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WebIntelligence 4.0 Rich Client: Tips and Tricks From The Master

Michael Ward

Presentation Objectives

- Reporting From Universes
  - Same Universe
  - A different Universe
- Reporting From Excel Files
  - "Fixing" data issues
- Importing/Exporting Documents From BI Launchpad
- Merging Dimensions
- Merging Dimensions Guidelines
- Tips & Tricks Using Rich Client

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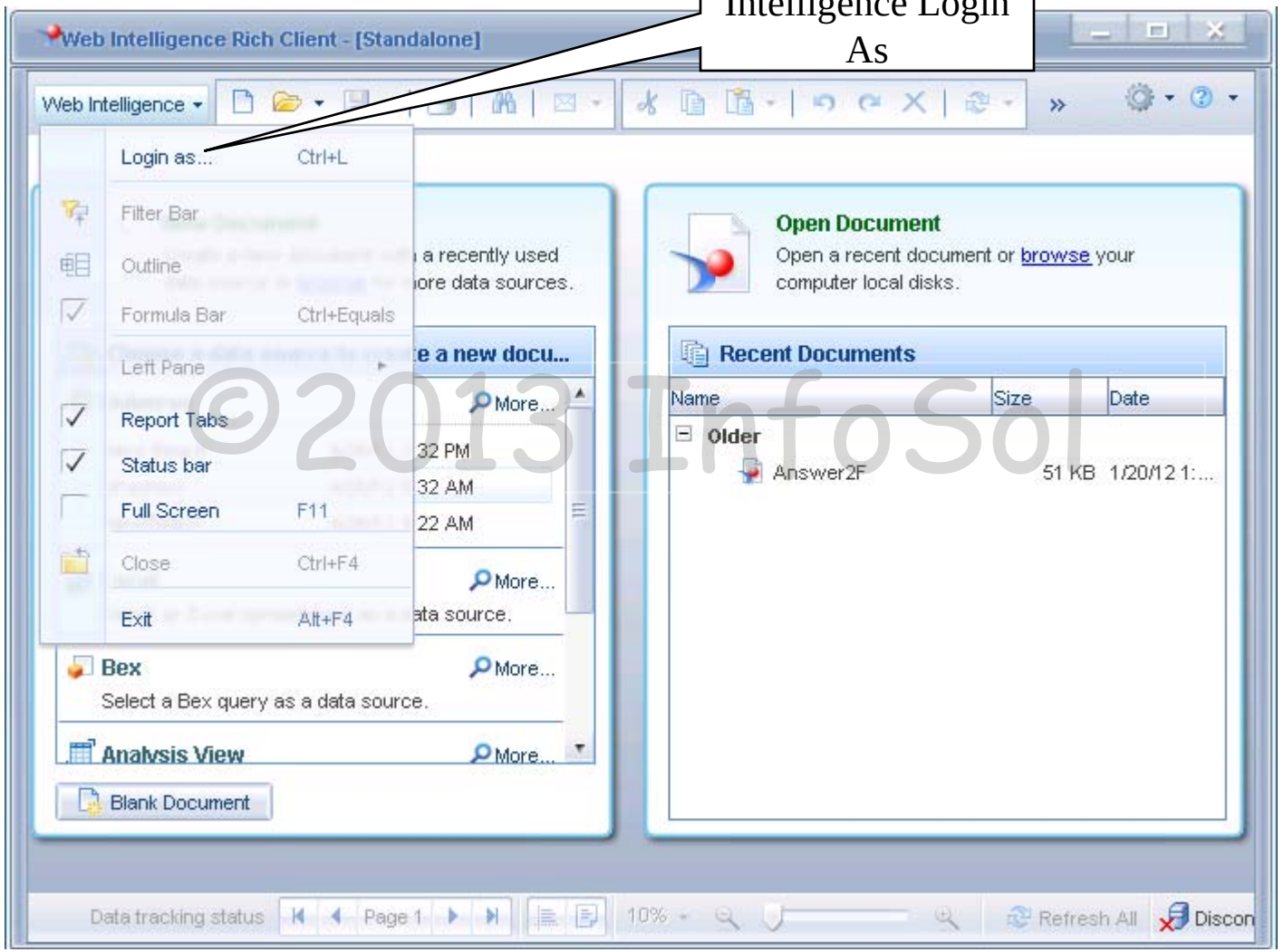
Logging Into Rich-Client



