Web Intelligence Rich Client User's Guide

BusinessObjects Web Intelligence Rich Client XI 3.0

Manual abstract:

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229 Web Intelligence Rich Client User's Guide 9 Contents Table types in Web Intelligence.

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The Web Intelligence software is installed by your administrator on a web server on your corporate network. To use Web Intelligence from your local computer, you log into the business intelligence portal InfoView via your Internet browser. Then, depending on your security profile, you can interact with the reports in corporate documents or edit or build your own documents using a Web Intelligence report panel or query panel. How Web Intelligence performs business intelligence offline Web Intelligence can be used offline as Web Intelligence Rich Client, a standalone Microsoft Windows application, equivalent to the Java Report Panel, that you can install on your computer. Web Intelligence Rich Client lets you continue to work with Web Intelligence (WID) documents when you are unable to connect to a CMS, when you want to perform calculations locally rather than on the server, and when you want to work with Web Intelligence documents without installing a CMS or application server. Web Intelligence Rich Client can also be used when connected to a CMS. Interacting with Web Intelligence reports Depending on your security profile and on how Web Intelligence is deployed across your organization, you can view, analyze, or enhance and modify the data displayed on reports. 12 Web Intelligence Rich Client User's Guide About Web Intelligence Interacting with Web Intelligence reports 1 Viewing and printing Web Intelligence reports Once logged into the business intelligence portal InfoView, you can access Web Intelligence documents and view reports. Onscreen navigation is made easy with page-to-page navigation buttons and a document map that allows you to jump from section to section or report to report. The same document can provide the information adapted to each user due to prompts that request each user, who opens the document, to specify the data they want to return to the reports.

When you print reports, Web Intelligence automatically generates a copy of reports in Portable Document Format (PDF) format for optimum print quality. Drilling on Web Intelligence reports Drilling on Web Intelligence reports enables you to analyze the detailed data behind the displayed results. You can turn the report you are viewing into a drillable report or drill on a duplicate of the original report to retain a version of the results before your drill analysis. Once you have found the information you need, you can save a snapshot of the drilled report to share the results of your analysis with other Web Intelligence users, or save the document in Excel or Portable Document (PDF) format to print or email to other business contacts. Performing on-report analysis Viewing Web Intelligence reports in Interactive view format enables you to enhance reports and fine-tune the data reports contain, to highlight the information that most interests you on demand.

On-Report Analysis is designed for: · · users who need to build queries and then want to build reports report consumers who need to manipulate the reports created by others With On-Report Analysis you can: Web Intelligence Rich Client User's Guide 13 1 About Web Intelligence Creating and editing Web Intelligence documents · · · · · · view document metadata to understand the data behind reports and see how reports are structured and filtered filter and sort results add new tables and charts add formulas and create variables format and change the layout of charts and tables slice and dice results by adding other data to charts and tables Note: On-report analysis of Web Intelligence reports in Interactive view format is only available if your administrator has deployed Web Intelligence in JSP mode. Creating and editing Web Intelligence documents You can create or edit Web Intelligence documents using several tools: · · · · Web Intelligence Query - HTML on page 14 Web Intelligence Java Report Panel on page 15 Web Intelligence Rich Client on page 15 Web Intelligence HTML Report Panel on page 16 Web Intelligence Query - HTML Designed for users requiring a pure HTML environment to build queries, Web Intelligence Query HTML offers the ability to define the data content of documents on multiple data sources. You can use Query HTML to create new documents from scratch or edit the queries in documents created using any of the other Web Intelligence tools. Used together with On-Report Analysis, Query HTML provides a complete solution for building queries and designing powerful reports in a pure HTML environment. Once you have run the queries to generate a standard report, you can leverage Web Intelligence On-Report Analysis features to format multiple reports, add formulas, and create variables.

14 Web Intelligence Rich Client User's Guide About Web Intelligence Creating and editing Web Intelligence documents 1 Note: Web Intelligence Query HTML and On-Report Analysis in Interactive view format are only available, if your administrator has deployed Web Intelligence in JSP mode. Web Intelligence Java Report Panel The Java Report Panel is designed for users who need more flexibility with designing report layout and defining formulas and variables. A graphical Formula Editor enables you to build formulas rapidly using drag-and-drop. Note: The Web Intelligence Java Report Panel is available if your administrator has deployed Web Intelligence in ASP mode and if your administrator has deployed Web Intelligence in JSP mode. Web Intelligence Rich Client Web Intelligence Rich Client is a locally installed Microsoft Windows application that lets you work with Web Intelligence (WID) documents that are stored locally or in a CMS. When working without a CMS connection you can work on your local machine with either CMS-secured or unsecured documents.

Web Intelligence Rich Client is based on the Web Intelligence Java Report Panel and provides equivalent document creation, editing, formatting, printing and saving capabilities. There are a number of reasons for using Web Intelligence Rich Client to work with WID documents: · · You want to work with Web Intelligence documents but you are unable to connect to a CMS (while traveling, for example). You want to improve calculation performance: Web Intelligence Rich Client performs calculations locally, rather than on the server, and local calculations can perform better than server calculations. You want to work with Web Intelligence documents without installing a CMS or application server.

