	December 2013
Test 2 Method for Dee	160	184	152	160
test dee	160	184	152	160
Test Drop Down Option	160	184	152	160
test for project create	160	184	152	160
Test Method for Dee	160	184	152	160
Test Project 98	160	184	152	160
Tonya Test - Template review	160	184	152	160

## Scheduling with Attachments

Right-click on a report and choose *Schedule*.

Actions ▾			Search title ▾
Title ^	Last Run	Type	
 example_1		Web Intelligence Report	
 first_example	Sep 16, 2013 11:49 AM	Web Intelligence Report	

**View**

- Properties
- Categories
- View Latest Instance
- Modify
- Schedule**
- History
- New ▸
- Add ▸
- Organize ▸

Give the scheduled instance a title.

Schedule - first\_example

▼ Schedule

Instance Title

Recurrence

Formats and Destinations

Caching

Events

Scheduling Server Group

**Instance Title**

first\_example

Set when and how often you want the report to run.

Schedule - first\_example

▼ Schedule

Instance Title

**Recurrence**

Formats and Destinations

Caching

Events

Scheduling Server Group

**Recurrence**

Run object: Now ▾

Object will run

Now

Once

Hourly

Daily

Weekly

Monthly

Nth Day of Month

1st Monday of Month

Last Day of Month

X Day of Nth Week of the Month

Calendar

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If there are any prompt fields in the report, you can set them on the prompts screen.

The screenshot shows a web interface for configuring a report. On the left is a navigation pane with a tree view containing: Schedule, Instance Title, Recurrence, Prompts (highlighted), Formats and Destinations, Caching, Events, and Scheduling Server Group. The main area is titled 'Prompts' and contains a 'Modify' button followed by the text 'values - for Actuals and Allocations by Resource Report'. Below this are several input fields: 'param\_language' with a dropdown set to 'en'; 'Enter Weekly Start Date(Start):'; 'Enter Weekly Start Date(End):'; 'Enter value(s) for Resource OBS Path:'; 'Enter value(s) for Resource Manager:' with '(optional)' and 'no value has bee' in grey; 'Enter value(s) for Resource Name:' with '(optional)' and 'no value has bee' in grey; 'Enter value(s) for Primary Role:' with '(optional)' and 'no value has bee' in grey; 'Enter value(s) for Project Name:' with '(optional)' and 'no value has bee' in grey; and 'Enter value(s) for Active (Yes/No):' with '(optional)' and 'no value has bee' in grey.

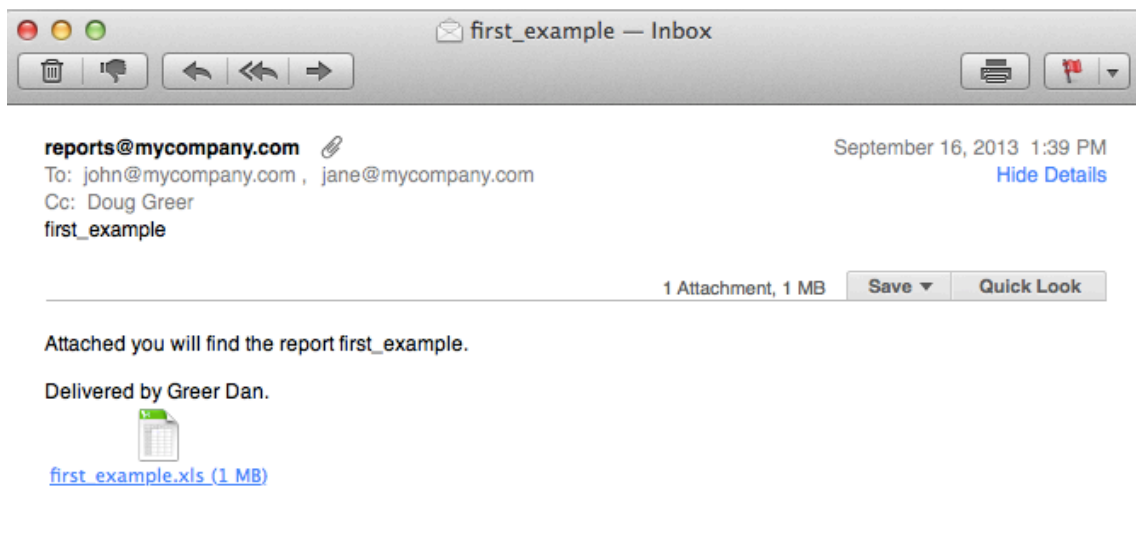
On the formats and destinations screen, select an output format, then check the box *Email recipients*.