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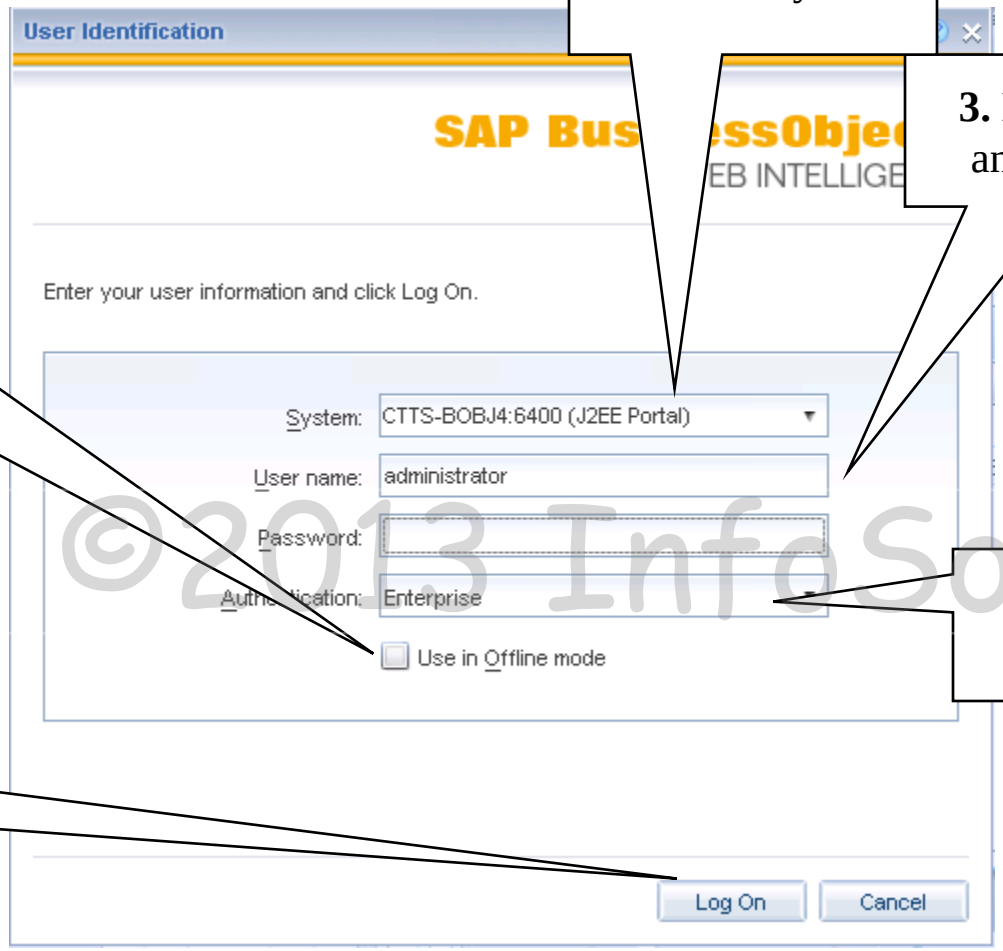
Logging On



2. Select System

3. Enter Userid and Password

Offline Mode Available. User must have logged in Successfully to repository at least once

4. Select Authentication Type

5. Select Log On

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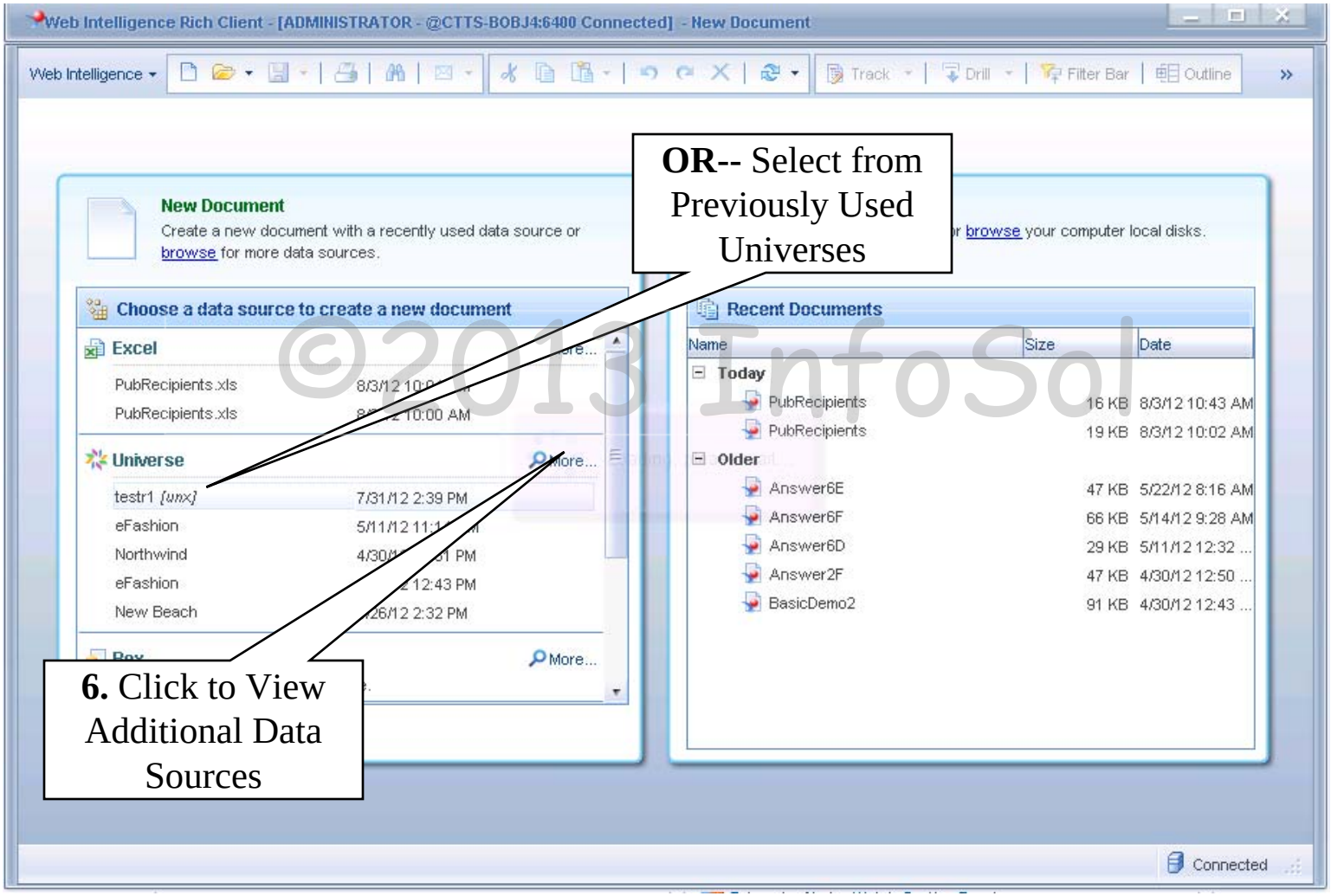
Creating New Documents: Using a Universe