· Web Intelligence Rich Client User's Guide 15 1 About Web Intelligence Creating and editing Web Intelligence documents Web Intelligence HTML Report Panel Designed for users who need to build basic reports, the HTML Report Panel provides query and report features in a simple wizard-like interface. Each document is based on a single data source and can contain multiple reports, displaying different subsets of information. In addition, the HTML Report Panel is 508 compliant and can be customized for specialized deployments. Note: The Web Intelligence HTML Report Panel is only available if your administrator has deployed Web Intelligence in JSP mode. 16 Web Intelligence Rich Client User's Guide Installing Web Intelligence Rich Client 2 2 Installing Web Intelligence Rich Client To install Web Intelligence Rich Client from the BusinessObjects Enterprise CD There are three to install Web Intelligence Rich Client: · · · from the BusinessObjects Enterprise CD from InfoView using silent install To install Web Intelligence Rich Client from the BusinessObjects Enterprise CD · See the Business Objects Enterprise XI 3.1 Installation Guide for full installation instructions. To install Web Intelligence Rich Client from InfoView 1. 2. 3. 4.
Log into InfoView. Click Preferences at the top right of the InfoView screen. Scroll down and click Web Intelligence Preferences. Click Desktop (Web Intelligence Rich Client required) in the Select a default creation/editing tool section. 5.
Click Document List at the top left of the InfoView screen. 6. Click New > Web Intelligence Document or select an existing document to edit. Web Intelligence Rich Client is downloaded to your computer and launched to create the document. Note: If you install Web Intelligence Rich Client from InfoView, the Web Intelligence Rich Client online help system is not installed to your local computer.
If you work in Connected mode, Web Intelligence Rich Client displays help pages stored on the server. If you work in Offline or Standalone mode, help pages are not available. Related Topics · Web Intelligence Rich Client working modes on page 25 18 Web Intelligence Rich Client User's Guide Installing Web Intelligence Rich Client Using silent install for large-scale deployments 2 Using silent install for large-scale deployments Using silent install mode you can perform large-scale deployments of Web Intelligence Rich Client from the command line. You do not see any dialog boxes and you do not need to perform any actions during the install. Every option available in the standard install mode is available in silent install mode. Silent install parameters The following table lists the command line parameters for a silent install. You can set these parameters using the command line or the silent installation file. Note: If you specify the same pararameter on the command line and in the file, the installer uses the command line value. Web Intelligence Rich Client User's Guide 19 2 Installing Web Intelligence Rich Client Using silent install for large-scale deployments Parameter /qn Description Tells the install not to prompt before or after the installation. Note: You must define the CLIENTLANGUAGE parameter as part of the silent install.

If you do not define CLIENTLANGUAGE, the language selection prompt appears even when you specify the /qn parameter. Value /qn /qn+ Tells the install to prompt when installation is complete. Note: You must define the CLIENTLANGUAGE parameter as part of the silent install. If you do not define CLIENTLANGUAGE, the language selection prompt appears at the beginning of the install even when you specify the /qn+ parameter. /qn+ Accept CLIENT LANGUAGE Specifies whether or not the user Accept="Yes" or Accept="No" accepts the license agreement. The language used by the installer. Note: If you do not specify this parameter, the installer prompts you to select a language at the beginning of the installation even when you have selected the /qn or /qn+ parameters. 20 Web Intelligence Rich Client User's Guide Installing Web Intelligence Rich Client Using silent install for large-scale deployments 2 Parameter Description Value CLIENTLANGUAGE="<language_code> List of language codes: · · · · · · · · · · · · COMPA- The name of the company inNY NAME stalling the product. ENABLEL- Specifies if a log file is created OGFILE for the installation. EN=English ZH_CH=Simplefied Chinese ZH_TW=Traditional Chinese DE=German ES=Spanish KO=Korean NL=Dutch JA=Japanese PT=Portugese SV=Swedish RU=Russian FR=French COMPANYNAME="<company_name>" · · ENABLELOGFILE="0" (log file not enabled) ENABLELOGFILE="1" (log file enabled) INThe language packs to install.
ST LP lanALL. .< gaecd> E u g _o e . S LECTED INSTALL.LP.
<language_code>.SELECTED="1" Note: The values of <language_code> are the same as for the CLIENT LANGUAGE parameter. INThe directory where the Web In- INSTALLDIR="<install_directoSTALLDIR telligence Rich Client compory>" nents are installed. Web Intelligence Rich Client User's Guide 21 2 Installing Web Intelligence Rich Client Using silent install for large-scale deployments Parameter PIDKEY USERNAME ADDLOCAL Description The product license key. Value PIDKEY="<license_key>" The user name associated with USERNAME="<user_name>" the license key.
The Web Intelligence Rich Client ADDLOCAL="<feature_list>" features to install. Example of ADDLOCAL: ADDLOCAL="Jre,WebIRichClientRoot,Docs, WebIRichClient.Help,WebIRichClient.WebiOfflineApplication,Designer,BDE,DataAccess,Btrieve,CDO,dBase,FieldDefinitions,FileSystem,NTEventLog,Logs, OLAP,MyCube,SOFA,OLE_DB_Data,SymantecACT,TextDA,Universe,XML,DADataFederator,MySQL_DataAccess,GenericODBC,DANETEZZA,Microsoft, DAIBMDB2,IBM,Redbrick,DAIBMInformix,DAProgressOpenEdge,Oracle,SFORCE,SybaseASE,DASybase,SybaseIQ,NCRTeradata,LanguagePackCostingFeature,LanguagePackCostingFeatureen" Automatically-generated parameters The following silent install parameters are generated automatically.

