Building reports using the Web Intelligence HTML Report Panel

Manual abstract:

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 performs business intelligence over the web How Web Intelligence performs business intelligence over the web Web Intelligence provides business users an easy to use interactive and flexible user interface for building and analyzing reports on corporate data over the web, on secured intranets and extranets. 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 Building reports using the Web Intelligence HTML Report Panel 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: Building reports using the Web Intelligence HTML Report Panel 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 15 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. 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. 14 Building reports using the Web Intelligence HTML Report Panel About Web Intelligence Creating and editing Web Intelligence documents 1 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 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 Building reports using the Web Intelligence HTML Report Panel 15 1 About Web Intelligence Creating and editing Web Intelligence documents 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 Building reports using the Web Intelligence HTML Report Panel Accessing Web Intelligence from InfoView 2 2 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. 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.

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 18 Building reports using the Web Intelligence HTML Report Panel Accessing Web Intelligence from InfoView Web Intelligence InfoView options 2 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. 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 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 Building reports using the Web Intelligence HTML Report Panel 19 2 Accessing Web Intelligence from InfoView Web Intelligence InfoView options Document creation option Description 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. Desktop Web Accessibility 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 HTML format when you want to open reports, answer prompts, navigate reports, and/or perform drill analysis. 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. Interactive Use Interactive format if you are using Query HTML to define queries, and you want to format reports based on those queries and add formulas and variables. Interactive view format is only available if your administrator has deployed Web Intelligence in JSP mode.

PDF Use PDF mode when you want to view static reports. HTML 20 Building reports using the Web Intelligence HTML Report Panel Accessing Web Intelligence from InfoView Web Intelligence InfoView options 2 To select the Web Intelligence query editor 1. Click the Preferences button on the InfoView toolbar. 2. ClickWeb Intelligence Preferences to display the Web Intelligence options.

3. Select the query editor beneath Select a default creation/editing tool. 4. Click OK. To select the Web Intelligence view format You can select different view formats for Web Intelligence documents depending on how you want to interact with the information displayed on the reports.

You select your Web Intelligence view options in InfoView. When you modify your view options, the new settings are implemented the next time you open a Web Intelligence document. 1. Click the Preferences button on the InfoView toolbar. 2. Click Web Intelligence Preferences to display the Web Intelligence options. 3. In the Select a view format section, select the view format. To select a default universe for new documents 1. Click Preferences on the Infoview toolbar.

2. ClickWeb Intelligence Preferences to display the Web Intelligence options. 3. Click Browse beneath Select a default universe and browse to the universe you want to select as the default. To set Web Intelligence drill options Drilling on reports lets you look deeper into data to discover the details behind a good or bad summary result displayed on a table, chart, or section. Before you begin a drill session, you can set your drill options in InfoView to specify how reports will change each time you drill. 1. Click Preferences on the Infoview toolbar. Building reports using the Web Intelligence HTML Report Panel 21 2 Accessing Web Intelligence from InfoView Web Intelligence InfoView options 2. Click Web Intelligence Preferences to display the Web Intelligence options. 3. Select the drill options under Drill options and Start drill session. Hide drill toolbar option When you drill on a value displayed on a report, the Drill toolbar appears and displays the value on which you drilled. The value displayed on the toolbar filters the results displayed on the drilled report. For example, if you drill on year 2001, the results displayed on the drilled table are Q1, Q2, Q3, and Q4 for year 2001.

This means that the quarterly values you drilled to are filtered by 2001. Note: If the drilled report includes dimensions from multiple queries, a ToolTip appears when you rest your cursor on the value displayed on the filter. The ToolTip displays the name of the query and the dimension for the value. The Drill toolbar allows you to select alternative values on the same level, in order to filter the results differently. For example, if you use the Drill toolbar illustrated above to select "2002," the results displayed on the drilled table would be Q1, Q2, Q3, and Q4 for year 2002.

You can opt to hide the Drill toolbar when you start drill mode. The Drill toolbar is only useful if you want to select filters during your drill session. Prompt when drill requires additional data option When you drill the results displayed on a Web Intelligence report, you may want to drill to higher- or lower-level information that isn't included in the scope of analysis for the document. When this is the case, Web Intelligence needs to run a new query to retrieve the additional data from the data source. Since queries on large selections of data may take a long time to be completed, you can choose to be prompted with a message every time a new query is necessary. The prompt message asks you whether you want to run the additional query or not. In addition, the prompt lets you apply filters to the extra dimensions you include in the new query. This means you can restrict the size of the query to only the data necessary for your analysis.