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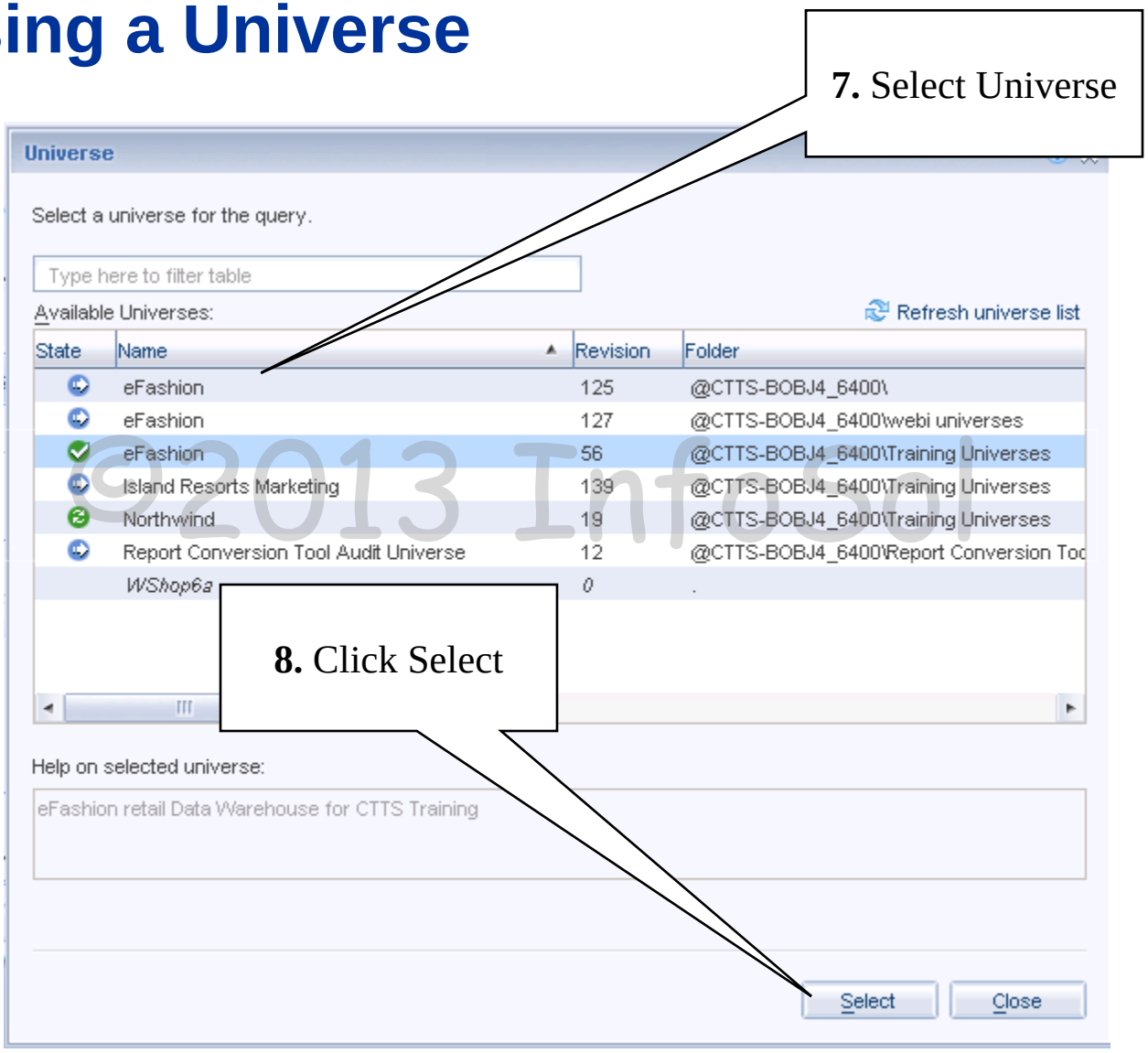
Creating New Documents: Using a Universe