Do not modify them in the XXX.ini file. 22 Web Intelligence Rich Client User's Guide Installing Web Intelligence Rich Client Using silent install for large-scale deployments 2 Parameter INSTALL SWITCH Privileged ADDSOURCE ADVERTISE REMOVE WDEPLOY_LANGUAGES ApplicationUsers ProductName ALLUSERS Web Intelligence Rich Client User's Guide 23 2 Installing Web Intelligence Rich Client Using silent install for large-scale deployments 24 Web Intelligence Rich Client User's Guide Web Intelligence Rich Client working modes 3 3 Web Intelligence Rich Client working modes Web Intelligence Rich Client Connected mode You can work with Web Intelligence Rich Client in three modes: Connected, Offline, or Standalone. Web Intelligence Rich Client Connected mode In Connected mode, Web Intelligence Rich Client is connected to a CMS. You can work with documents on the CMS or with local secured or unsecured documents. According to your security rights in the CMS, you can do the following: · import documents from the CMS · import universes from the CMS · open local documents · create documents · edit documents · refresh documents · save documents locally · export documents to the CMS Security in Connected mode When you work with Web Intelligence documents in Connected mode, the security rights of your user account are applied by the CMS.

Connecting to the CMS in Connected mode There are two ways of launching Web Intelligence Rich Client, and each connects to the CMS differently: · When you launch from InfoView, Web Intelligence Rich Client connects to the CMS within the same InfoView session, so no login is required. Communication with the CMS goes via HTTP to an application server, which reroutes the calls to the CMS and repository. No local middleware is required. When you launch locally, by logging in to Web Intelligence Rich Client through the Windows Start menu or by double-clicking a Web Intelligence document, Web Intelligence Rich Client connects to the CMS in client-server mode via the OCA/CORBA framework of the Enterprise · 26 Web Intelligence Rich Client User's Guide Web Intelligence Rich Client working modes Web Intelligence Rich Client Offline mode 3 SDK. You need the appropriate database middleware on your local machine. Related Topics To launch Web Intelligence Rich Client in Connected mode locally on page 31 · To launch Web Intelligence Rich Client in Connected mode from InfoView on page 30 · Web Intelligence Rich Client Offline mode In Offline mode, Web Intelligence Rich Client is not connected to a CMS but applies CMS security. You can work with local documents and universes that are secured by the CMS you select at login, or with unsecured local documents and universes. You can do the following: · open local documents · create documents (requires local universe and local connection server) · edit documents · refresh documents (requires local universe and local connection server) · save documents locally In Offline mode, you cannot import documents from or export documents to a CMS. Security in Offline mode When you connect to a CMS in Connected mode, your security rights in that CMS are downloaded to your computer. Each document and universe downloaded from a CMS contains within it an access control list identifying groups and users that have access rights to the document.

In Offline mode, Web Intelligence Rich Client applies CMS security rights by matching the access rights for the document or universe against the locally stored security file. For example, if a document was downloaded from a CMS to your local machine, and you do not have the right to open the document in the CMS from which it was downloaded, you cannot open the document on your local machine. Web Intelligence Rich Client User's Guide 27 3 Web Intelligence Rich Client working modes Web Intelligence Rich Client Standalone mode Note: Before you can work in Offline mode with documents or universes secured by a CMS, you must first have connected to that CMS at least once in Connected mode. This allows Web Intelligence Rich Client to download the CMS security information to your local machine, and to display the CMS as a choice in the System list on the login page. You can then log in in Offline mode and work with no CMS connection because Web Intelligence Rich Client reads the CMS security information in the local file.

Technical notes · · When working in Offline mode, you must have the appropriate universes and database middleware installed on the same machine as Web Intelligence Rich Client to be able to create or refresh documents. If you do not, you can still open, edit, and save documents locally as long as you have the appropriate security rights. The security information for a CMS is stored in a local security information file (extension LSI) in the LocData folder under My Business Objects Documents in the My Documents folder. One computer can store LSI files for several CMSs. Web Intelligence Rich Client Standalone mode In Standalone mode, Web Intelligence Rich Client is not connected to a CMS and no security is enforced.

You can work with local, unsecured documents and universes only. You can do the following: · · · · · open documents create documents edit documents refresh documents save documents locally You cannot import documents from or export documents to a CMS. The middleware required to create and refresh local, unsecured documents with local, unsecured universes must be installed on the computer with Web Intelligence Rich Client. 28 Web Intelligence Rich Client User's Guide Launching Web Intelligence Rich Client 4 4 Launching Web Intelligence Rich Client To launch Web Intelligence Rich Client in Connected mode from InfoView You can launch Web Intelligence Rich Client in any of its three working modes: · · · Connected Offline Standalone You can run multiple instances of Web Intelligent Rich Client simultaneously, in any mode and connected to any available CMS. The CMS connection status and the current Web Intelligence Rich Client working mode are shown in the status bar on the lower right of the screen. Related Topics · Web Intelligence Rich Client working modes on page 25 To launch Web Intelligence Rich Client in Connected mode from InfoView In Connected mode, security is handled by the CMS. You work with reports in Web Intelligence Rich Client as you do with the Java Report Panel. You do not need database middleware on your local machine when you launch in Connected mode from InfoView. 1. Log into InfoView.