You need permission from your administrator to drill out of the scope of analysis during a drill session. 22 Building reports using the Web Intelligence HTML Report Panel Accessing Web Intelligence from InfoView Web Intelligence InfoView options 2 Synchronize drill on report blocks option When you select the Sychronize drill on all report blocks option, the display of all blocks changes to correspond with your drill actions.

For example, if you drill down on a block from year to quarter, and your report also contains a chart showing data by year, the chart display also changes to display data by quarter. If you do not select the option, only the drilled block changes in response to drill actions. Start drill session option The Start drill session option controls how Web Intelligence behaves when you start drill mode. Start drill session on existing report option When you select Start drill session on existing report, the current report becomes drillable when you start drill mode. When you end drill mode, the report displays the drilled values. Start drill session on a duplicate report option When you select Start drill on a duplicate report, Web Intelligence creates a duplicate of the current report when you start drill mode, and you drill on the duplicate. This allows you to compare the results of the original report with the results you discover during your drill analysis. Web Intelligence locale options The locale determines how a Web Intelligence document displays data. It affects, for example, the formatting of numbers and the default sort order. Three locale settings combine to determine how Web Intelligence displays data: Building reports using the Web Intelligence HTML Report Panel 23 2 Accessing Web Intelligence from InfoView Web Intelligence InfoView options Locale Product locale Description The locale in which InfoView displays data by default.

The locale associated with a particular Web Intelligence document. When you save a document, the document locale becomes the current product locale or the preferred viewing locale. You can permanently associate a locale with a document. For more information, see To permanently associate a locale with a document on page 25. The locale in which you choose to view documents Document locale Preferred viewing locale The product locale The product locale is the locale that InfoView uses by default.

You set the product locale in the Infoview General preferences. To set the product locale 1. Click Preferences on the main InfoView toolbar. 2. Click General to display the general options.

3. Select the product locale from the Product locale list. The document locale The document locale is the locale associated with a particular document. By default, the document takes the product locale when you save a document, or the preferred viewing locale if this is different from the product locale and your settings give the preferred viewing locale priority. The document retains this locale until the next time it is saved, when it again takes either the product locale or the preferred viewing locale. 24 Building reports using the Web Intelligence HTML Report Panel Accessing Web Intelligence from InfoView Web Intelligence InfoView options 2 You can permanently associate the current document locale with a document. For more information, see To permanently associate a locale with a document on page 25. The GetContentLocale() Web Intelligence function returns the document locale. To display data using the document locale 1. Click Web Intelligence Preferences to display the Web Intelligence options.

2. Click Use the document locale to format the data beneath When viewing a document. The preferred viewing locale The preferred viewing locale is the locale that you choose to dislay data. The preferred viewing locale overrides the product locale if it is different from the product locale and your settings give the preferred viewing locale priority. To set the preferred viewing locale 1. Click Preferences on the main InfoView toolbar. 2. Click General to display the general options. 3. Select the preferred viewing locale from the Preferred viewing locale list.

4. Click Web Intelligence Preferences to display the Web Intelligence options. 5. If you want data to be formatted using the preferred viewing locale, click Use my Preferred Viewing Locale to format the data beneath When viewing a document. To permanently associate a locale with a document 1.

In Web Intelligence Interactive, select Document > Properties from the menu to display the" Document Properties" dialog box. 2. Select Permanent regional formatting. 3. Save the document.

The current document locale is associated permanently with the document and overrides the product locale and the preferred viewing locale. Building reports using the Web Intelligence HTML Report Panel 25 2 Accessing Web Intelligence from InfoView Web Intelligence InfoView options 26 Building reports using the Web Intelligence HTML Report Panel Creating and editing documents 3 3 Creating and editing documents To create a Web Intelligence document with the HTML Report Panel To create a Web Intelligence document with the HTML Report Panel · Example: To edit a Web Intelligence document with the HTML Report Panel Depending on your security profile, you can edit how results appear on report tables and charts or edit the queries that make up the data definition of documents. 1. Make sure you are logged into InfoView. 2. On the InfoView home page, navigate to the document you want to open. You do this by clicking the folders in My Folders or Public Folders, or by entering a keyword or the title of the document in the Search box on the InfoView home page. 3. Click Modify below the document name. The document opens in the HTML Report Panel, as selected on your Web Intelligence Document Preferences page in InfoView.

