



# Your PDF Guides

You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS DESKTOP INTELLIGENCE. You'll find the answers to all your questions on the BUSINESS OBJECTS DESKTOP INTELLIGENCE in the user manual (information, specifications, safety advice, size, accessories, etc.). Detailed instructions for use are in the User's Guide.

**User manual BUSINESS OBJECTS DESKTOP INTELLIGENCE**  
**User guide BUSINESS OBJECTS DESKTOP INTELLIGENCE**  
**Operating instructions BUSINESS OBJECTS DESKTOP INTELLIGENCE**  
**Instructions for use BUSINESS OBJECTS DESKTOP INTELLIGENCE**  
**Instruction manual BUSINESS OBJECTS DESKTOP INTELLIGENCE**

[Desktop\\_Intelligence\\_Access\\_and\\_Analysis\\_Guide](#)

[Desktop\\_Intelligence\\_Access\\_and\\_Analysis\\_Guide](#)



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**Manual abstract:**

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*....178 To write the formula of a user object.....*

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*187 To edit complex conditions.....*

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*188 To delete complex conditions.....*

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.....195 Using an existing query in a condition...

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196 To return list of resorts/revenues where resort country revenue > \$1000000.....

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.....197 Organizing groups of conditions...

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.....197 Groups of two conditions.....

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..199 To apply groups of conditions.....

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...200 Example: To determine which customers bought a given product in a given time period.....

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.....200 To delete groups of conditions.....

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.....201 Building combined queries.....

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201 To build a combined query.....

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201 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 15 Contents Restrictions on combined queries.



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*.208 How are lists of values created?....*

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*...208 Customizing lists of values in Desktop Intelligence..*

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*.....210 To assign personal data from an Excel file....*

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*.221 What is the euro?.....*

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*221 Displaying the euro symbol.....*

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*....221 How does the conversion work?.....*

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*222 Conversion errors.....*

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*.....222 Displaying currency formats in Desktop Intelligence.*

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*.....223 To convert to euros.....*

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*...225 To view conversion rates.....*

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*.....225 To edit information about a currency...*

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*.226 To add a new currency.....*

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*.....226 Example: To add US dollars to the currency list...*

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*....227 Fixed and fluctuating currency rates.....*

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*.....227 Triangulation.*

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.....235 Using extended syntax for advanced calculations.....

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.238 Syntax for input and output contexts.....

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.238 To add an input and output context to a formula...

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.....238 Reset contexts..

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..239 How to define reset contexts.....

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.....240 To define a reset context:

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*.240 Using reset contexts in crosstabs.....*

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*.....242 Modifying contexts with the operators ForEach and ForAll...*

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*...242 Getting the same result: ForAll <City> vs. In <Region>.....*

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*243 Using the Rank function and extended syntax.....*

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*244 To remove a break from one context and keep it in another.....*

*....245 Using the Rank function in crosstabs.....*

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*.....246 Defining contexts with keywords...*

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*....248 To define a context using a keyword.*

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251 *Frequently used terms*.....

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..251 18 *Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Contents Calculation contexts*.....

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.....258 #COMPUTATION....

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.258 #COMPUTATION in cumulative aggregations.....

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.....258 Description of #COMPUTATION in a cumulative aggregation....

..259 Solution for #COMPUTATION in a cumulative aggregation...

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..260 To fix your formula:.....

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....261 #COMPUTATION in non-aggregate formulas.....

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262 Description of #COMPUTATION in a non-aggregate formula.....

..262 Solution for #COMPUTATION in a non-aggregate formula...

.....263 #MULTIVALUE...

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.....263 #MULTIVALUE in aggregations....

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....263 Description of #MULTIVALUE in an aggregation.....

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263 Solution for #MULTIVALUE in an aggregation.....

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264 To fix your formula:.....

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..265 #MULTIVALUE in break headers and footers.....

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.....265 Description of #MULTIVALUE in a break header or footer..

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....265 Solution for #MULTIVALUE in a break header or footer.

....266 #MULTIVALUE in a cell at the section level.....

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.....267 Solution #1 for #MULTIVALUE at the section level..

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.268 Solution #2 for #MULTIVALUE at the section level.....

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....270 #.....

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...271 #ALERTER.....

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.....271 #DICT.ERROR..

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.....271 To fix this problem:...