2. Click Preferences at the top right of the InfoView screen. 3. On the Preferences page, scroll down and click Web Intelligence Preferences. 4. In the Select a default creation/editing tool section, click Desktop (Web Intelligence Rich Client required).

5. Click OK. 6. At the top left of the screen, click Document List.

7. Open an existing document or click New > Web Intelligence Document to create a new document. Web Intelligence Rich Client is launched on your computer in Connected mode. If it is not yet installed on your computer, it is installed from InfoView. 30 Web Intelligence Rich Client User's Guide Launching Web Intelligence Rich Client To launch Web Intelligence Rich Client in Connected mode locally 4 If Web Intelligence Rich Client was already running on your computer, launching from InfoView opens a new instance of the application.

The document is not opened in the application instance that was already open. Related Topics · Web Intelligence Rich Client working modes on page 25 To launch Web Intelligence Rich Client in Connected mode locally To launch Web Intelligence Rich Client in Connected mode locally, Web Intelligence Rich Client must be installed on your computer. You must have already connected at least once to the CMS you want to work with using Web Intelligence Rich Client via InfoView. You need to have the middleware required to connect to the CMS installed on your computer. In Connected mode, security is handled by the CMS.

You work with reports in Web Intelligence Rich Client as you do with the Java Report Panel. When you launch Web Intelligence Rich Client in Connected mode locally, you have a client-server connection to the CMS. In this case, you can log out and log in again within the same application session by clicking Tools > Login As. 1. Start Web Intelligence Rich Client locally in either of two ways: · Click Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Web Intelligence Rich Client · In Windows Explorer, associate the WID file type with Web Intelligence Rich Client, and then double-click a Web Intelligence (WID) file. The Web Intelligence login page opens. 2. Select a CMS in the System list. An icon shows what kind of connection was used for the last connection with the CMS: · An icon of a desktop computer means Web Intelligence Rich Client last connected to this CMS in client-server mode (local launch from the client computer).

The name of the CMS is the server name. Web Intelligence Rich Client User's Guide 31 4 Launching Web Intelligence Rich Client To launch Web Intelligence Rich Client in Offline mode · An icon of a globe means Web Intelligence Rich Client last connected to this CMS in HTTP mode (connection via InfoView). The name of the CMS is the full name of the connected cluster. 3. Enter a valid user name and password. 4. Select an authentication mode from the list. Do not choose Standalone if you want to work in Connected mode. When you choose Standalone authentication you work in Standalone mode, with no CMS connection. 5.

Make sure the Use in Offline Mode option is not selected. 6. Click Log In. Web Intelligence Rich Client is launched in Connected mode. If Web Intelligence Rich Client was already running on your computer, launching it again opens a new instance of the application.

If you double-clicked a Web Intelligence document, the document will not be opened in the application instance that was already open. Related Topics · Web Intelligence Rich Client working modes on page 25 To launch Web Intelligence Rich Client in Offline mode To launch Web Intelligence Rich Client in Offline mode, Web Intelligence Rich Client must be installed on your computer. You must have already connected at least once to the CMS you want to work with using Web Intelligence Rich Client via InfoView. In Offline mode, Web Intelligence Rich Client uses the locally stored security file of the CMS you want to work with to authenticate documents. You cannot import to or export from the CMS.

To create or refresh documents, you need to have a connection server installed on your computer. 1. Start Web Intelligence Rich Client in Offline mode in either of two ways: · Click Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Web Intelligence Rich Client · In Windows Explorer, associate the WID file type with Web Intelligence Rich Client, and then double-click a Web Intelligence (WID) file. The Web Intelligence login page opens. 32 Web Intelligence Rich Client User's Guide Launching Web Intelligence Rich Client To launch Web Intelligence Rich Client in Standalone mode 4 2. Select a CMS in the System list. 3. Enter a valid user name and password. 4.

Select an authentication mode from the list. Do not choose Standalone if you want to work in Connected mode. When you choose Standalone authentication you work in Standalone mode, with no CMS connection. 5. Select the Offline Mode option. 6. Click Log In. Web Intelligence Rich Client is launched in Offline mode. If Web Intelligence Rich Client was already running on your computer, launching it again opens a new instance of the application. If you double-clicked a Web Intelligence document, the document will not be opened in the application instance that was already open.

Related Topics · · Web Intelligence Rich Client working modes on page 25 Installing Web Intelligence Rich Client on page 17 To launch Web Intelligence Rich Client in Standalone mode To launch Web Intelligence Rich Client in Standalone mode, Web Intelligence Rich Client must be installed on your computer. Any middleware required to work with unsecured documents and universes must be installed on your computer. In Standalone mode, you cannot work with documents or universes that have been secured by a CMS. 1. Start Web Intelligence Rich Client in Standalone mode in either of two ways: · Click Start > Programs > BusinessObjects XI 3.

1 > BusinessObjects Enterprise > Web Intelligence Rich Client · In Windows Explorer, associate the WID file type with Web Intelligence Rich Client, and then double-click a Web Intelligence (WID) file. The Web Intelligence login page opens. 2. Select Standalone in the Authentication list. Web Intelligence Rich Client User's Guide 33 4 Launching Web Intelligence Rich Client To log into Web Intelligence Rich Client as a different user The System, User Name, and Password boxes, as well as the Use in Offline Mode option, are grayed.