For more information on setting the HTML Report panel as your document editor, see To select the Web Intelligence query editor on page 21. 28 Building reports using the Web Intelligence HTML Report Panel Building and editing queries 4 4 Building and editing queries Creating and editing documents Creating and editing documents You create Web Intelligence documents by first selecting a universe in InfoView. Each universe maps to a database containing corporate business information. When you connect to a universe, Web Intelligence automatically launches the document editor selected on the Web Intelligence Document Preferences page in InfoView. After you have selected a universe, you use the objects in the universe to build a query to return data from the database to your Web Intelligence document. To select a universe 1. On the InfoView Home page, click the arrow next to New on the top toolbar. 2. Click Web Intelligence Document. 3.

Click the title of the universe on which you want to create a document. Your selected query editor opens and displays the objects in the universe.

To edit a Web Intelligence document 1. Navigate to the document you want to open on the InfoView home page. 2.
Click Modify below the document name. The document opens in the Web Intelligence document editor you selected in the InfoView preferences. How universe objects map to data Classes and subclasses Objects are grouped into folders called classes. Each class can also contain one or more subclasses. Subclasses contain objects that are a further subcategory of the objects in the upper level of the class.
30 Building reports using the Web Intelligence HTML Report Panel Building and editing queries How universe objects map to data 4 The role of classes is to organize the objects into logical groups. When you create queries on the universe, classes help you to find the objects that represent the information that you want to use in a query. Dimension object A dimension object represents data that provides the basis for analysis in a report. Dimension objects typically retrieve character-type data, for example; customer names, resort names, or dates. Dimension objects appear as follows in the Web Intelligence query panel: Detail object A detail obect provides descriptive data about a dimension. A detail is always attached to the dimension for which it provides additional information. For example, [Age] is a detail object that is associated with the (Customer] dimension. Detail objects appear as follows in the Web Intelligence query panel: Measure object The measure object retrieves numeric data that is the result of calculations on data in the database. For example, [Revenue] is the calculation of the number of items sold multiplied by item price. Measure objects are often located in a Measures class.

Measure objects appear as follows in the Web Intelligence query panel: Building reports using the Web Intelligence HTML Report Panel 31 4 Building and editing queries Building queries There are two types of measure: · classic measures - calculated by Web Intelligence · smart measures - calculated by the database on which the universe is based In certain situations, smart measures impact the way in which Web Intelligence displays calculations. For more information on smart measures, see the Using Functions, Formulas and Calculations in Web Intelligence guide. Building queries To build and run a query in the HTML Report Panel 1. Click the + sign next to a class folder in the Universe Objects pane. The class expands to show the objects that belong to the class. 2. Double-click an object in the Universe Objects pane; or Drag an object from the Universe Objects pane and drop it onto the Result Objects pane; or select an object on the Universe Objects pane, then click >>. 3. Repeat the previous step for every object you want to include in the query. 4.
The next step depends on whether you want to generate a default formatted report immediately to view the results or whether you want to design the document structure now and then generate the results with your personalized formatting. Option Click Run. Description Do this to display the results corresponding to the query definition in a vertical table, containing data for all of the objects included on the query. 32 Building reports using the Web Intelligence HTML Report Panel Building and editing queries Building queries 4 Option Click the Report tab at the top of the HTML Report Panel, specify the structure of the document, and then click Run. Description Do this to select a specific table or chart template for the data or insert additional reports and then allocate a sub-set of the query data to each report.
To add objects to a query in the HTML Report Panel You must be on the Query tab of the HTML Report Panel. 1. Click + next to a class folder or double-click a class folder. 2. Double-click an object in the class you expanded or drag the object to the Result Objects pane or select the object then click >>. To remove objects from a query in the HTML Report Panel You must be on the Query tab of the HTML Report Panel. · Drag the object from the Result Objects pane and drop it onto the Universe Objects pane or select the object then click <<. To set query properties in the HTML Report Panel 1. On the Query tab, click the Expand Properties Zone button. The query properties options appear. 2. Set the properties. Building reports using the Web Intelligence HTML Report Panel 33 4 Building and editing queries Controllling how queries retrieve data Controllling how queries retrieve data Max retrieval time query property Maximum time that a query can run before the query is stopped. This can be useful when a query is taking too long due to an excess of data, or network problems. You can set a time limit so a query can stop within a reasonable time.