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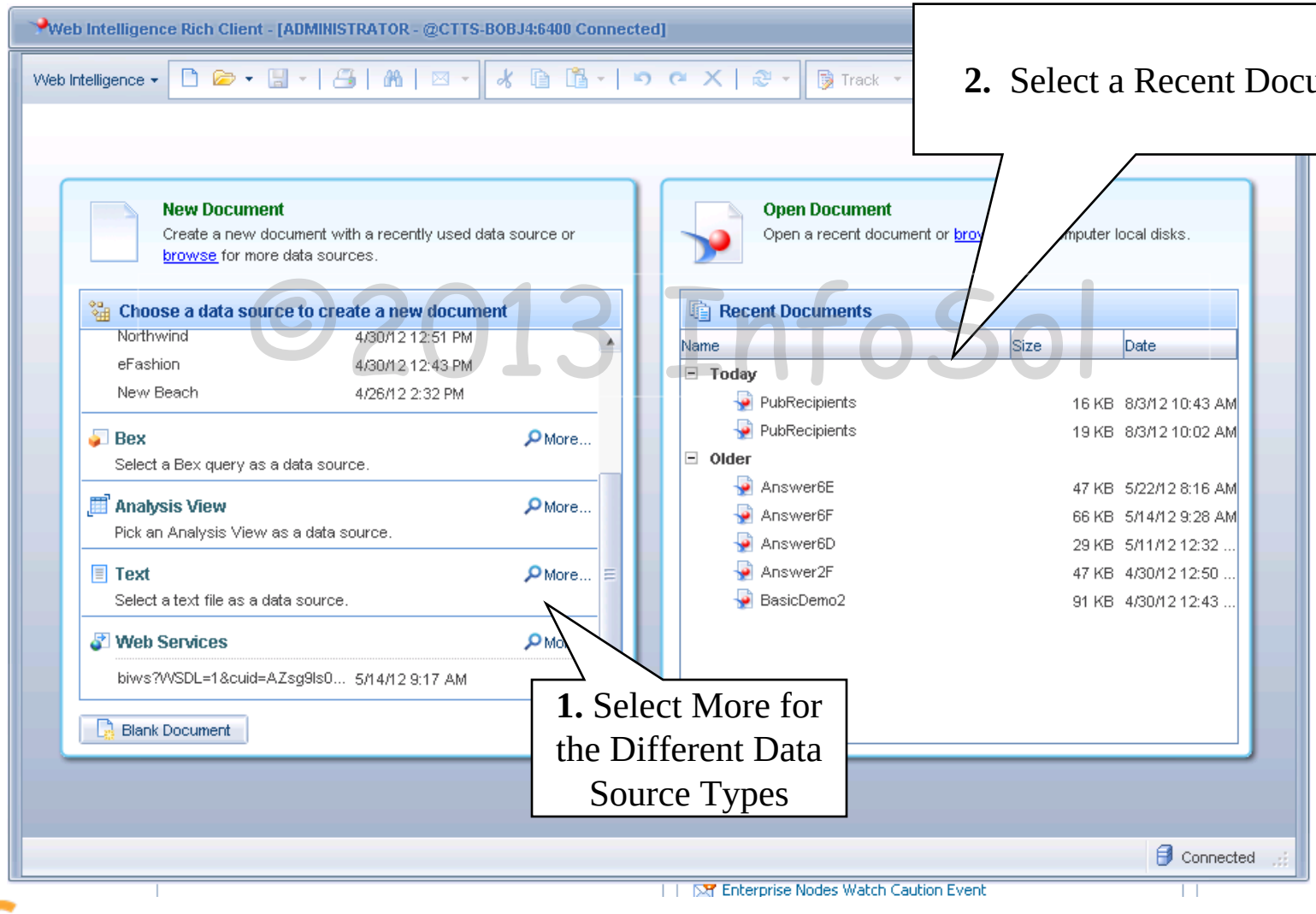
Creating New Documents: From Other Data Sources