The screenshot shows a web interface for configuring report formats and destinations. The left navigation pane is the same as in the previous screenshot, but 'Formats and Destinations' is highlighted. The main area is titled 'Formats and Destinations' and has a sub-section 'Output Format and Destination'. It is divided into two columns. The left column, 'Output Format', contains a list box with four options: 'Web Intelligence', 'Microsoft Excel' (selected with a checkmark), 'Adobe Acrobat', and 'Comma Separated Values(CSV)'. The right column, 'Output Format Details', is titled 'Destinations for Microsoft Excel - first\_example' and contains four checkboxes: 'Inbox', 'File location', 'FTP server', and 'Email recipients' (checked). At the bottom of the main area is a link 'Destinations Options and Settings'.

Click on *Destinations Options and Settings*. Then uncheck the box *Use the Job Server's defaults*.

Fill out the email settings similar to what you see below:

Here is an example of the email that would be sent with the above settings:




## Alerters

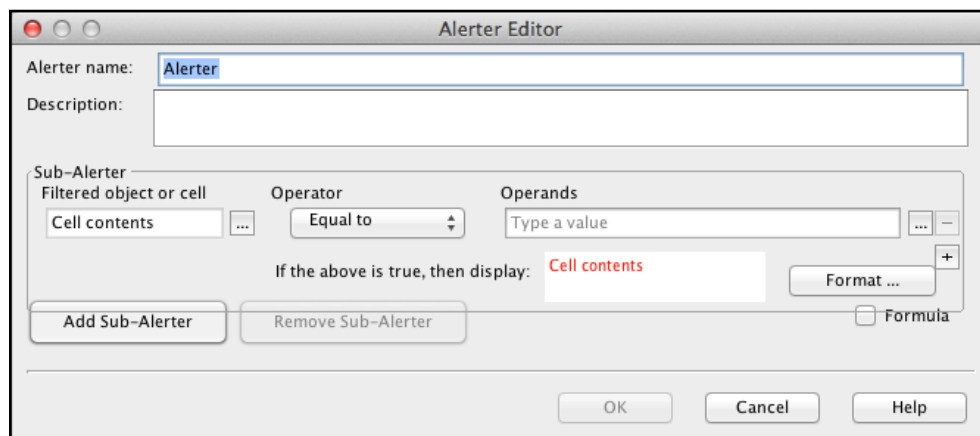
Alerters allow you to highlight results in a report that meet or fail to meet specific targets you define. Your alerters can be a simple color highlight, or can include a text comment (for example, "High Performer"). Each time the alerter triggers, the highlight and/or text comment displays.


An alerter contains the following elements:

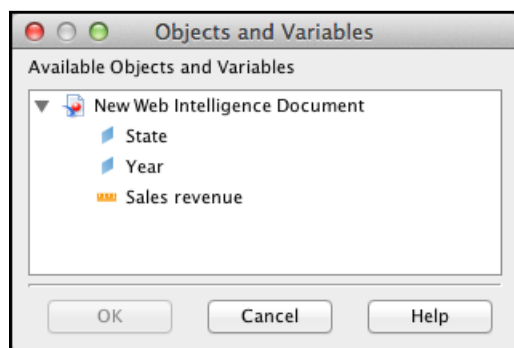
- **Name** – what you call the alerter.
- **Object or cell contents** – the object or cell contents the alerter checks.
- **Operator** – the operator the alerter uses to check the object or cell contents.
- **Operand value or another object** – what the operator uses to see if the object or cell contents triggers the alerter.
- **Conditional formatting** – how the object or cell formatting changes when the alerter triggers.



### To create an alerter

1. Make sure the **Edit Report** button is clicked in your WEBI document.
2. Click the **Alerter** button (  ). Web Intelligence displays the Alerters dialog.
3. Click **New**. Web Intelligence displays the Alerters Editor window, shown below.