Max rows retrieved query property The Max rows retrieved query property determines the maximum number of rows of data that are displayed when a query is run. If you only need a certain amount of data, you can set this value to limit the number of rows of data in your document. Max rows retrieved does not operate at the database level. If you set Max rows retrieved to 1000, and your query returns 5000 rows, Web Intelligence initially retrieves all 5000 rows, before discarding 4000 and retaining only the first 1000 rows. The Sample result set query property also applies a restriction on the number of rows in the query, but at the database level. If you set Max rows retrieved to 2000 and Sample result set to 1000, the query retrieves a maximum of 1000 rows only. This setting can be overridden by the limits set by your administrator in your security profile. For example, if you set the Max rows retrieved setting to 400 rows, but your security profile limits you to 200 rows, only 200 rows of data will be retrieved when you run the query. Retrieve duplicate rows query property In a database, the same data may be repeated over many rows. You can choose to have these repeated rows returned in a query, or to have only unique rows returned.
34 Building reports using the Web Intelligence HTML Report Panel Building and editing queries Setting the scope of analysis 4 Setting the scope of analysis Scope of analysis The scope of analysis for a query is extra data that you can retrieve from the database to give more details on the results returned by each of the objects in a query. This extra data does not appear in the initial result report, but it remains available in the data cube, so you can pull this data in to the report to allow you to access more detail at any time. This process of refining the data to lower levels of detail is called drilling down on an object. In the universe, the scope of analysis corresponds to the hierarchical levels below the object selected for a query. For example, a scope of analysis of one level down for the object Year, would include the object Quarter, which appears immediately under Year.

You can set this level when you build a query. It allows objects lower down the hierarchy to be included in the query, without them appearing in the Results Objects pane. The hierarchies in a universe allow you to choose your scope of analysis, and correspondingly the level of drill available. In the Java Report Panel and in Web Intelligence Rich Client, you can also create a custom scope of analysis by selecting specific dimensions for the Scope of Analysis pane. Note: You cannot set the scope of analysis when working in query drill mode because this drill mode causes Web Intelligence to modify the scope dynamically in response to drill actions.

Levels of scope of analysis You can set the following levels for scope of analysis: Level Description Only the objects that appear in the Results Objects pane are included in the query. None Building reports using the Web Intelligence HTML Report Panel 35 4 Building and editing queries Setting the scope of analysis Level Description For each object in the Results pane, one, two, or three objects lower down the hierarchy tree are included in the query. The data from these objects is stored in the cube until you add them to the document. · · · One level down Two levels down Three levels down Custom All objects added manually to the Note: This option is available in the Scope of Analysis panel are included Java Report Panel and in Web Intelliin the query. gence Rich Client only. Including a scope of analysis in a document increases the document size significantly. This is because the data necessary for the scope you specify is saved with the document, even though it is not visible in the reports unless you start drill mode and drill down to the data to display the corresponding values. In order to minimize the size of documents and optimize performance, we recommend that you only include a scope of analysis in documents where you are certain that users will need to drill. We suggest the following method because it will be easier for you to set the scope of analysis seeing the hierarchy of the classes and objects. To set the scope of analysis in the HTML Report Panel 1.

On the Query tab, click the arrow next to the Scope of Analysis drop-down list box. 2. Select a level for the scope of analysis. 36 Building reports using the Web Intelligence HTML Report Panel Building and editing queries Query contexts 4 Query contexts What is an ambiguous query? An ambiguous query is a query that contains one or more objects that can potentially return two different types of information. In a universe, certain dimensions may have values that are used for two different purposes in the database. For example, the [Country] dimension in the query below can return two types of information: · · Customers and the country in which they spent their vacation. Customers and the country for which they have made their reservation. The role that Country plays in this query is ambiguous. A country can be either the country where a vacation was sold, or a country where a vacation is reserved. One is existing information (sales), and the other is future information (reservations).

To avoid ambiguities in a query, the universe designer identifies the different ways that objects can be used in the universe, and implements restrictions on how these objects can be combined. These restrictions are called contexts. What is a context? A context is a defined group of objects that share a common business purpose. This business purpose is usually the type of information that these related objects represent. For example, a sales context is a grouping of all the objects that can be used to create sales queries.

A reservations context is a grouping of all the objects that can be used in reservation queries. Contexts are defined in a universe by the universe designer. You can combine any object within the same context to create a query. You can also combine objects in different contexts. If you use an object that is common to both contexts, Web Intelligence will try to determine the context that best fits the other objects in the query.