3. Click Log In. Web Intelligence Rich Client is launched in Standalone mode. If Web Intelligence Rich Client was already running on your computer, launching it again opens a new instance of the application. If you double-clicked a Web Intelligence document, the document will not be opened in the application instance that was already open. Related Topics · · Installing Web Intelligence Rich Client on page 17 Web Intelligence Rich Client working modes on page 25 To log into Web Intelligence Rich Client as a different user To log into Web Intelligence Rich Client as a different user without exiting the application, you must have launched Web Intelligence Rich Client via the Windows Start menu or by double-clicking a local WID file, and then connected to the CMS in Connected mode.

1. Save any open documents. 2. Click Tools > Login As.

If any documents have not been saved, you are asked if you want to save them. 3. When you are asked if you are sure you want to log out, click Yes. Any open documents are closed. 4. In the User Identification box, enter your login information and click OK. Related Topics · To launch Web Intelligence Rich Client in Connected mode locally on page 31 · Web Intelligence Rich Client working modes on page 25 34 Web Intelligence Rich Client User's Guide To set user preferences in Web Intelligence Rich Client 5 5 To set user preferences in Web Intelligence Rich Client Web Intelligence Rich Client general preferences 1. Click Tools > Options. The Preferences dialog box opens. 2.

Click one of the tabs: · General: to set general preferences · Viewing: to set document viewing preferences · Locale: to set preferences for interface and formatting locales and how to use them · Drilling: to set document drill preferences 3. Set preferences and click OK. The preferences are now applied. They are stored in a file in the LocData folder under the BusinessObjects Enterprise 12.0 installation folder.

Web Intelligence Rich Client general preferences You set general preferences for Web Intelligence Rich Client by clicking Tools > Options and clicking the General tab of the Preferences box. General In the General section, you choose whether to show the welcome wizard each time Web Intelligence Rich Client is started. The welcome wizard lets you select from a list of recently used universes or browse for more data sources to create a new document. Select default universe In this section, you choose whether to select a default universe for new documents. The default universe is pre-selected in the Universe dialog box when you create a new document.

When creating a document, you can use the default universe or select another one. · No default universe means that no universe in the list is pre-selected when you open the Universe dialog box. You must select a universe from the list when creating a document. The other choice shows the name of the default universe, or None if no default universe has been selected. To choose a default universe, click Browse, then browse to and select a universe. · 36 Web Intelligence Rich Client User's Guide To set user preferences in Web Intelligence Rich Client Web Intelligence Rich Client viewing preferences 5 Select default folders In this section, you choose the default folders in which to store user documents, universes, and help files. To change the default locations, click Browse, then browse to and select a folder. Note: If Web Intelligence Rich Client was downloaded and installed from InfoView, help files are not installed locally. However, they are installed on the InfoView server. Contact your company's Business Objects administrator to get the URL of the help files on the server, then enter the URL here for help to be available.

Select Microsoft Excel format In this section you choose the format to use when you save a document in Microsoft Excel format. · · Prioritize easy data processing in the Excel document: the Excel document will be formatted to ensure efficient data processing. Prioritize the format of reports in the Excel document: the Excel document will be formatted to ensure optimum readability. Web Intelligence Rich Client viewing preferences You set general preferences for Web Intelligence Rich Client by clicking Tools > Options and clicking the Viewing tab of the Preferences box. General In this section, you set the unit of measurement for report display: pixel, inch, or centimeter. Grid In this section you set grid options: · · · Show grid: When this is selected, a grid is displayed to help align page elements. Snap to grid: When this is selected, page elements align to the grid to enable accurate repositioning. Grid spacing: This defines the distance between lines on the grid. Web Intelligence Rich Client User's Guide 37 5 To set user preferences in Web Intelligence Rich Client Web Intelligence Rich Client locale preferences Web Intelligence Rich Client locale preferences You set locale preferences for Web Intelligence Rich Client by clicking Tools > Options and clicking the Locale tab of the Preferences box. Locale In this section, you set preferences for interface and formatting locales. A locale is a combination of language and geographical area. · Select interface locale: Select an available locale to set the application interface language. If you change this setting, you must restart Web Intelligence Rich Client for the change to be taken into account. Select formatting locale: Select an available locale to determine locale-specific formatting (for example, date and time formats). If you change this setting, any documents that are open must be closed and reopened for the new formatting locale to be applied.

· When viewing a document In this section, you set how the formatting locale is decided: · Use the document locale to format the data: When this is selected, data is formatted according to the document locale. The document locale can be saved with the document by means of the permanent regional formatting option that you can select when saving. Use my formatting locale to format the data: When this is selected, data is formatted according to your formatting locale preference. This overrides the document locale. · Web Intelligence Rich Client drill preferences You set drill preferences for Web Intelligence Rich Client by clicking Tools > Options and clicking the Drilling tab of the Preferences box.

For each new drill session In this section, you choose how to start a new drill session: 38 Web Intelligence Rich Client User's Guide To set user preferences in Web Intelligence Rich Client To change your password 5 · · Start drill on duplicate report: When you start a new drill session, a duplicate report is opened in the document and you drill on the duplicate. When you end drill mode, both the original report and the drilled report remain in the document. Start drill on existing report: When you start a new drill session, the current report becomes drillable. When you end drill mode, the report displays the drilled values. General drill options · · · Prompt if drill requires additional data: You are prompted when Web Intelligence needs to retrieve additional data to complete the drill, and can decide whether to go ahead. If the amount of data is large, the retrieval can take time and you may decide not to drill. When this option is not selected, Web Intelligence retrieves the additional data without prompting you. Synchronize drill on report blocks: When this is selected, drilled values are shown in all the report blocks in the report.