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*..277 #UNKNOWN...*  
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*...277 To fix this problem.*  
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*.285 Operators .....*

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*.....285 Calculating a running total....*

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*.....285 Guidelines on the syntax to use in formulas....*

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*....286 Syntax errors.....*

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.....290 To rename a variable..

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.....290 To edit grouped values..

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.....291 To delete grouped values..

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291 To ungroup grouped values.....

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.....292 Adding grouped values to a drill hierarchy..

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.....292 To add Semester to the drill hierarchy.

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.....292 Managing formulas and local variables....

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*..292 Inserting local variables and formulas in a report.....*

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*...292 To edit formulas.....*

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*.....293 To edit local variables.....*

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*.....293 To delete formulas and local variables..*

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...305 To compare yearly margin..

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.....305 Using function output as input to another function..

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..307 Determining the first and last days of the previous month.....  
...307 To create a variable that returns the date of the first day of the previous month.

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.....307 To create a variable that expresses a string as a date....

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.....318 *What is an add-in?....*

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.....319 *To open the Visual Basic toolbar...*

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.....321 *Using an add-in.....*

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.....321 *To uninstall an add-in...*

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...328 Error messages..

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*Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Desktop Intelligence 1 1 Introduction to Desktop Intelligence What is Desktop Intelligence? What is Desktop Intelligence? Desktop Intelligence is an integrated query, reporting and analysis solution for business professionals that allows you to access the data in your corporate databases directly from your desktop and present and analyze this information in a Desktop Intelligence document. Desktop Intelligence makes it easy to access this data, because you work in familiar business terms and not technical database terms like SQL. Once you've used Desktop Intelligence to access data, you can present the information in reports as tables, or as sophisticated dynamic documents with drillable charts.*

*Where does the data come from? Desktop Intelligence makes it easy to access data from your corporate database because it has a business-intelligent, semantic layer that isolates you from the technical issues of the database. This semantic layer is called a universe.*

*A universe maps to data in the database, using everyday terms that describe your business environment. This means you can select exactly the data that interests you using your own business terminology. In your company or organization, universes are created by a universe designer, using Business Objects Designer. The designer then makes universes available to you and other users, to access data from the database through an intuitive, user-friendly interface.*

*Universes are made up of classes and objects.*

*Objects are elements that map to a set of data from a relational database using business terms. These objects allow you to retrieve data for your documents.*

*Classes are logical groupings of objects. Using this interface, you build a Desktop Intelligence using an editor called the Query Panel, by adding and organizing objects from a universe. Objects are elements that map to a set of data from a relational database in terms that pertain to your business situation. When you run the query, Desktop 26 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Desktop Intelligence What is Desktop Intelligence? 1 Intelligence connects to the database and retrieves the data mapped to the objects you selected. A query is a type of data provider. The data provider contains the data you have chosen to retrieve from the data source. Using this data set, you can build interactive reports. Desktop Intelligence lets you access data from a wide range of sources: from relational and multidimensional databases, from packaged applications, from personal data documents, and, using Microsoft Visual Basic for Applications procedures, from virtually any source.*

*Presenting and analyzing data Once you have the data you need, you can present it in a number of ways. You can present it in a simple table. Alternatively, you can create sophisticated reports containing large amounts of data, organized and formatted to make it easy to go directly to pertinent information. You can add images and embedded objects and format your documents to high presentation standards. On-report analysis allows you to switch your business perspective by dragging and dropping data, insert on-report calculations or drill into a report for detailed information. Sharing information You can quickly and easily share the documents you have created with other users in your company, either by sending them directly to selected individuals or groups, or by*

*Exporting them to the repository as Folders or Categories. When you distribute documents in these different ways, you use the Desktop Intelligence repository. The repository stores the documents you send so that other users can retrieve and view them. It also stores information about the documents it stores, such as name of sender, date, and also which users in the company have the right to retrieve and view a document.*

*Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 27 1 Introduction to Desktop Intelligence What is Desktop Intelligence? You can Import documents that other users have sent, using WebIntelligence documents which you can open and view in Desktop Intelligence.*