If it cannot determine a context, you are prompted to choose the context that you want to apply to the query. Building reports using the Web Intelligence HTML Report Panel 37 4 Building and editing queries Query contexts To choose a context when you run a query · Click the context in the Select a Context dialog box. Choosing a context when you run a query When you create a query or refresh a report, you may be asked to choose a context before the query can run. Contexts are set up in a universe to avoid ambiguous queries. To choose a context when you run a query · Click the context in the Select a Context dialog box. Reset contexts on refresh query property When selected, you are prompted to choose a context each time a query requiring a context is run. When unselected, Web Intelligence retains the context specified the first time you run the query. To reset contexts on query refresh in the HTML Report Panel 1. On the Query tab, click the Expand Properties Zone button. The query properties options appear.

38 Building reports using the Web Intelligence HTML Report Panel Building and editing queries Using queries 4 2. Select Reset contexts on refresh. Using queries To run a query 1. 2. 3. 4. 5. Select the report objects. Define the scope of analysis Define query filters. Set query properties.

Click Run. To interrupt a query When you interrupt a query, only partial data is returned to the document. The values displayed in the document do not accurately reflect the definition in the query. 1. On the "Waiting - Refresh Data" dialog box, click Cancel.

The "Interrupt Data Retrieval" dialog box appears. 2. Click OK. To remove a query 1. Select a the query you want to remove by right-clicking the appropriate Query tab.

Building reports using the Web Intelligence HTML Report Panel 39 4 Building and editing queries Using queries 2. Click Remove. 40 Building reports using the Web Intelligence HTML Report Panel Table types in Web Intelligence 5 5 Table types in Web Intelligence Vertical table A Web Intelligence report displays results in a block. You can format the block as a specific type of table. Vertical table Vertical tables display header cells at the top of the table and the corresponding data in columns. By default, the header cells display the names of the dimensions, details, and measures included in the table. The body cells display the corresponding values. Horizontal table Horizontal tables display header cells at the left of the table and the corresponding data in rows. By default, the header cells display the names of the dimensions, details, and measures included in the table. The body cells display the corresponding values.

42 Building reports using the Web Intelligence HTML Report Panel Table types in Web Intelligence Crosstab 5 Crosstab Crosstabs display values for dimensions across the top axis and on the left axis.

The body displays the values of a measure that correspond to the cross-section of the dimensions. For example, this crosstab displays values for [Quarter] across the top axis and displays values for [State] on the left axis. The body displays values that [Sales Revenue] for each quarter in each state. You can include multiple dimensions in crosstabs. For example, this crosstab displays two dimensions. The values for the [Sales Revenue] measure are values each state by quarter for each line. When you create crosstabs that include a dimension(s) in the body, the body cell values are calculated according to a multi-dimensional data model. The values displayed in the body are calculated according to all of the coordinates on the table axes, whether or not there is a row for the specific coordinate in the SQL result. Building reports using the Web Intelligence HTML Report Panel 43 5 Table types in Web Intelligence Forms Forms Forms are useful in your report if you want to display detailed information per customer, product, or partner.

For example, a form is a useful way of displaying individual customer records with information such as the customer account, name, address, and so on. Forms are also useful for formatting address labels for envelopes. 44 Building reports using the Web Intelligence HTML Report Panel Allocating data to tables 6 6 Allocating data to tables To select a table or chart template By default, when you define the query for a new document, Web Intelligence displays the results on a new report in a vertical table. You can select a different table or chart template before you run a new query to view the results. You can also modify an existing report by applying a different table or chart template.

To select a table or chart template 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@2. In the Report Definition pane, click the drop-down arrow next to the list box.

The available templates are listed. 3. Select the template you want. If you select a chart, a second list box opens with each chart sub-type related to the chart type you chose in the original list box. Click the chart sub-type you want to display in the report. 4. Click Apply. Depending on the template you selected, one or more fields appear in the Report Definition pane. If you select a..

. horizontal table vertical table crosstab form 2D chart 3D chart the following field(s) appear... columns rows columns, rows, and a body rows X-axis, Y-axis X-axis, Y-axis, and optionally a ZAxis 46 Building reports using the Web Intelligence HTML Report Panel Allocating data to tables To add an object to a table 6 If you select a... pie chart radar chart the following field(s) appear...