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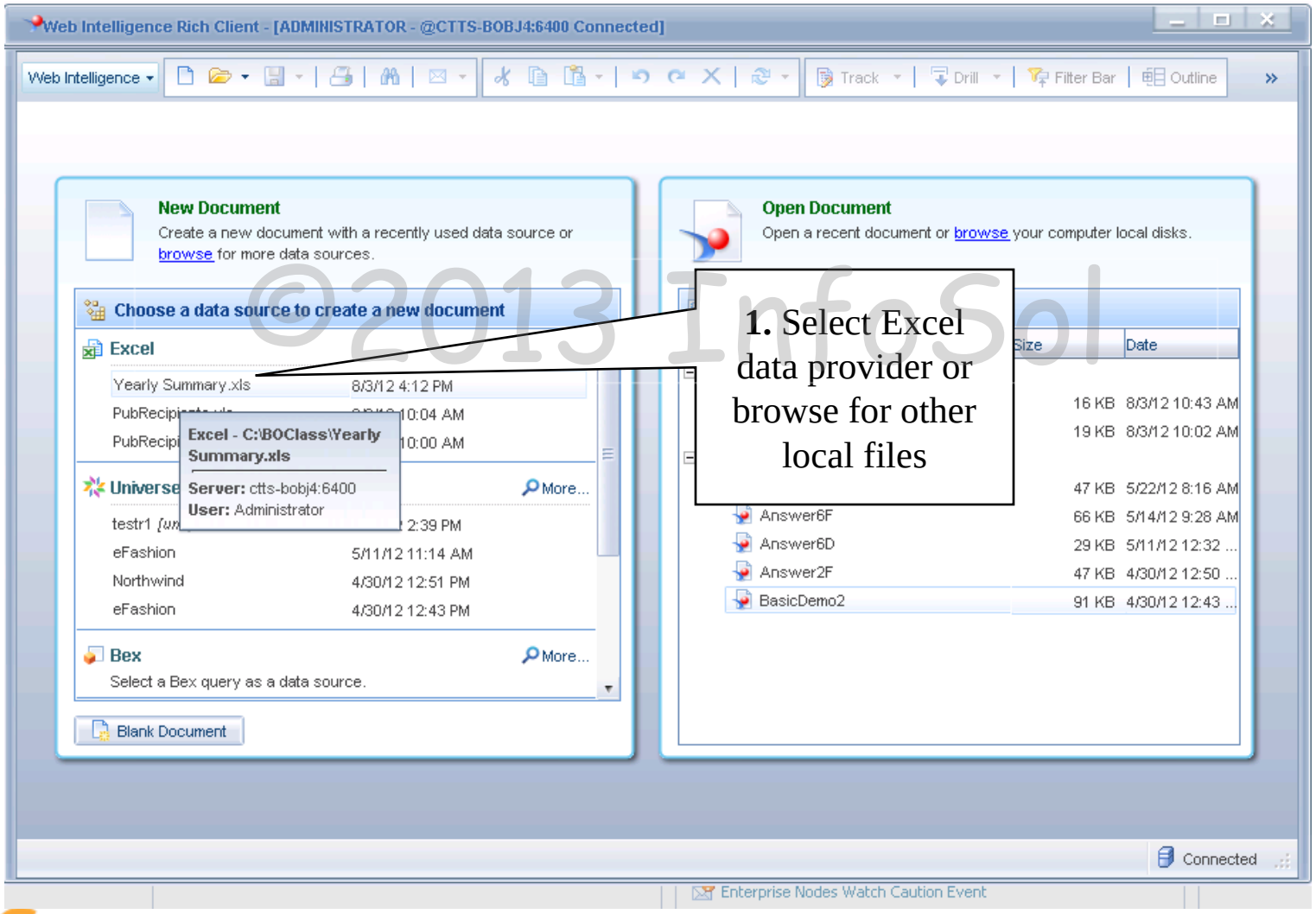
Creating New Documents: From Other Data Sources



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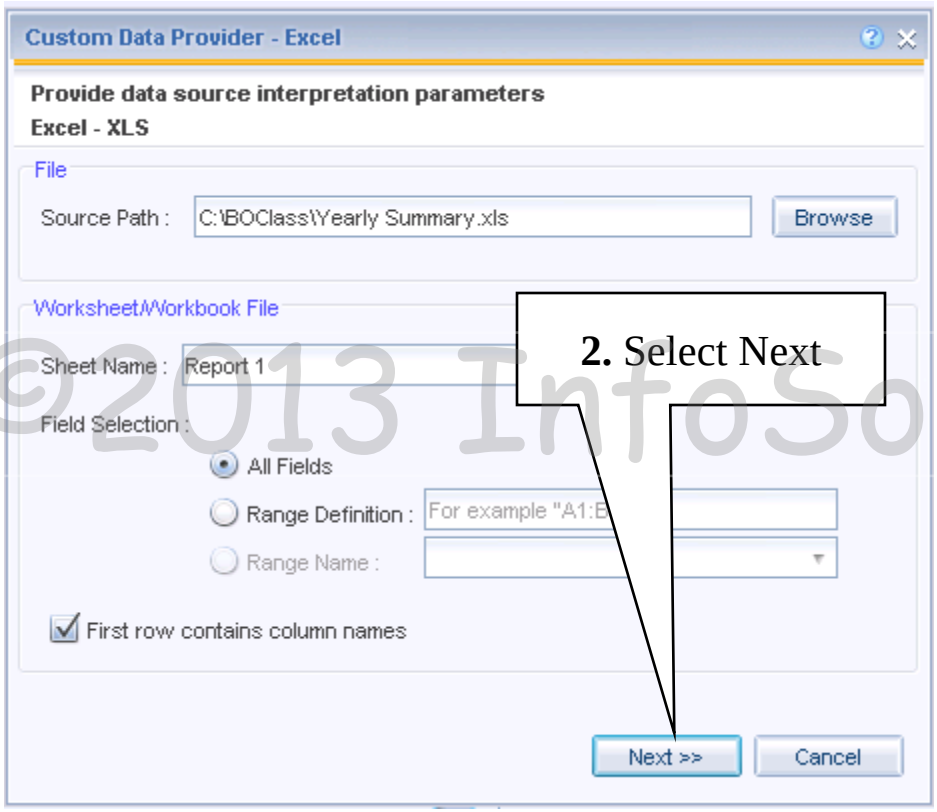
1. Select Excel data provider or browse for other local files