When it is not selected, drilled values are shown only in the report block selected for the drill. Hide drill toolbar: When this is selected, the drill toolbar that is normally displayed at the top of drilled reports is not shown.

The drill toolbar displays the value on which you drilled. It is only useful if you want to select filters during your drill session. To change your password You can only change your password from Web Intelligence Rich Client if you are in client-server connection mode: you must have launched Web Intelligence Rich Client locally rather than from InfoView. 1. 2. 3. 4. Click Tools > Change Password. Type your current password in the Enter Old Password box. Type your new password in the Enter New Password box.
Type your new password again in the Confirm New Password box. Your password is changed to the new password. Web Intelligence Rich Client User's Guide 39 5 To set user preferences in Web Intelligence Rich Client To change your password 40 Web Intelligence Rich Client User's Guide Working with documents 6 6 Working with documents To create a new document in Web Intelligence Rich Client To create a new document in Web Intelligence Rich Client To create a new document in Web Intelligence Rich Client in Offline mode, you need to have a connection server installed on your computer. 1. Click Document > New. 2. In the New Document dialog box, click Universe and then Next. 3. In the Universe dialog box, select a universe. The query panel opens to let you build your report.
To select a universe in Web Intelligence Rich Client 1. Select a universe in the Available Universes list. A description of the universe appears in the Help on selected universe box. 2. Click OK. The query panel opens, showing the universe's data in the Data tab. You can now use the query panel to build queries in your document. To import documents from the CMS 1. Click Document > Import from CMS. 2.

Locate the files you want to import: · To search in folders, click Folders and select the CMS folder from which to choose one or more documents to import. · To search in categories, click Categories and select the categories in which you want to search. The files that meet the criteria are displayed on the right. 3. To filter the search results, click the Search list and choose a filter: · Search title · Search keyword · Search description 42 Web Intelligence Rich Client User's Guide Working with documents To import documents from the CMS 6 · Search comments 4. In the text box, type the text that you want to search for in the element you selected (title, keyword, description, or comments), then press Enter. Documents in the list that do not match the criteria are removed from the list. 5. Select one or more documents in the list and click Add. 6.
Click Overwrite imported files to have the imported file overwrite the existing version of the file, if any. 7. Click Import. 8. Click Close.
The documents you selected are installed on your disk. If you selected Open documents on retrieval, they will be opened. Any documents that were already open will remain open in addition. To select document instances to import from the CMS When you import documents from the CMS, more than one instance of the same document may be available. In the Import Documents dialog box, you can see the number of instances of a document and import one or more. 1. Click Document > Import from CMS. The Import Documents dialog box opens, in which you can locate the CMS documents you want to import. 2. If a document you want to import has multiple instances, double-click in the Instances column. The Import document instances dialog box opens. Related Topics · To import document instances from the CMS on page 43 To import document instances from the CMS Before you can import document instances from the CMS, you must open the Import Documents dialog box (Document > Import from CMS) and double-click in the Instances column for a report with multiple instances, to open the "Instances" dialog box. Web Intelligence Rich Client User's Guide 43 6 Working with documents To open a document in Web Intelligence Rich Client 1. In the "Instances" dialog box, select one or more document instances from the list. 2.

Click Open on retrieval if you want the document instances to open when they have been imported. 3. Click Import. 4. Click Close. The document instances are imported from the CMS to your computer. To open a document in Web Intelligence Rich Client In Web Intelligence Rich Client, you can open and work with more than one document in the same session. 1. Click Document > Open. 2.
In the Open a document dialog box, select a document. When you are working in Connected mode, you cannot open local CMS-secured documents. You can only open documents on the CMS itself and local, unsecured documents. 3. Click Open.
Related Topics · Web Intelligence Rich Client working modes on page 25 To work with open documents in Web Intelligence Rich Client In Web Intelligence Rich Client, you can have more than one document open in the same session. Open documents are displayed on separate tabs within the document window and appear as a list in the Window menu. · With more than one document open, choose the one you want to display in any of three ways: · Click the Window menu and select a document. · Click the tab corresponding to the document. 44 Web Intelligence Rich Client User's Guide Working with documents To export a document to the CMS 6 · On the top right of the document tab bar, click the Show List icon to display and select the document.
The document is displayed. Other documents remain open in the background. To export a document to the CMS Documents are exported to the CMS in their current state, including all modifications made since they were created or opened. This means that in addition to locally saved documents, you can export a document to the CMS without saving it locally. A newly created document that is exported before being saved will be given the name "Document X", where X is the document creation order in the session. 1. With the document you want to export open, click Document > Export to CMS. 2. In the Export Document dialog box, click the Folders tab, then select the folder in which you want the document to be published. 3.

To associate a category with the document, click the Categories tab and select one or more available categories. 4. Click Export. Once you have started the export, you cannot cancel it. An "Export successful" message appears at the bottom if export was successful. 5. Click Close. The document is exported to the CMS, where it is available in the folder you chose, associated with the categories you chose. To save documents locally You can save Web Intelligence documents locally from Web Intelligence Rich Client in the following formats: · Web Intelligence document format (WID) · Excel · PDF · Comma-separated values (CSV) 1.