*You can also use InfoView to send documents for scheduled processing. Note: For information on sending, retrieving, printing, publishing and scheduling documents, see the InfoView User's Guide. You can open an electronic version of this guide directly from the Desktop Intelligence Help menu. Security The repository is set up and administered by the Business Objects administrator who grants all user rights. The Business Objects administrator does the following: . . . defines the parts of the Desktop Intelligence interface you can access restricts the availability of Desktop Intelligence functionality, such as access to certain menu commands defines your database connection defines the universes you can access for creating and editing queries The rights accorded to each user define the user's profile.*

*This profile-based security system allows a single document to be distributed to many users -with end users having access only to the information they are authorized to see. Keeping a document's data up-to-date Databases are regularly updated with new data. A document generated at a given point in time reflects the data as it existed at that time, but it may be inaccurate now. Desktop Intelligence lets you update the data in a document while keeping the same presentation and formatting, either manually, or automatically at specified times.*



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When you update a document, Desktop Intelligence reconnects to the database, and retrieves the updated data.

This is called a document. 28 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Desktop Intelligence Demo materials and samples 1 Demo materials and samples To help you get up and running with Desktop Intelligence, demonstration databases, universes and sample reports are included in the Desktop Intelligence demo kit. There are two demonstration universes, Island Resorts Marketing and eFashion. The examples in this user's guide are based on eFashion and Island Resorts Marketing. The eFashion demo database contains retail data from a clothing chain. It tracks 211 products (663 product color variations), sold over 13 stores in the US, over three years. The Island Resorts Marketing universe is described in more detail in the section on Demonstration Materials. Upgrading from earlier versions of Desktop Intelligence For users who are upgrading from an earlier version of Desktop Intelligence, previously known as BusinessObjects. Documents created in BusinessObjects from 5.1 to 6.

5 are fully compatible with Desktop Intelligence. The Repository Desktop Intelligence uses the repository to secure access to your data warehouse and to provide an infrastructure for distributing documents to be shared with others. You select the documents you want to import from or export to Desktop Intelligence. Folders and Categories The Repository organizes documents into Folders and Categories in an orderly system that permits easy access for you and others working with documents. Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 29 1 Introduction to Desktop Intelligence Folders and Categories Folders Folders are the physical place where documents are stored. Only one document with a given name may be placed in a folder or category. It is possible to place documents in several categories. If necessary, change the name of the document or give it a number to place it in the same folder or category. Shortcuts and copies may be placed in other folders or categories. Your Repository is organized into Folders and Categories to help you organize your documents.

It is possible to create or delete sub-folders. Make sure that your document is saved before you export it to the repository. You are able to browse the Folders structure or the Categories structure. Categories Categories are used for classifying information regardless of its storage location. There are 2 types of folders: · My Folders with 2 sub-folders · · · Favorites (Generally reserved for often used documents) Inbox (Generally reserved for documents received from other users Public Folders (For shared documents).

) There are two types of Categories: · · Corporate Categories Personal Categories 30 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence 2 2 Introduction to Accessing Data with Desktop Intelligence What data sources are available? What data sources are available? Desktop Intelligence lets you access data from a wide range of sources. You can access data from a number of sources: · · · · · Universes Personal Data Files Stored Procedures Freehand SQL Server XML Data Provider VBA Data Provider How do you access data sources? Desktop Intelligence lets you access data through a graphical user interface. You need no technical knowledge of the underlying data structures to get the information you want.

What you do need, however, is knowledge of your business. To access a data source with Desktop Intelligence, you build a data provider.

The types of data provider that Desktop Intelligence supports are described in the table below: Data provider Description CD Install Universes A universe consists of classes and objects that represent the parts of a database that contain the data you need, in everyday language that is Yes meaningful to you. In a query on a universe, you select the objects, such as Customer Name, Year, or Region. 32 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence What data sources are available? 2 Data provider Description You can retrieve data from Excel, dBASE and text files. CD Install Personal data files Yes Stored procedures You can only use stored procedures if your supervisor or IS department has provided them, and if the RDBMS at your site supports them. Yes A stored procedure is an SQL (Structured Query Language) script, saved and executable on your database. You can use free-hand SQL if you are familiar with SQL, which is the language used to interact Yes with relational databases. Only in 2-tier mode In free-hand SQL, you open or write a SQL script, which you then run against the database. You can retrieve data from XML files Yes Free-hand SQL XML Data provider VBA Data provider Procedures written in Microsoft Visual Basic for Applications (VBA) enYes able you to retrieve data from almost any data source.

Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 33 2 Introduction to Accessing Data with Desktop Intelligence What data sources are available? Can all Desktop Intelligence users build data providers? Your Desktop Intelligence supervisor can restrict access to certain types of data providers, or even certain objects within a universe. As a result, you might be able to build queries on universes but no other type of data provider, and then be able to use only certain objects in the universe.

The way the supervisor sets up access to data providers and other Desktop Intelligence features depends entirely upon the query and reporting needs of your organization. By default, all Desktop Intelligence users can refresh data providers to get the latest information from their database. Who sets up database connections? To access and retrieve data from a database, you need a database connection. For example, if your company or organization stores its corporate data in an Informix database, someone somewhere has to make Desktop Intelligence "talk" to this data source. In most cases, you, the Desktop Intelligence end user, do not have to concern yourself with setting up database connections. Thus, Desktop Intelligence lets you get the information you need, without technical knowledge of what's going on behind the scenes. This does not mean that power users cannot define their own database connections. For example, in free-hand SQL, you can define a connection, write an SQL script, then run the script against the connection you created. The following table describes who sets up database connections for the various Desktop Intelligence data providers. 34 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence What data sources are available? 2 Data provider Who sets it up? The universe designer sets up the connection in the universe, so the connection is hidden when you build or edit queries.



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*Note: The supervisor may modify the existing connection or assign a new connection to the universe. The supervisor creates the connection to access a stored procedure. In free-hand SQL, you can create your own connection to the database. Once you have created the connection, you can make it available to other users. When you access data in a personal data file or XML file, you select the file and in doing so, you "connect" to it. This is not a technical task, it's just a question of selecting the right file. A VBA procedure runs a VBA macro that retrieves data for your Desktop Intelligence report.*

*The person who creates the macro defines the connection to the data source in the macro code. Queries on universes Stored procedures Free-hand SQL Personal data files and XML files VBA procedures Restrictive connections If you are working with a universe that is set up with a restrictive connection, you need to supply the database username and password to run a query. This username/password is not the one that you use to log onto Desktop Intelligence; it is the username/password of the underlying database (for example an SQL Server database) that the universe accesses. This database normally remains hidden, but the universe designer can set up a restrictive connection to add an extra layer of security. Depending on the type of*

*Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 35 2 Introduction to Accessing Data with Desktop Intelligence Workflows for accessing data restrictive connection, you need to supply the database username and password in some or all of the following situations:*

- When you first run a query (for more information on running a query, see "Building a query in the Query Panel and running the query.

- When you refresh a query (for more information on refreshing a query, see Refreshing Desktop Intelligence Documents in chapter 1 of the Desktop Intelligence User's Guide: Report Techniques and Formatting. When you parse a query to test its validity (for more information on parsing a query, see "Using SQL from Desktop Intelligence queries." · If you do not know your database username and password, see your Desktop Intelligence administrator. Can you combine data from different sources in one report? Yes. With Desktop Intelligence, you can build powerful reports with data from corporate databases that you can access using queries on data providers such as universes and free-hand SQL, and data from your own files such as spreadsheets and text files.

*Workflows for accessing data There are two basic workflows for building data providers to access your data in Desktop Intelligence. You can build a data provider for two reasons:*

- to create a new document to work with an existing document. Also with an existing document, you can obtain a different set of results by editing a data provider. The following sections explain these different workflows.

*36 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence Workflows for accessing data 2 Building a data provider when you create a new document Building a data provider when you create a new document is a typical way of using Desktop Intelligence. You create the document in order to see your business data; to do that, you have to build a data provider to access data from a data source. To help you build a data provider when you create a new document, Desktop Intelligence launches the New Report Wizard when you start the application for the first time. To build a new data provider using the wizard 1. Run the New Report Wizard on the Standard toolbar. 2. Select an option for the report layout. 3. Click Begin.*

*The Specify Data Access dialog box appears.*

*4. Make a selection depending on how you want to build your query (use the Choices element to wrap the following list:*

- To build a query on a universe, click Universe, then Next.
- To build a query based on a stored procedure, free-hand SQL, personal data file, XML file, or VBA procedure, click Others, then select a data source from the list, then click Finish. To build a query on a universe using the Query Panel, click Universe, then Finish.
- If you selected Others in the previous step, a dialog box appears to let you build your data provider and retrieve the data for your report.