X-axis, Y-axis X-axis, Y-axis, and optionally a ZAxis Once you have selected a template, you need to allocate each object to he rows and columns of a table or to the different axes of a chart. To add an object to a table 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@@@The objects included in the document are listed in the Result Objects pane.

The selected report may contain some or all of the objects in the document. 2. Leave the displayed report selected, or Select a different report by clicking the arrow next to the Current report drop-down list box, and then select a different report from the list. 3. Drag an object from the Result Objects pane and drop the object onto the Column, Row, Body, or Section of your choice, or click the radio button at the top of a Column, Row, or Body pane, and then in the Result Objects pane either double-click the object you want to add or click the >> button.

The object appears in the selected area on the table 4. Building reports using the Web Intelligence HTML Report Panel 47 6 Allocating data to tables To remove an object from a table To remove an object from a table 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@@@The objects included in the document are listed in the Result Objects pane. The selected report may contain some or all of the objects in the document. 2. @@The objects included in the table appear positioned in the different areas of the report. 3. Drag an object from the Column, Row, or Body pane you want to modify, and then drop the object onto the Result Objects pane, or click the radio button at the top of a Column, Row, or Body pane, and then in the Result Objects pane either click the << button or Delete.

The object is removed from the table. 4. To reposition an object on a table 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@@@2. 48 Building reports using the Web Intelligence HTML Report Panel Allocating data to tables To reorder the columns or rows on a table 6 The objects included in the report appear in the different areas of the table. 3. Drag an object from the Column, Row, or Body pane you want to move it from, and then drop the object onto the Column, Row, or Body pane where you want to move it. 4.

To reorder the columns or rows on a table 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@@@2. @@The objects included in the report appear in the different areas of the table.

3. In a Column, Row, or Body pane, drag the object you want to move above or below another object in the pane, or click the radio button next to the Column, Row, or Body pane that contains the objects you want to reorder. 4. Click the object you want to move, then click an arrow located to the right of the selected pane. If an a.

.. you want to move an object... to a column before another object, vertical table to a column after anoththe Move Right arrow. er object, then click... the Move Left arrow.

Building reports using the Web Intelligence HTML Report Panel 49 6 Allocating data to tables To reorder the columns or rows on a table If an a... you want to move an object... then click... to a row above another the Move Up arrow.

object, horizontal table to a row below another the Move Down arrow. object, to a column before another object, the Move Up arrow. to a column after anoththe Move Down arrow er object, to a row above another the Move Left arrow. object, crosstab to a row below another the Move Right arrow. object, in the body before anoththe Move Left arrow.

er object, in the body after another the Move Right arrow. object, The objects appear in the new order. 5. 50 Building reports using the Web Intelligence HTML Report Panel Chart types in Web Intelligence 7 7 Chart types in Web Intelligence Bar charts A Web Intelligence report displays results in a block.

You can format the block as a specific type of chart.

Bar charts Bar charts display data in bar form, either vertically or horizontally. Bar charts are useful if you want to compare similar groups of data; for example one time period to another. There are five types of bar charts: grouped, bar and line, stacked, percent, and 3D. 2D bar charts include the optional Z-Axis. Including data on the Z-Axis enables you to show an additional break down of the results displayed on the chart bars. 3D bar charts do not include an axis legend. You can clearly see what information is displayed on the chart bars by looking at the axis labels. Line charts Line charts connect specific data values with lines, either horizontally or vertically. Line charts are useful if you want to show trends or changes in data over time. There are five types of line charts: mixed, stacked, percent, 3D, and 3D surface.

Area charts Area charts are line charts in which the area between the lines and axis are filled in. Area charts are useful if you want to emphasize the size of the total data in a report, as opposed to the changes in the data. You may not want 52 Building reports using the Web Intelligence HTML Report Panel Chart types in Web Intelligence Pie charts 7 to use an area chart if you have a sharp contrast between specific data points. Use a line chart instead. You can use more than one measure object on the Y-axis as long as the measures are of the same type and scale; for example, Number of Guests, and Future Guests. There are five types of area charts: absolute, stacked, percent, 3D area, and 3D surface. Pie charts Pie charts display data as segments of a whole. Pie charts are useful if you want to show how each part of your report data contributes to the total. Pie charts have a single axis displayed on the body of the pie. This is the Y-Axis.

Each segment of the pie chart displays a value for the measure on the Y-Axis. The pie chart legend indicates the dimension on the X-Axis. You can only include one measure object in a pie chart. If you have several measures in your report, you should choose another chart type. There are four types of pie charts: pie, 3D pie, ring, 3D ring.