Creating New Documents: From Other Data Sources



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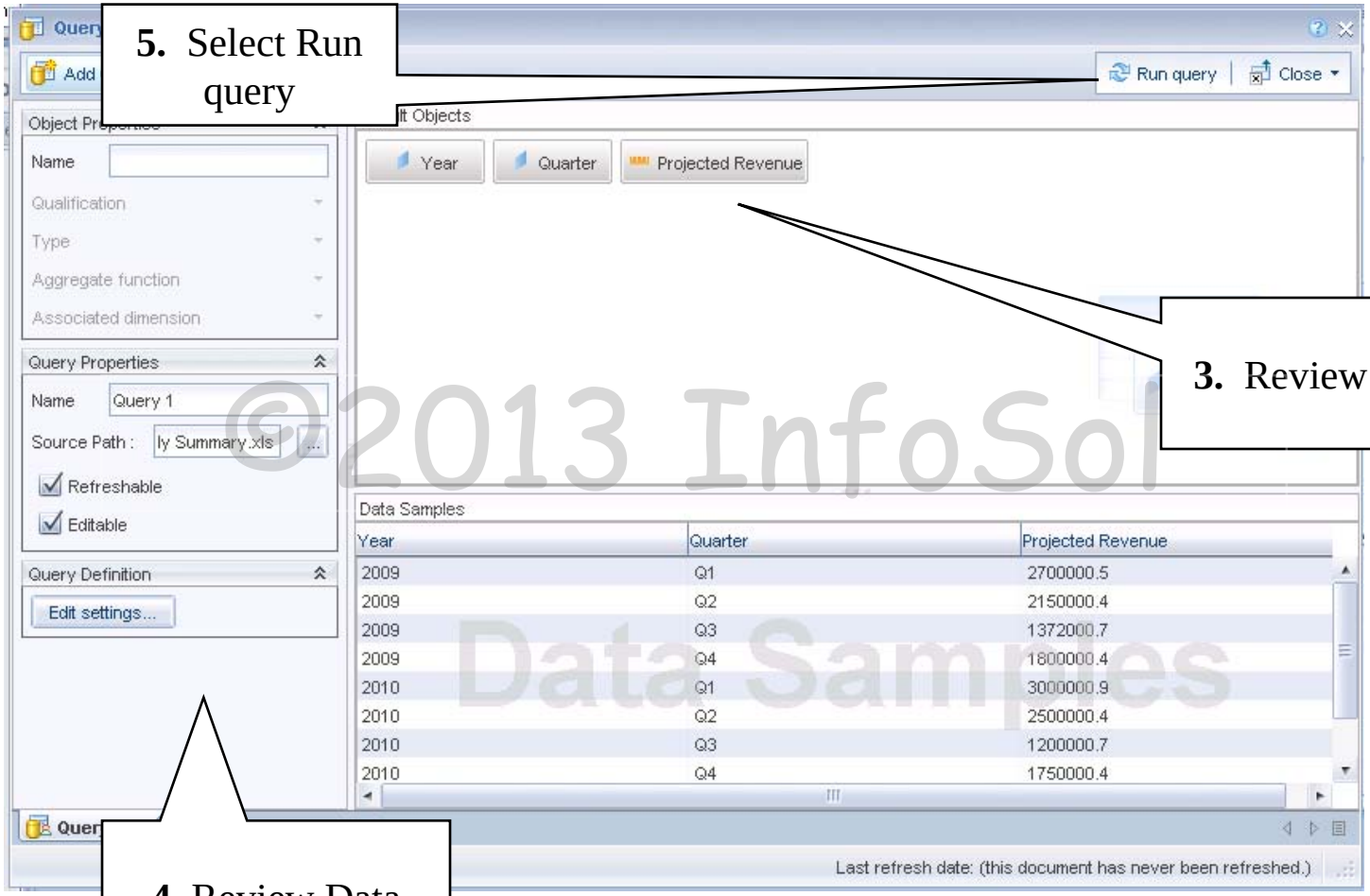