Select the document format in the Files of type list in the "Save As" dialog box.

Web Intelligence Rich Client User's Guide 45 6 Working with documents To save documents locally The dialog box displays the options associated with the format. 2. Set the options associated with the file format, then save the document. Note: You cannot save a document if All Files is selected in the Files of type list. To save a document locally as a Web Intelligence document 1.

Click File > Save As > Web Intelligence Document on the main menu. The "Save Document" dialog box appears. 2. Type the document name in the File name box. 3.

Type the document description (optional) and keywords to identify the document (optional) in the Description and Keywords boxes. 4. Set the document options. Option Description Refresh on open The data in the document is automatically refreshed when the document is opened. Permanent reThe current regional settings (locale) for formatting are gional formatting applied no matter what the locale is on the machine where the document is opened. Save for all users The document can be opened by any user in the same user group. Remove document security All security is removed from the document. The document is no longer associated with a CMS and can be opened by any user. To save a document locally as an Excel file 1. Click File > Save As > Excel on the main menu.

The "Save Document" dialog box appears. 46 Web Intelligence Rich Client User's Guide Working with documents To save documents locally 6 2. Select the folder where you want to save the document from the Save in list. 3. Type the name of the Excel file in the File name box. 4. Select the reports to export in the Select reports list. Each selected report appears as a worksheet in the Excel file. Web Intelligence also starts a new Excel worksheet for each 65K of exported data. 5.

Select the export option. Option Description Prioritize da- This option avoids merging multiple Web Intelligence cells ta processing into Excel cells as much as possible to exploit the data processing features of Excel. Prioritize for- This option attemps to match the layout and formatting of matting the Web Intelligence document as closely as possible in the Excel file. As a trade-off, this option does not exploit the data processing features of Excel to the same extent. To save a document locally as a PDF file 1.

Click File > Save As > PDF on the main menu. The "Save Document" dialog box appears. 2. Select the folder where you want to save the document from the Save in list. 3.

Type the name of the PDF file in the File name box. 4. Select the reports to export in the Select reports list. Each selected report appears with its own bookmark in the PDF file. 5. To export the currently-selected report only, select Current report. 6. To export all pages of the currently-selected report, select All pages. 7. To export the currently-selected page of the currently-selected report, select Current page.

8. To export a range of pages from the currently-selected report, select Page(s), then enter the page range in the From and To boxes. Web Intelligence Rich Client User's Guide 47 6 Working with documents To print a document in Web Intelligence Rich Client To save a document locally as a CSV file 1. Click File > Save As > CSV (data only) on the main menu. The "Save Document" dialog box appears. 2. Select the folder where you want to save the document from the Save in list. 3. Type the name of the CSV file in the File name box. 4.

Select the text qualifier from the Text qualifier list. The text qualifier encloses the data in each column in the CSV file. 5. Select the column delimeter from the Column delimeter list. The column delimeter separates the columns in the CSV file.

6. Select the character set from the Charset list, or select Enter a new charset and type the name of the character set. 7. Select Set as default values to set the values you chose for these options as the default values when saving to CSV. To print a document in Web Intelligence Rich Client 1.

Click Document > Print. 2. In the Print dialog box, select a printer. 3. Select your print options. · To print all reports in the document, click All reports. · To print all pages of the current report, click Current Report and then All. · To print only the current page of the current report, click Current Report and then Current Page. · To print specific pages in the current report, click Current Report and then Pages. In the Pages box, enter the pages to print.

For a range of pages, enter the first and last pages separated by a dash. Enter a comma as a separator between pages or page ranges. 4. Select the page size from the Page Size list. 5. Select the size of the top, left, right, and bottom margins in the Margins section. 48 Web Intelligence Rich Client User's Guide Working with documents To send a document by E-mail attachment 6 The unit of measurement for the margins is controlled from the Viewing tab of the Preferences dialog box (Tools > Options.) 6. Select portrait or landscape page orientation in the Orientation section. 7.

Select the number of copies to print in the Copies section. 8. Click OK. To send a document by E-mail attachment To send a document as an email attachment you must an email application installed on your computer. 1.

With a Web Intelligence document open, click Document > Send by E-mail attachment. If several documents are open, the document currently displayed on screen is the one that is sent as an E-mail attachment. 2. Choose the format in which to send the document: · Web Intelligence document (.WID) · As unsecured WID · As PDF · As Excel The email application opens a new E-mail message with the document attached.

The "Subject" line of the E-mail is the name of the document. The document that is attached is saved in the format you selected, including any modifications made since it was created or opened. 3. In the E-mail message, fill in the "To" line, and if desired change the "Subject" line and write a message in the body of the E-mail. 4. Send the E-mail. Web Intelligence Rich Client User's Guide 49 6 Working with documents To send a document by E-mail attachment 50 Web Intelligence Rich Client User's Guide Working with universes in Web Intelligence Rich Client 7 7 Working with universes in Web Intelligence Rich Client Universe security in Web Intelligence Rich Client Universe security in Web Intelligence Rich Client Universe security in Connected mode When you work with Web Intelligence Rich Client in Connected mode, you access CMS universes remotely. The CMS applies the security rights directly, exactly as if you were working with Web Intelligence through InfoView in your browser. In Connected mode, you cannot access local, CMS-secured universes.