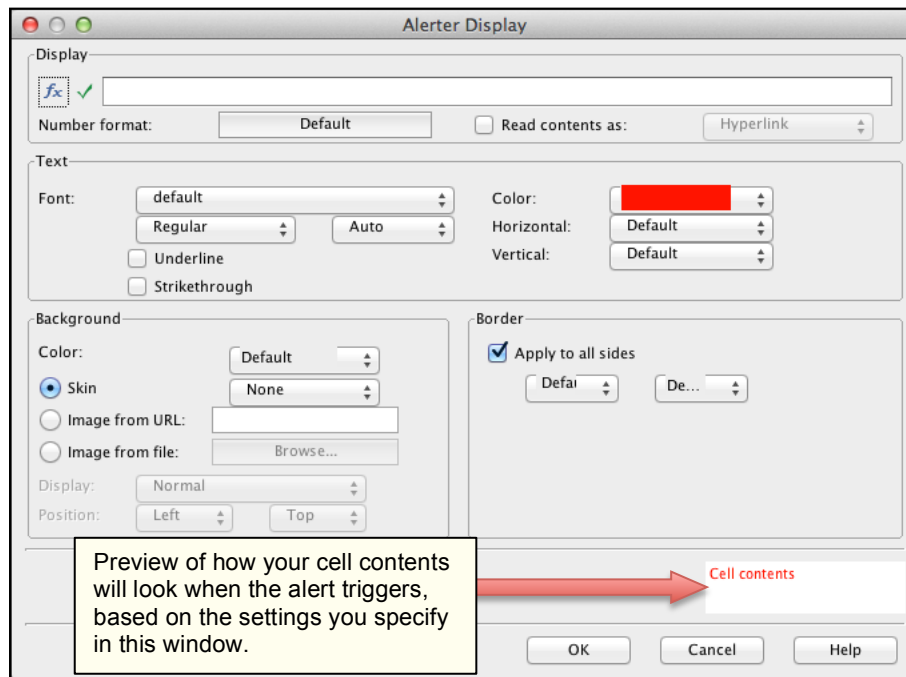
4. Give the alerter a name in the **Alerter name** field.
5. Provide a brief description for the alerter in the **Description** field.
6. Under **Filtered object or cell** click the browse button (  ). The Objects and Variables dialog appears, listing the objects and variables in your document. A sample is shown below.



7. Select the object you want to test for the alerter and click **OK**.
8. Specify the desired operator you want to use to test for the alerter using the **Operator** drop-down.
9. Specify the operands you want to use to test for the alerter in the **Operands** field.
10. If you want to create additional trigger criteria for the alerter, click the add trigger button (  ) and specify an additional trigger. If you want to remove a trigger, click the remove trigger button (  ) to the right of the trigger you want to remove. Note that you must have at least one trigger defined.



11. After you have set the desired triggers, click the **Format...** button to define what you want to happen when the alerter triggers. Web Intelligence displays the Alerter Display window, shown below.



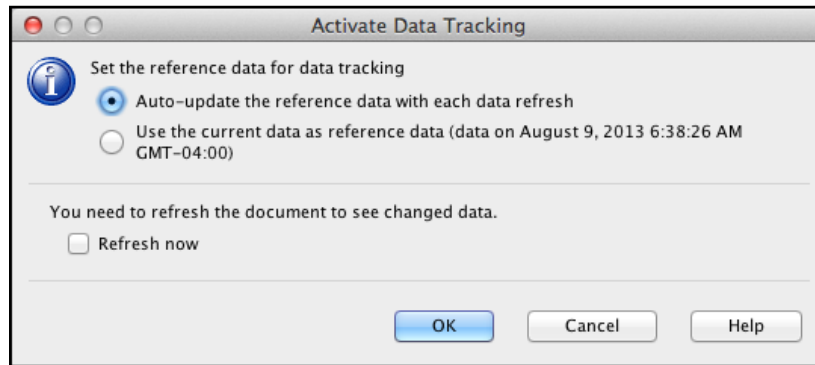
12. Specify how you want the cell contents to appear when the alerter triggers using the text, background and border controls.
13. If you want the alerter to run a formula when it triggers, click the function icon, and create the formula using the formula editor ( *fx* ).
14. When you are finished defining the alerter formatting, click **OK**.
15. Continue clicking **OK** until all the alert dialogs have closed.



## Tracking changes

Web Intelligence gives you the option to track any changes that occur in a report. When you turn on tracking, Web Intelligence will highlight any changes in a report you tell it to track (for example, insertions, deletions, change in values, etc.). Enabling tracking can allow you to quickly see changes that occurs in important data each time you run the report.


### To enable tracking

1. Click the **Track** button in your WEBI document. The following dialog appears, allowing you to define the reference data Web Intelligence will use to identify and track changes.




2. Select the desired option for your reference data and click **OK**. Note that once you enable tracking, the **Show/Hide Changes** button (  ) and **Data Tracking Options** button (  ) become available.
3. To turn off tracking, click the **Track** button again.

