




## WebIntelligence XI 3.1: Report Reader Quick Guide

<b>Log In</b>	<ul style="list-style-type: none"> <li>• Open Internet Explorer and go to <a href="http://www.usnhgateway.org">http://www.usnhgateway.org</a></li> <li>• Click <a href="#">Access USNH Enterprise VPN Here</a> and log in to the VPN. Once logged in, you will return to the Gateway.</li> <li>• Click the "Gateway Quick Links" menu and choose <b>Access WebIntelligence</b></li> <li>• In the <b>User Name</b> box, enter your username in either upper or lower case</li> <li>• In the <b>Password</b> box, enter your password and click <b>OK</b>. Passwords are case-sensitive.</li> </ul>
<b>Navigation Bar</b>	<p>You can access the top navigation bar from any WebI page:</p> 
<b>Document List</b>	<p>From the top navigation bar, select <b>Document List</b> to access Public Folders (Corporate Reports), My Favorites (Personal Reports), and Inbox. Corporate reports are organized in Public Folders (previously organized in categories). Users may create folders in My Favorites to organize Personal reports. The folders, subfolders, and reports you can view depend on your account security.</p>
<b>Preferences</b>	<p>From the top navigation bar, select <b>Preferences</b> to change your start page, views, and other preferences.</p> <p>Recommended settings:</p> <p><b>General</b></p> <ul style="list-style-type: none"> <li>○ Document Navigation View: choose <b>Folders</b></li> <li>○ Document List Display: uncheck all selections</li> </ul> <p><b>Change Password</b></p> <ul style="list-style-type: none"> <li>○ To comply with the System Access Control Policy, use a strong password with a minimum of 7 characters. You may not repeat the last 3 passwords used and at least 5 min is needed between password change attempts.</li> </ul> <p><b>Web Intelligence</b></p> <ul style="list-style-type: none"> <li>○ Select a default view format, choose <b>Web</b></li> </ul> <p><b>Desktop Intelligence</b></p> <ul style="list-style-type: none"> <li>○ Select a default view format, choose <b>Web</b></li> </ul> <p>To save changes, click <b>OK</b></p>
<b>Open a Report</b>	<p>Double-click a report name to open. Corporate reports are generally shells containing no data, so it is normal for the report to be empty when opened.</p> <p><i>To view a report description before opening, choose the <b>Open</b> menu and choose <b>Encyclopedia</b>, then click the report.</i></p>
<b>Refresh a Report</b>	<p>If the User Prompt Input pane is not visible on the left, click the <b>User Prompt Input</b> button in the lower left to open it. If you know the response formats needed, type responses and tab between prompts. Select <b>Run</b> to run the report (may appear grayed out but will launch the query).</p>  <p>If you are unsure of response formats needed, in the User Prompt Input pane, click <b>Advanced</b> to choose from a list of values (most reports have value lists), or click the <b>Refresh Data</b> icon in the top right corner. The Prompts dialog box appears. After making selection(s) for each prompt, double-click or use right arrow to move selections from left to right. A green checkmark appears beside completed prompts. Select <b>Run Query</b> to run the report. (You may need to scroll down to see Run Query button).</p> <p><i>Tip: The search feature allows you to narrow a long list of values (Example: UC* for orgs or KIN* for majors). The * (asterisk) is the wildcard. Click <b>Refresh Values</b> to restore the complete list after searching.</i></p>
<b>Close a Report</b>	<p>Click the <b>Close</b> icon at the top right corner of the screen to close a document:</p> 