You must access the CMS universes remotely.

Universe security in Offline mode To create or refresh a report in Offline mode, you must have first connected to the CMS in Connected mode. When you work in Connected mode with a CMS, a local security information (LSI) file is downloaded to your computer containing your security rights to the resources in the CMS. When you try to create or refresh a report in Offline mode, you can use: · · locally installed universes that are not secured by the CMS locally installed universes which you are authorized to access, as verified by the LSI file You cannot access universes on the CMS remotely, because in Offline mode you are working without a CMS connection. Note that you need to have a Connection Server installed on your computer with Web Intelligence Rich Client in order to create or refresh documents in Offline mode. Universe security in Standalone mode In Standalone mode, you work with no security and no connection to the CMS. You can work with unsecured, locally installed universes only. The middleware required to create and refresh local, unsecured documents with local, unsecured universes must be installed on the computer with Web Intelligence Rich Client. 52 Web Intelligence Rich Client User's Guide Working with universes in Web Intelligence Rich Client To import a universe from the CMS in Web Intelligence Rich Client 7 Related Topics · · Launching Web Intelligence Rich Client on page 29 Web Intelligence Rich Client working modes on page 25 To import a universe from the CMS in Web Intelligence Rich Client You can import a universe from the CMS in Connected mode only. Import is automatic to provide a universe that is required to create or refresh a document. However, you may want to import universes first to be able to then work with them offline.

1. Click Tools > Universes. The list of available universes appears in the Universe dialog box. These include both local and CMS universes. Universes that have already been imported are indicated with a green check mark.

2. Select one or more universes to import. 3. Click Import. The universes you selected are imported from the CMS to your computer, together with their dependencies (derived or core universes).

Related Topics · To launch Web Intelligence Rich Client in Connected mode locally on page 31 · To launch Web Intelligence Rich Client in Connected mode from InfoView on page 30 · Web Intelligence Rich Client working modes on page 25 Web Intelligence Rich Client User's Guide 53 7 Working with universes in Web Intelligence Rich Client To import a universe from the CMS in Web Intelligence Rich Client 54 Web Intelligence Rich Client User's Guide Accessing Web Intelligence from InfoView 8 8 Accessing Web Intelligence from InfoView To log in to InfoView You access Web Intelligence reports and set global Web Intelligence options from InfoView, the corporate business intelligence portal. To log in to InfoView Before you can use InfoView and Web Intelligence you need the following information: · · · · a URL to the InfoView server the InfoView server name and port number your login and password your authentication, which controls the InfoView resources available to you Contact your adminstrator for these details if you do not already know them. Note: By default the InfoView server name and authentification method are not displayed on the InfoView logon page. You need to supply this information only if your administrator has made these options visible. You access Web Intelligence by using your web browser to log into InfoView, the corporate business intelligence portal. Once you are in InfoView, you can analyze and enhance Web Intelligence reports. 1. Launch your web browser. 2. Point your browser to the InfoView bookmark or URL.

The InfoView login page appears. 3. If the System box is blank, type the name of the InfoView server followed by a colon (:), and then type the port number. 4. In the Username box, type your user name. 5. In the Password box, type your password. 6. In the Authentication box, select the authentication provided to you by your administrator. 7.

Click Log On. The InfoView home page appears. 56 Web Intelligence Rich Client User's Guide Accessing Web Intelligence from InfoView To log out of InfoView 8 To log out of InfoView When you finish using InfoView or Web Intelligence you need to log out, instead of simply closing your web browser. Logging out of InfoView ensures that any preferences you modified during your InfoView session are saved. It also lets your administrator track how many users are logged into the system at any given time and thus optimize InfoView and Web Intelligence performance.

· Click Log Out. The login page appears. You are logged out of InfoView Web Intelligence InfoView options Web Intelligence document creation and viewing options You can set your Web Intelligence options to determine how you create, view and interact with documents using Web Intelligence. You create documents using a query editor to build the query to retrieve the document data. After the query returns the data to the document, you can view and interact with the data.

Web Intelligence Rich Client User's Guide 57 8 Accessing Web Intelligence from InfoView Web Intelligence InfoView options Document creation option Description You create documents using the Java Report Panel, a Java applet than launches in your Web browser. The Java Report Panel is a combined query building, report editing and data analysis environment. If you choose Advanced as your document creation option, you also use the Java Report Panel for working with the data returned by the query. The Select a default view format option is not taken into account. The Java Report Panel provides the richest feature set of all Web Intelligence query building, report editing and data analysis environments. Interactive You build queries using Query HTML, an HTML-based query editor. Advanced Desktop You build queries, edit reports and analyze data using Web Intelligence Rich Client, a standalone version of the Java Report Panel that runs outside your web browser. You create documents using the HTML Report Panel, a 508-compliant query-building and report-viewing environment. Web Accessibility 58 Web Intelligence Rich Client User's Guide Accessing Web Intelligence from InfoView Web Intelligence InfoView options 8 You can use the following view formats to view and interact with existing Web Intelligence documents, or documents that you have just created using a query editor: View format Description Use Web (HTML) format when you want to open reports, answer prompts, navigate reports, and/or perform drill analysis. Web Use Interactive format when you want to apply filters, sorts, calculations, modify formatting and data displayed on tables and charts, and/or perform drill analysis.