Radar, polar and scatter charts In radar charts, the X- and Y-axis connect at the chart's center. Radar charts are useful if you want to look at several different factors related to one item. For example, you could use a radar chart to display revenue data for different services within a hotel. On one axis, you could display revenue for the rooms. On another you could display revenue for the restaurant, and so on.

Building reports using the Web Intelligence HTML Report Panel 53 7 Chart types in Web Intelligence 3D charts Scatter charts are similar to line graphs, except that the data points are plotted without a line connecting them. Scatter charts are useful if you want to make a comparison between specific data points. There are four types of radar, polar, and scatter charts: radar line, stacked radar, polar, and scatter. 3D charts 3D charts include three axes: the Y-Axis always displays values for measures (such as sales totals, margins, quantities and so on); the X- and Z-Axis display values for dimensions (that is, key indicators, such as time, geography, service lines, and so on). In the 3d bar chart displayed below, the chart bars display sales revenue per quarter, per year. The [Sales revenue] measure is on the Y-Axis, the [Quarter] dimension is on the X-Axis, and the [Year] dimension is on the Z-Axis To see how this data is displayed in a 2D bar chart, see 2D charts on page 55. 54 Building reports using the Web Intelligence HTML Report Panel Chart types in Web Intelligence 2D charts 7 2D charts The 2D bar chart below includes an optional Z-Axis with the values for quarter. Including data on the Z-Axis enables you to show an additional break down of the results displayed on the chart bars. The [Sales revenue] measure is on the Y-Axis, the [Year] dimension is on the X-Axis, and the [Quarter] dimension is on the Z-Axis. Notice that because the Z-Axis cannot be represented graphically on a 2D chart, the legend provides the information for the Z-Axis values.

To see the same data displayed in a 3D bar chart, see 3D charts on page 54. Building reports using the Web Intelligence HTML Report Panel 55 7 Chart types in Web Intelligence 2D charts 56 Building reports using the Web Intelligence HTML Report Panel Allocating data to charts 8 8 Allocating data to charts To add objects to chart axes Charts can have two or three axes. To add data to charts, you allocate dimension and measure objects to the axes. Measure objects are always plotted on the Y-axis, while dimension and detail objects can be plotted on the X- or Z-axis You can allocate dimensions, details, or measures to the chart axes. To add objects to chart axes 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@2. @@The objects included in the document appear in the Result Objects pane. 3.

Drag an object from the Result Objects pane and drop the object onto the axis of your choice, or click the radio button at the top of the axis pane where you want to insert the object, and then in the Result Objects pane either double-click the object you want to add or select an object and then click the >> button. The object appears in the appropriate axis pane. 4. To remove an object from a chart axis 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab.

A document can contain multiple reports. @@2. @@The objects included in your chart appear on the axis. 58 Building reports using the Web Intelligence HTML Report Panel Allocating data to charts To reposition objects on a chart axis 8 3. Drag the object you want to remove from one of the chart axes and drop the object onto the Result Objects pane, or click the radio button at the top of the axis from which you want to remove the object, and then either press the Delete key or click the << button.

The object no longer appears on the axis. 4. To reposition objects on a chart axis 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@2. @@The objects included in the chart appear on each chart axis. 3. On one of the chart axis, select the object you want to move, then drag the selected object above or below the other object(s) on the axis; or select the radio button next to the chart axis that contains the object you want to move, then select the object and then click the Move up or Move down arrow located at the right of the Axis pane to move the selected object above or below the other object(s) on the axis. Building reports using the Web Intelligence HTML Report Panel 59 8 Allocating data to charts To reposition objects on a chart axis 60 Building reports using the Web Intelligence HTML Report Panel Grouping information with sections 9 9 Grouping information with sections To create a section on a report Sections allow you to split report information into smaller, more comprehensible parts.