*If you selected Universe and clicked Finish, the Query Panel appears. In the Query Panel, you can view all the classes and objects in the universe you selected, and use these to build your query. For more information, refer to "Displaying the Query Panel." (ts\_note: Make this a related-link.)*

*Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 37 2 Introduction to Accessing Data with Desktop Intelligence Workflows for accessing data Setting a default type of data provider for new documents Do you always use the same type of data provider when you create new documents? If so, you can set an option so that the type of data provider you always use will be preselected in the New Report Wizard.*

*This means that you will not have to select the type of data provider you want every time you create a document. If you always use queries on universes, you can also select the default universe to use. To set a default type of data provider: 1. 2. 3. 4. Click Options on the Tools menu. Click the New Document tab.*

*Click Invoke the New Report Wizard with the following settings. In the Data Access group box, select the type of data provider you want to use.*

- Use a Default Universe lets you select the universe you want.
- Use a Different Data Provider lets you select a data provider type from the drop-down list.

*5. Click OK to close the dialog box. Building a query in an existing document You don't have to create a new document every time you want to see new data in Desktop Intelligence. You can build data providers inside existing documents. This feature enables you not only to see more data that comes from the same source as the document's initial query, but also to combine data from different sources in the same report. Your company's sales information is stored in your corporate database, which you access by running a query on a universe in Desktop Intelligence. You already have a Desktop Intelligence document containing this information. You keep your quarterly targets in a Microsoft Excel spreadsheet and you want to compare the corporate figures with your personal data.*

*38 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence Workflows for accessing data 2 To compare the corporate figures with your personal data 1. 2. 3. 4. 5.*

*6. Open the document containing the corporate data. Click New Data Provider Click Access new data in a different way. Click Personal data files. Click Finish.*

*In the dialog box that appears, browse to the Excel file that contains your personal data.*



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7. Click Run. Desktop Intelligence makes the data from the spreadsheet available in your report. To build a data provider inside an existing document 1. 2. 3. 4. Click New Data Provider on the Data menu. Follow the wizard to select the type of data provider you want.

Build the data provider. Click Run. Desktop Intelligence retrieves the data, making it available in the document. Tip: If you want to see the new data as soon as Desktop Intelligence has retrieved it, use the Table, Crosstab or Chart commands on the Insert menu, then follow the wizard to access the data you want. Editing data providers Editing a data provider means changing its definition in order to bring new or different data to the document you are working on. It's often quicker and easier to edit a data provider than to build a new one. Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 39 2 Introduction to Accessing Data with Desktop Intelligence Workflows for accessing data Example: Adding regional information to an existing document You're working in a document with sales figures by year, but you need some regional information to complete the picture. Rather than building a new query, which means creating multiple data providers in the same document, To add result objects to the existing data provider: 1. Click Edit Data Provider on the Data menu. In the Query Panel, add the objects you want (for example Region, City) to the Result Objects box.

You do this by double-clicking each object's icon in the Classes and Objects list. 2. Click Run. Desktop Intelligence returns the new data to the report, and, provided that your data is displayed in a table, the new columns automatically appear. Other reasons for editing a data provider Other reasons for editing a data provider include the following: · · You want to restrict the volume of data returned by setting conditions or maximum number of rows.

You want the data to be sorted in a given order at the query level. To edit a data provider 1. Click Edit Data Provider on the Data menu. 2. The next step depends on whether or not the document contains more than one data provider.

If the document contains... One data provider Then... 40 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence Using the repository 2 If the document contains... More than one data provider Then.

.. Select the data provider you want to edit, then click OK . 3. Edit then run the data provider. Desktop Intelligence returns the new data set to your report. To cancel a data provider Cancelling a data provider means interrupting the data provider while it is fetching data to create or refresh a report. 1. To cancel a data provider, press the Esc key. The Interrupted Execution dialog box appears on your screen.

2. Select which results you want to view in the report: If you Then Want to view the results that will be Click Continue the execution. created by the data provider you were running, Want to view the partial results creat- Click Stop the execution and keep ed by the data provider when you in- the partial results . terrupted the execution, When you have partial results in a report, the Partial Results notification appears in the status bar. Want to discard the results created Click Discard the results.

by the data provider when you interrupted the execution, Want to view the results of the previ- Click Keep the results of the previous execution. Using the repository Documents are placed in Folders and Categories in the repository Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 41 2 Introduction to Accessing Data with Desktop Intelligence Exporting to the repository See "The Repository". Exporting to the repository When you create a document, before you can Export it to the Repository for the first time save the document and Export it to an existing folder or create a new folder. Folders contain actual copies of your files, while Categories simply point to documents. To Export a document to the Repository 1.