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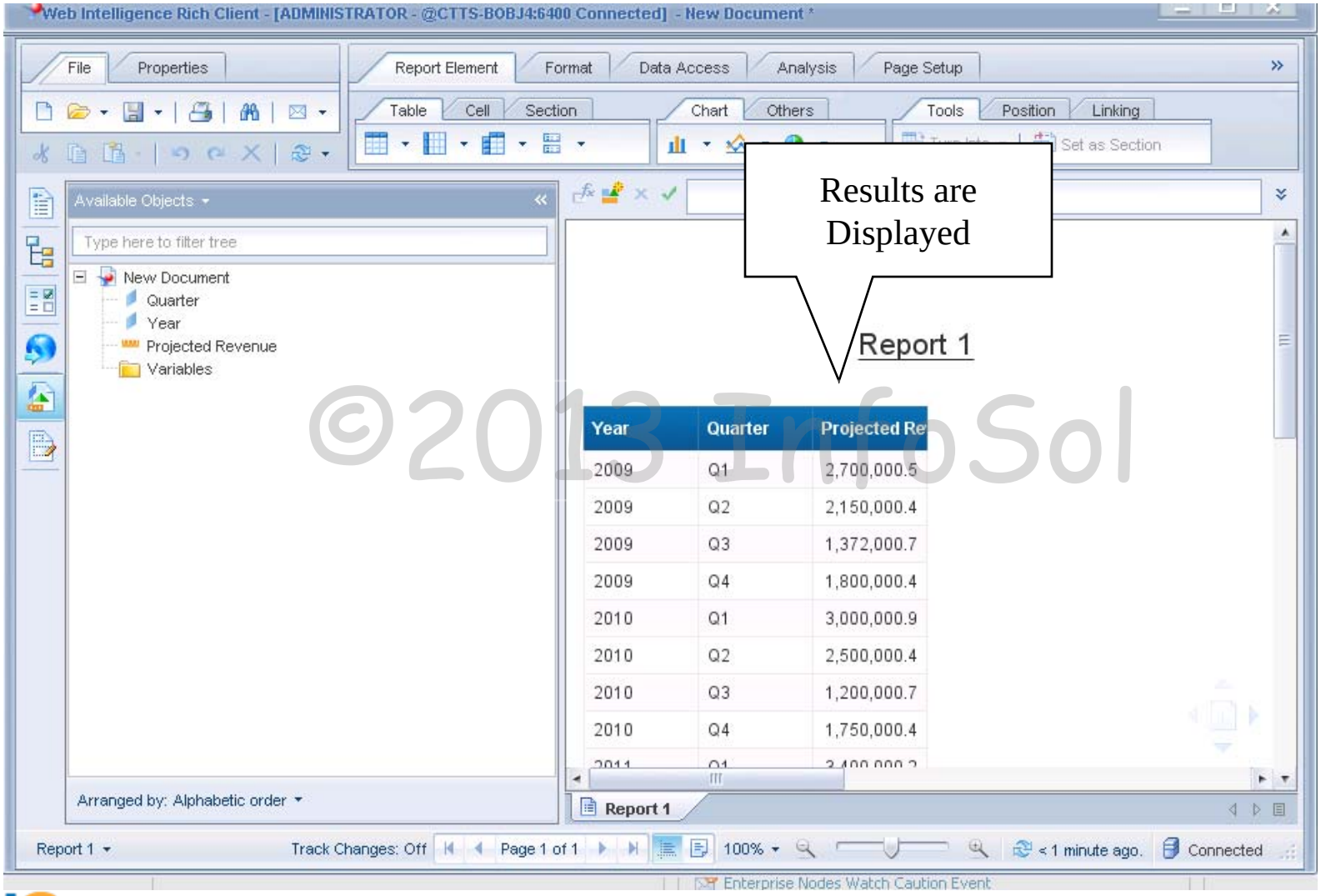
Creating New Documents: From Other Data Sources



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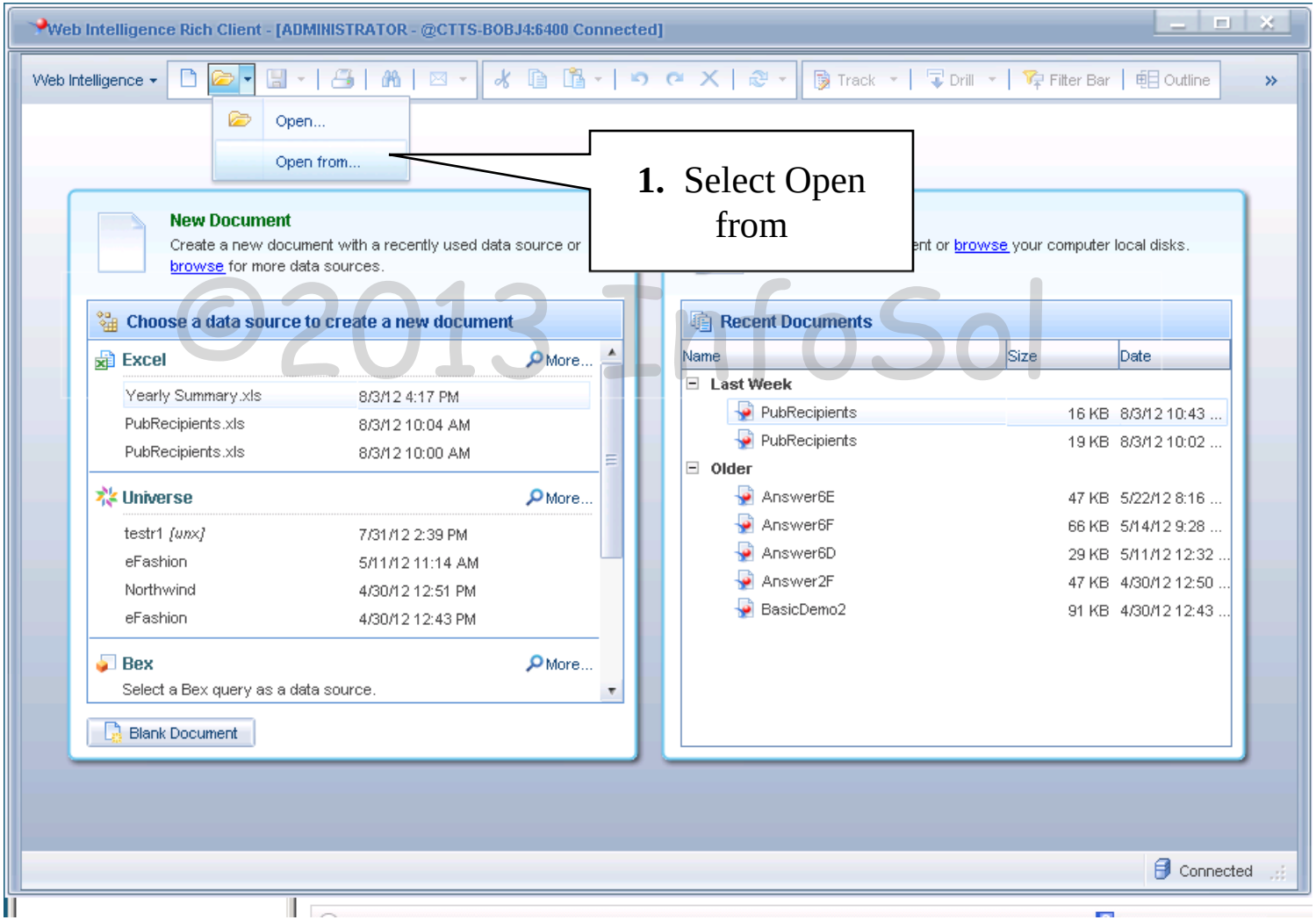
Opening Documents from the Repository