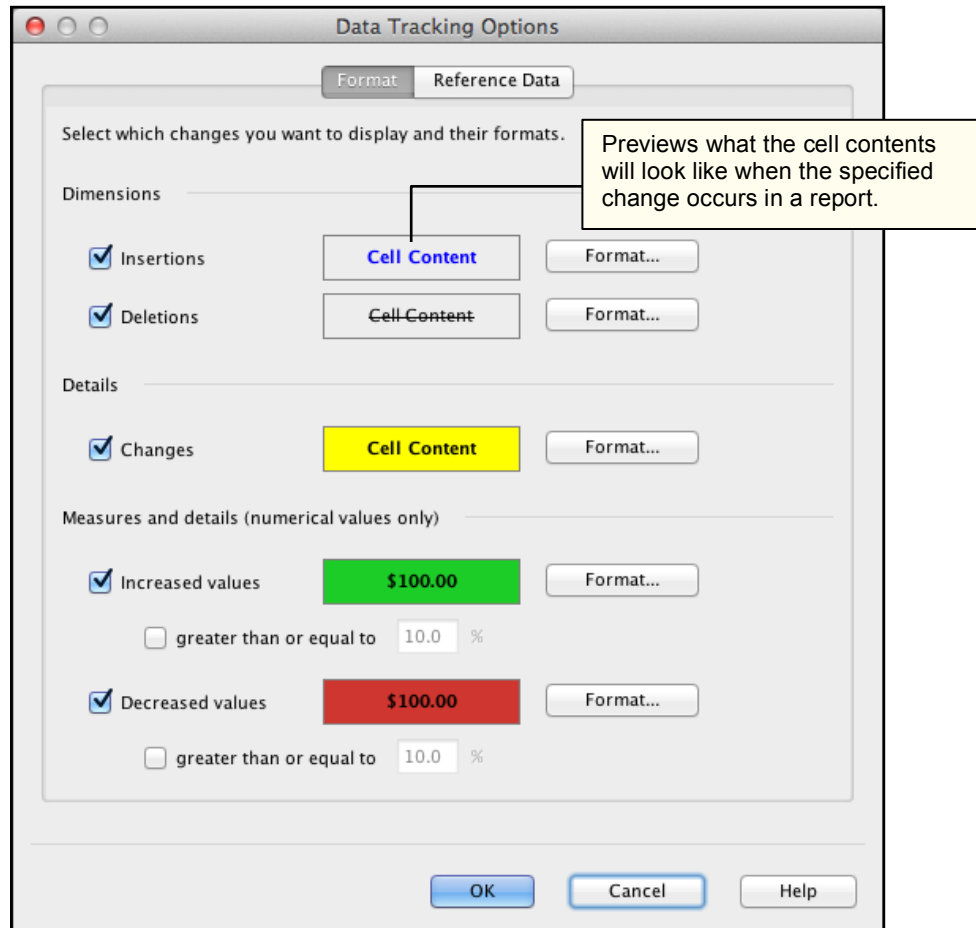
### To show or hide report changes

To show or hide report changes, click the **Show/Hide Changes** button (  ).

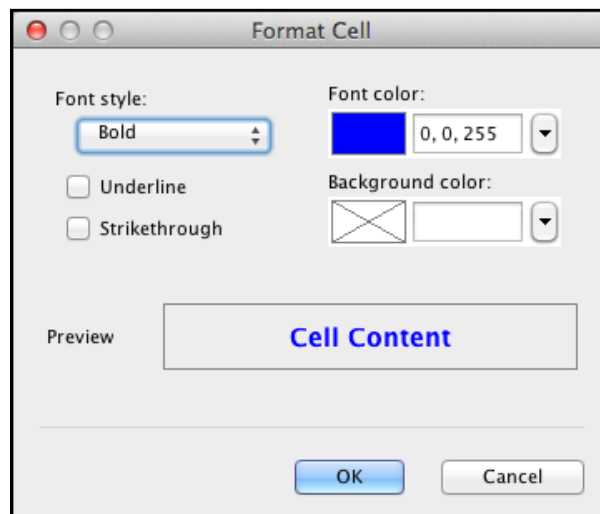
### To set tracking options

Tracking options define what Web Intelligence should treat as a report change and how it should highlight the change. To set tracking options, follow the steps below.

4. Click the **Data Tracking Options** button (  ) in your WEBI document. This button becomes available when you enable tracking. Web Intelligence displays the Data Tracking Options dialog, shown below.



5. Check the box next to each item you want Web Intelligence to consider a report change.
6. Click the **Format...** button by each item to set how Web Intelligence should modify the cell formatting when the change occurs. When you click the **Format...** button, the following dialog appears.



7. Use the dialog controls to specify font style, color and cell background color as desired.

Click **OK** when finished.

8. Click the **Reference Data** tab and specify what Web Intelligence will use for the reference report. The reference you specify will be what Web Intelligence uses to determine if any changes have occurred in the report.
9. When you are satisfied with your report tracking options, click **OK**.