With a saved document open in your Desktop Intelligence Administrator. 2. Click Export to Repository in the File menu. Browse to the folder where you want to export your document, or create a new folder. 3. Highlight the folder where you want to export the document. 4. Click Add. If your document has the correct name..

. 5. 6. 7. 8. 9. Click OK. Click OK again. Enter the summary information. Click OK.

Click Replace. If you do not click Replace, the export is aborted. 10. Click OK. Creating a New Folder When you export a document to a folder you must place it in an existing folder or create a new folder.

42 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence Managing Categories 2 To create a new Folder 1. 2. 3. 4. 5.

Click Export to Repository. Highlight the file where you want to create your folder. Click New. Type the name of the folder. Click OK. Exporting to a Category Save files to your local disk before exporting them to the repository for the first time. It is best to export the document to a folder before exporting it to a category. To place a file in a Category 1. 2. 3.

4. Open your file in the Desktop Intelligence Administrator. Click Export to Repository in the File menu. Click Categories at the bottom of the Dialog Box. Activate the Category where you want to send your document. You can check more than one Categories. 5. Click OK. 6. Click Add.

Managing Categories When exporting a document to the repository, it is also possible to create a new category, delete an existing category, or rename one. To manage your Categories 1. Open your file in the Desktop Intelligence Administrator. Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 43 2 Introduction to Accessing Data with Desktop Intelligence Managing Categories 2. 3.

4. 5. 6. Click Export to Repository in the File menu. Click Categories at the bottom of the dialog box.

Click Manage. Browse to the category you want to manage. Activate the category. · Add a Category · Delete a category Edit a category To Add a category to the list of categories With the Send to dialog box open: 1. 2. 3. 4. Click Categories at the bottom of the dialog box. Click Manage. Activate the category you want to manage.

Click Add. To Delete a category from the list of categories 1. 2. 3. 4. 5. 6. 7. Open your file in the Desktop Intelligence Administrator. Click Export to Repository in the File menu.

Click Categories at the bottom of the dialog box. Click Manage. Browse to the category you want to delete. Activate the category. Click Delete.

To Edit a category 1. Open your file in the Desktop Intelligence Administrator. 2. Click Export to Repository in the File menu. 3.

Click Categories at the bottom of the dialog box. 44 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Introduction to Accessing Data with Desktop Intelligence Importing from the repository 2 4.



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Click Manage. 5. Browse to the file you want to edit or rename. 6. Click Edit. The right to create or delete a folder is controlled by the server. If you receive an error message, see your server administrator. Importing from the repository You can import from folders or categories.

To import a document from a folder in the repository 1. Choose folders or categories at the bottom left of the Browse Categories box. 2. Click Import from Repository in the File Menu. 3. Browse to the document you want to import. 4. Select the document. 5. Select Open on retrieval. 6. Click Retrieve. Retrieving different instances of a given document If you have more than one instance of a file, the Retrieve instances button is activated. Select the file you want to Import to the Repository. Note: · · Instances are placed in folders using InfoView.

Scheduling options are accessed from InfoView. If the Retrieve Instances button is available, there is more than one instance of the document..

Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 45 2 Introduction to Accessing Data with Desktop Intelligence Importing from the repository To choose an Instance of a document 1. Click the Retrieve Instance button.

2. Choose an instance of the document. 3. Click Retrieve. 46 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Building Queries on Universes 3 3 Building Queries on Universes Overview Overview This chapter is about accessing data using Desktop Intelligence native technology: building queries on universes. What is a universe? Desktop Intelligence universes make it easy to access data because they contain objects of data in business terms that are familiar to you. What's more, you need no knowledge of the database structure, or of database technology, to be able to create powerful reports with data that is relevant to your work. Universes provide the business-intelligent, semantic layer that isolates you from the complexities of the database. A universe maps to data in the database in everyday terms that describe your business situation. Universes are made up of classes and objects.