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<b>Save Reports to My Favorites</b>	<p><i>If you cannot see the Document drop-down list, click <b>View in HTML Mode</b> to view Document &amp; View drop-down lists</i></p> <ul style="list-style-type: none"> <li>• With the report open, choose <b>Save as</b> from the <b>Document</b> drop-down list. To save with data, refresh first.</li> <li>• Edit the name or description if needed, and click <b>OK</b>. It is now available in the selected My Favorites folder.</li> </ul>
<b>Save Reports as Excel, PDF or CSV file</b>	<ul style="list-style-type: none"> <li>• Open and refresh a document</li> <li>• Hold the <b>CTRL</b> key during all of the following steps so a popup blocker does not stop the save process</li> <li>• From the Document menu, select <b>Save to my computer as</b> to save a whole report, or <b>Save report to my computer as</b> to save one report tab only. Then, choose a file type.</li> <li>• Choose <b>Save</b> or <b>Open</b> from the file download box</li> </ul>
<b>Create a My Favorites Folder</b>	<ul style="list-style-type: none"> <li>• Highlight <b>My Favorites</b> and right-click</li> <li>• Select <b>New</b> and then <b>Folder</b>. Enter the new folder name and click <b>OK</b> to save</li> </ul>
<b>Create Report Shortcuts</b>	<p>You may want to save shortcuts for frequently-used reports to a My Favorites folder. Shortcuts are pointers to the original document, so any changes to the original report are reflected.</p> <p>To save a report as a shortcut:</p> <ul style="list-style-type: none"> <li>• Highlight the report and right-click it. Choose <b>Organize</b>, and then <b>Create Shortcut</b></li> <li>• Highlight a My Favorites folder on the left and right-click it. Choose <b>Organize</b>, and then <b>Paste Shortcut</b></li> </ul>
<b>Send Reports to Other Users</b>	<p><i>IMPORTANT: To send a report with data, you must save it to My Favorites before following the steps below</i></p> <ul style="list-style-type: none"> <li>• Open a report, choose <b>Send To</b> from the top navigation bar and choose <b>Business Objects Inbox</b></li> <li>• <i>Uncheck</i> the box next to <b>Use Default Settings</b></li> <li>• Under the <b>Available</b> box, highlight user(s) to send to and use the right arrow to move them to <b>Selected</b></li> <li>• Leave defaults for other choices, and click <b>Submit</b> to send</li> </ul>
<b>Search</b>	<p>To search for a report, enter part or all of the name in the <b>Search Title</b> box and click the magnifying glass icon</p>
<b>Print Reports</b>	<p>PDF is the best view for printing. First, select <b>PDF Mode</b> from the View drop-down list, then click the Print icon on the Adobe toolbar, to print all report tabs.</p> <p><u>If you do not want to print all report tabs</u>, do one of the following:</p> <ol style="list-style-type: none"> <li>1) In the Print dialog box Print Range section, change to "Pages" and specify a range of pages to print (you can determine which to include by navigating around the report using bookmarks on the left)</li> <li>2) While on the report tab you want to print, hold the <b>CTRL</b> key (to bypass popup blocker activity), choose the <b>Document</b> menu, choose <b>Save report to my computer as &gt; PDF</b>. Keep holding <b>CTRL</b> key and click <b>Open</b> in the dialog box to open the current tab in a new Acrobat instance for printing.</li> <li>3) If in PDF view, click the <b>View in HTML format</b> button, click the <b>View</b> menu, and choose <b>Draft mode</b>. Select report text by clicking <b>CTRL + A</b> to Select all and then click <b>CTRL + C</b> to copy. Then open a program like Excel and click <b>CTRL + V</b> to paste. This option is best for tabs that are not too long.</li> </ol>
<b>Delete a Report or Folder</b>	<ul style="list-style-type: none"> <li>• Highlight the folder or report you want to delete, then right-click it</li> <li>• Choose <b>Organize</b>, and then <b>Delete</b>. Click <b>OK</b> to confirm or <b>Cancel</b> to close without deleting.</li> <li>• You can only delete folders &amp; reports in My Favorites or Inbox.</li> </ul>
<b>Inbox</b>	<p>From Document List, click <b>Inbox</b> to access reports sent by other users. If you do not see a report you expect, click <b>Refresh</b>.</p>
<b>Log Out</b>	<p>Click <b>Logout</b> from the top navigation bar when you have completed your session</p>

*For assistance, call 862-4242 or email [web.intelligence.help@unh.edu](mailto:web.intelligence.help@unh.edu)*