SAP

Webi: Accessing Documents

Objective:

To be able to access Web Intelligence (Webi) and run reports

What is Web Intelligence BOXI 4.1?

* A Web-based management-reporting tool developed by BusinessObjects and accessed via a browser.
* A read only reporting tool providing extensive USNH administrative data such as Banner Finance and HR data.
* A tool that allows you to share documents with other Web Intelligence users.

- We access WebI through the same VPN we access Banner.

- A snapshot is taken of Banner (BPRD) at the end of business daily. This information is then available through the reports developed by USNH, which can be found in the public folders. Data for the current posting period continues to be updated until the posting period has closed at which time the figures will no longer change. Comparative data is always as of the end of the posting period regardless of when the report is run.

Web Intelligence Terms:

Document – a file containing data returned by a query and document formatting: interchangeable with Report

Inbox – the area where documents sent by other Web I users are received and stored

My Favorites – the area in WebI where you can save documents

Public Folders – the area where published (corporate) documents are accessed

Query – an inquiry put to the database to retrieve specified data. Users specify criteria for the data that returns; however, WebI will limit the number of rows and amount of time allowed for a query, in case a user inadvertently requests a large volume of data.

Refresh – a command asking the database to retrieve up-to-date report data or list of documents

Repository - a library of published documents

Universe – a complete set of data/data operations, consisting of classes and objects. Objects map to data in the database, permitting queries on the universe. A universe example is USNH\_HR.

VPN – Virtual Private Network, a utility creating a secure tunnel between a computer and the web

* For help with your username or password email [web.intellgence.security@unh.edu](mailto:web.intellgence.security@unh.edu) or call the CIS Help Desk at 603-862-4242.
* You have three chances to enter correct login information.
* Do not share your login information with anyone.
* 3 strikes – then you will be locked out of your account and you will need to contact the CIS Help Desk at 603-862-4242
* If someone needs an account they should let their supervisor know and the supervisor can contact the Business Office

Accessing Web Intelligence:

Step One:

* Login to the VPN
* http://www.keene.edu/office/itg/get-connected/connecting-to-the-network/vpn-remote/

Step Two:

* Login to Web Intelligence
* <https://boxi.unh.edu/BOE/BI>

The Home page may be your default start page. From the Home page, you can:

* Access recently viewed documents and recently run documents
* Access your Inbox, which contains reports WebI users have sent you. You can refresh, send, save, or delete Inbox documents.
* Modify user preferences
* Get help

Links to other locations on the Home Page:

* Document Tab – main folder containing public (corporate) and personal documents. In Public folders and subfolders, WebI users may access documents to retrieve data based on queries specific to their approved access, but cannot modify or delete reports.

Document Tab:

Let’s you also see the Home Tab which brings you back to Home page in WebI

Also:

* Under “My Documents” you can access My Favorites and your Inbox
* Folders bar at bottom left of screen to display “Public Folders”
* Search bar at bottom not in use at this time
* Most icons grayed out until a report is selected
* Log Off – ends your WebI session and returns you to the Log in screen.
* Preferences allows you to customize your settings. There are recommended settings you can customize:
* General: Set document viewing location (near bottom) to “In the BI launch pad portal as tabs”
* General: Set max number of items per page: set to 30
* Web Intelligence: View> Set to HTML
* Web Intelligence: Drill Options>Start drill session: Set to “On existing report”
* Note: Preferences are not active for BI Work Spaces & Crystal Reports (and give errors)
* Note: Log out to apply all the saved settings.

Documents Tab Toolbar is displayed when viewing the Document List. When a report is highlighted, features become available.

* Document List –left side displays a tree view and on the right displays Title of folders within. Clicking a folder displays its contents. Clicking the plus sign (+) next to a folder or double-clicking a folder expands folder contents and shows subfolders or individual documents.
* About – displays when hovering over a report and contains vendor SAP BusinessObjects information.
* Organize – allows you to cut or copy a selected document
* Send –When a report is highlighted, this becomes available and allows you to send a report to another WebI Reader’s Inbox; it is grayed out until a report is selected.
* Select report, click “send”, choose a user from the list and use “>” to move their name to “Selected Receipts” box on right
* Using down arrow next to search box by binoculars you can choose “find full name” to search by name. (Click on “User List” on the right to refresh all the names before searching again)
* Details – displays document info on the right side of the screen
* (arrows with page(s)) allows you to navigate between pages in the Document List

The Open Document Toolbar is displayed when viewing a document. From here, you can perform the following:

* Web Intelligence drop down –lets you customize the tabs and status bar at the bottom of the page and the side panel.
* Paper icon is for report creators who customize structure of reports.
* Folder icon – open a different report
* Disc icon to save reports to favorites
* Printer icon automatically puts report into pdf format and brings it to printer
* Binoculars – Opens a search bar at the bottom of the page to find specific data on the report.
* Document with arrow icon -- allows you to export the whole document (export document as) or a single tab (current report) to PDF or Excel.
* Undo, redo, and refresh gray out when not available.
* X up on tab by home and document tabs– Will close a report. If the report contains data, a dialog box appears asking for confirmation to close: it is fine to click OK.
* To close WebI use “Log off” in upper right.

Working with Documents

1. Click a folder such as “Finance Reports”. Use +/- signs to expand/collapse the view of its subfolders. Note you will only see folders with documents you have the security to access.
2. Double-click a report to open. Public folder reports are published as shells containing no data, so it is normal for these to be empty before entering parameters.
3. Use “?” icon on the side to open User Prompt Input. Enter parameters here or click on “Advanced” to enter them.
4. Flow chart icon on the side opens alternate navigation tool – more effective on certain reports
5. Technical details of the reports can be found using remaining two side icons
6. Tab navigation option at the bottom left (next to the puzzle piece)
7. Page navigation at the bottom of the screen
8. To pin a report look for the pushpin icon on the report tab. Once pinned, this report tab will remain where it is next time you open Webi. So if you run the same few reports, pinning them saves time. To unpin click pushpin again.
9. Freeze rows & columns so headings stay in place as you navigate the report. Freeze only works on tabs formatted like an “Excel tab”
10. Click on “Advanced” in User Prompt Input section on left. Can enter a saved list of prompt variants using the “Available prompt variants” at the top of the dialogue box.