Example: Grouping quarterly revenue results into sections on a report You are the regional sales manager in Texas. You receive a report showing 2003 annual revenue for stores in your region, broken down by cities and quarters. City Austin Austin Austin Austin Dallas Dallas Dallas Dallas Houston Houston Houston Houston Quarter Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Sales revenue 314430 273608 294798 252644 215874 194689 204066 188791 572177 619924 533765 520332 To make a comparison of the results for each city per quarter, you set [Quarter] as a section value. The report is broken up into four separate sections by quarter. Q1 62 Building reports using the Web Intelligence HTML Report Panel Grouping information with sections To create a section on a report 9 City Austin Dallas Houston Sales revenue 314430 215874 572177 Q2 City Austin Dallas Houston Sales revenue 273608 194689 619924 Q3 City Austin Dallas Houston Sales revenue 294798 204066 533765 Q4 City Austin Dallas Houston Sales revenue 252644 188791 520332 Building reports using the Web Intelligence HTML Report Panel 63 9 Grouping information with sections To create a section on a report You can create a single section or include multiple sections with subsections in a report. You can also remove and reposition sections within a report. You can create a section from one of two sources: · · on a dimension already displayed on a table or chart on a dimension included in the document but not displayed on a table or chart You cannot create a section with a measure object. To create a section on a report 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports.

@@2. @@The objects included in the document appear in the Result Objects pane. 3. Drag the object on which you want to create a section onto the Sections pane, or click the radio button next to Sections, then select the object on which you want to create the section, and then finally either double-click the object or click the >> button. The object appears in the Sections pane.

4. @@Web Intelligence displays the results organized into the sections you specified, and each section cell displays one of the values returned by the object you selected for the section. To create a subsection on a report You can add subsections within sections in a Web Intelligence report. When you create a subsection, it sub-divides the information below the existing section. 64 Building reports using the Web Intelligence HTML Report Panel Grouping information with sections To remove a section from a report 9 1.

Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@2. @@The objects included in your query appear in the Result Objects pane. Any dimensions or details that you have set as sections appear in the Sections pane. 3. Drag the object on which you want to create a subsection onto the Sections pane and drop the object to the right of the existing section; or click the radio button next to Sections, then select the object on which you want to create the subsection, and then finally either double-click the object or click the >> button. The object appears to the right of any existing sections in the Sections pane. 4. @@The report displays organized in sections and subsections as you specified.

To remove a section from a report You can remove any section you have previously added to your report. When you remove a section, the report data that was split out according to the different values for the section is regrouped into a single table or chart. For example, if you remove a section on [Year] the modified report will display the data for all years in a single table or chart. 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports. @@2. Building reports using the Web Intelligence HTML Report Panel 65 9 Grouping information with sections To change the order of sections on a report The objects included in your query appear in the Result Objects pane. Any dimensions or details that you have set as sections appear in the Sections box of the Report Definition pane. 3.

Drag the object you want to remove from the Sections pane and drop the object onto the Result Objects pane; or click the radio button next to the Sections pane, then select the dimension or detail you want to remove from the Sections pane, and then either press Delete or click the << button. The dimension or detail no longer appears in the Report Definition pane. 4. @@Web Intelligence displays the results without the sections you removed. To change the order of sections on a report You can change the order in which sections appear on a report.

When you view report results in InfoView, subsections appear below the section(s) they detail. When you edit a report using the HTML Report Panel, however, subsections appear to the right of the sections they detail. 1. Make sure you are in Edit mode, with the HTML Report Panel open, and verify you are on the Report tab. A document can contain multiple reports.

@@2. @@The dimensions or details set as sections appear in the Sections pane. From left to right: the highest-level section is the first section on the Sections pane; the lowest-level section is the last section on the Sections pane. 3. In the Sections pane, drag the object you want to move to the left or right of another section; or click the radio button next to the Sections pane, then select dimension or detail you want to move, and then either click the Move Up arrow or the Move Down arrow to the right of the Sections pane. 66 Building reports using the Web Intelligence HTML Report Panel Grouping information with sections To change the order of sections on a report 9 4. @@Web Intelligence displays the results with the sections reordered, as you specified. Building reports using the Web Intelligence HTML Report Panel 67 9 Grouping information with sections To change the order of sections on a report 68 Building reports using the Web Intelligence HTML Report Panel Multi-report documents 10 10 Multi-report documents To insert a report Documents can contain one or multiple reports. This means you can display different sub-sets of document information on different report tabs. Example: A multi-report document with global sales results, regional results, and individual store records In this example, you are a sales analyst at the eFashion store.

You want to distribute global and regional results to all sales managers and also provide them with store manager and address details for each store. You create a document with three reports: · · · a summary report with global sales results displayed on a chart a regional report divided into sections by region showing sales results, sum, and averages per region on a table a third report with store details presented on a form per store When you view the document in InfoView, the report tabs appear at the bottom of your browser window.