For example, the objects in a human resources universe would be Names, Addresses, Salaries. Classes are logical groupings of objects. Each class has a meaningful name, such as Vacation (for objects pertaining to employee vacations). Each object maps to data in the database and enables you to retrieve data for your reports. Who is responsible for creating universes? In your company or organization, universes are created by a universe designer, who works with an application called Designer. The designer then makes universes available to you and other users at your site, so that you can access the data you want from the database. Two demo universes that map to demo databases are delivered with Desktop Intelligence. A full description of these is provided in Demonstration materials on page 49 below. 48 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Building Queries on Universes Overview 3 What are universe queries? Universe queries enable you to retrieve data from a database via a universe. You build a query to bring data to a report, either when you create the report or when you want to view new data.

When you build a query, you select objects from a universe, then run the query. Desktop Intelligence connects to the database, and retrieves the data mapped by the objects you selected. Desktop Intelligence retrieves this data by executing an SQL query against the database; Desktop Intelligence generates this SQL according to the objects you select. SQL stands for Structured Query Language; it is the query language understood (in various dialects) by all relational databases. Note: SQL queries generated by Desktop Intelligence cannot exceed 65,536 characters in length.

Demonstration materials Several demonstration databases, and their accompanying universes and reports are included in the Desktop Intelligence package. They are installed with Desktop Intelligence, and used in the examples in this guide. The databases are compatible with Microsoft Access 2000. The Desktop Intelligence CD also includes generic SQL scripts and data files to allow a database administrator to build the databases on any RDBMS. Island Resorts Marketing The Island Resorts Marketing universe accesses data in the club.

mdb database. It is designed for an imaginary tour operator that runs beach clubs in different resorts around the world. You use it to retrieve data on sales and reservations for resorts and customers, over time. The illustration below shows the universe's classes and objects as they appear in Desktop Intelligence.

Because universes provide a business-intelligent semantic layer between you and the database, the names of the classes and objects in the Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 49 3 Building Queries on Universes Overview demonstration universe are self-explanatory. For example, the Resort class contains objects that map to data on resorts: · · · The Resort object retrieves the names of the company's resorts. The Service object retrieves data for the types of services in each resort: accommodation, food and drinks, recreation. The Service Line object retrieves data for the types of service in each resort, for example family suite (for accommodation), restaurant (for food and drinks). For more information on classes and the different types of objects you find in Desktop Intelligence, refer to Classes and sub-classes on page 50 and Dimension objects, measure objects and detail objects on page 50. Classes and sub-classes The demonstration universe contains five classes: Resort, Customer, Sales, Reservations and Measures.

The purpose of classes is to provide logical groupings of objects. For example, the Customer class contains objects that you map to data on customers in the database. The Customer class contains a sub-class, which is entitled Sponsor. A sub-class is to a class what a sub-folder is to a folder. Dimension objects, measure objects and detail objects When creating universes, universe designers define and qualify objects. The qualification of an object reveals how it can be used in analysis in reports. An object can be qualified as a dimension, a detail, or a measure. Each type of object serves a different purpose: Measure objects are semantically dynamic: the values they return depend on the objects they are used with. For example, if you include Resort and Revenue in a query, revenue per resort is calculated. If you include Customer and Revenue, revenue per customer is calculated, and so on.

50 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Building Queries on Universes Building a basic query on a universe 3 eFashion The eFashion demo database contains retail data from a clothing chain. It tracks 211 products (663 product color variations), sold over 13 stores in the US, over three years. It contains approximately 90,000 rows of data.



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*Building a basic query on a universe You can bring data to a report by building a query on a universe. You complete this task in the Query Panel, a graphical interface that enables you to build a query by dragging and dropping objects from the universe.*

*The Query Panel is illustrated in Displaying the query panel on page 51. There are three steps in building a basic query on a universe. . . . Display the query panel Build the query in the Query Panel and run the query Save the query definition Displaying the query panel How you display the Query Panel depends on whether you're creating a new document or building a new query inside an existing document. You can use the following commands and toolbar buttons. If you want to create a new document, to edit a query or other type of data provider in the current document, Then click the New Report Wizard button (Standard toolbar).*

*click Edit Data Provider on the Data menu. to create a new query or other type of click New Data Provider on the Data data provider in the current document, menu. If you need more information, refer to "Workflows for accessing data." Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 51 3 Building Queries on Universes Building a basic query on a universe The Query Panel displays the contents of your Desktop Intelligence universe and lets you select data with simple mouse clicks. In the Classes and Objects tree on the left side of the screen, display is as follows: . . . Classes appear as folders. Objects appear as cubes (for dimensions), spheres (for measures), or pyramids (for details). The button on the bottom left, under the Classes and Objects tree, with an icon showing the different kinds of objects, is selected by default and controls display of the universe's classes and objects. The button to its right displays the universe's predefined conditions. The search box next to these buttons lets you type a search string to search for objects in the universe. The Options button enables you to set options before running the query, for example to specify a maximum number of rows.*

*The Result Objects box displays the objects that are included in the query. The Conditions box displays the conditions limiting the data returned by the query. The Save and Close button lets you save the query you have defined without running it. You can run it later on by using the Refresh command. When you click View, the raw data retrieved by the query appears in the Data Manager. From the Data Manager, you can edit, accept or cancel the query. When you click Run, the query connects to the database and the data appears in the report. To display the query panel You've launched Desktop Intelligence for the first time and the New Report Wizard appears. You use the wizard to display the Query Panel for the Island Resorts Marketing universe. 1.*

*In the New Report Wizard, click Begin. 52 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Building Queries on Universes Building a basic query on a universe 3 The Specify Data Access dialog box appears, with the Universe option already selected. 2. Click Next. The Select a Universe dialog box appears. 3. Click Island Resorts Marketing: 4. Click Finish. The Query Panel appears with the classes of the Island Resorts Marketing universe is displayed. Building a query in the Query Panel and running the query Building and running a query includes the following steps: . . . . Display all the objects that you can include in a query Include objects in a query Remove objects from a query Change the order of objects in a query Run the query Steps 2, 3, and 4 are not always sequential.*

*For example, you can include objects in a query, remove some of them, and then include other objects. Displaying the objects that you can include in a query In the Query Panel, the Classes and Objects box presents the classes, sub-classes and objects of the universe that you are using. Objects represent the data that you can retrieve via the universe. Classes are logical groupings of objects. Classes can also contain sub-classes, as folders can contain sub-folders. When the Query Panel appears, only the universe's classes are visible. Click the + plus to the left of a class icon to view the class's objects and sub-classes.*

*Desktop\_Intelligence\_Access\_and\_Analysis\_Guide 53 3 Building Queries on Universes Building a basic query on a universe Searching for objects You can search for an object by typing its name in the search box. Desktop Intelligence opens the object folder and selects the object. This is a useful feature if your universe is large with many objects.*

*Including objects in a query When you include an object in the query, you instruct Desktop Intelligence to retrieve the data for that object from the database. For example, to display revenue by resort in your report, you include the Revenue and Resort objects in the query. You include an object in a query by placing it in the Result Objects box. There are three ways of doing this. You can: . . . Click an icon in the Classes and Objects list, then drag it to the Result Objects box. Double-click an object in the Classes and Objects list. Click a class folder and drag it to the Result Objects box. All the objects in the class appear in the Result Objects box. Once you have placed objects in the Result Objects box, you have built a basic query. To remove objects from a query 1.*

*In the Result Objects box, click the icon of the object you want to remove. 2. Drag the icon to the Classes and Objects list. 3. Press the Delete key, or right-click the icon and click Delete.*

*To change the order of the objects in a query The order in which the objects appear in the Result Objects box determines the order in which the data will appear in the report. 1. Click an object in the Result Objects box. 2. To change the object's position, drag the icon to the left or or right.*

*54 Desktop\_Intelligence\_Access\_and\_Analysis\_Guide Building Queries on Universes Building a basic query on a universe 3 3. To swap the icon's position with that of another object in the Result Objects box, press Shift while dragging the object icon until it is above the icon of the other object, then release the mouse button. Running the query Once you have built the query you want, you click Run to have the query retrieve the data from the database. Example: to build a query in the Query Panel and run the query You have displayed the Query Panel for the Island Resorts Marketing universe and want to move objects from the Classes and Objects box to the Result Objects box to build your query. 1. Click the + sign next to the Resort class, the Sales class and the Measures class. Doing this reveals the objects in each class. 2. Double-click the objects you want. For example, to find out yearly revenue in each resort, double-click Resort, Year, and, in the Measures class, Revenue.*



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