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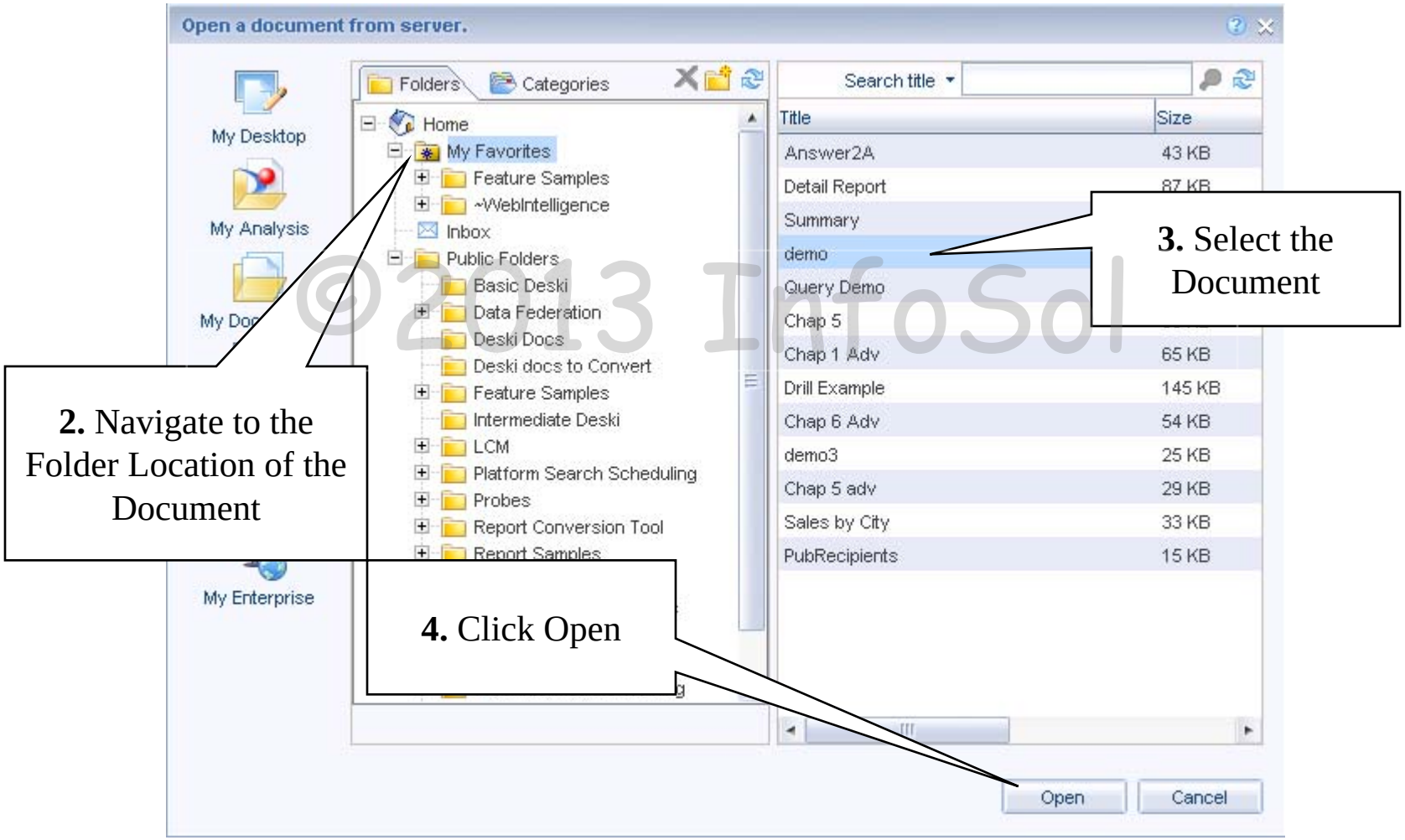

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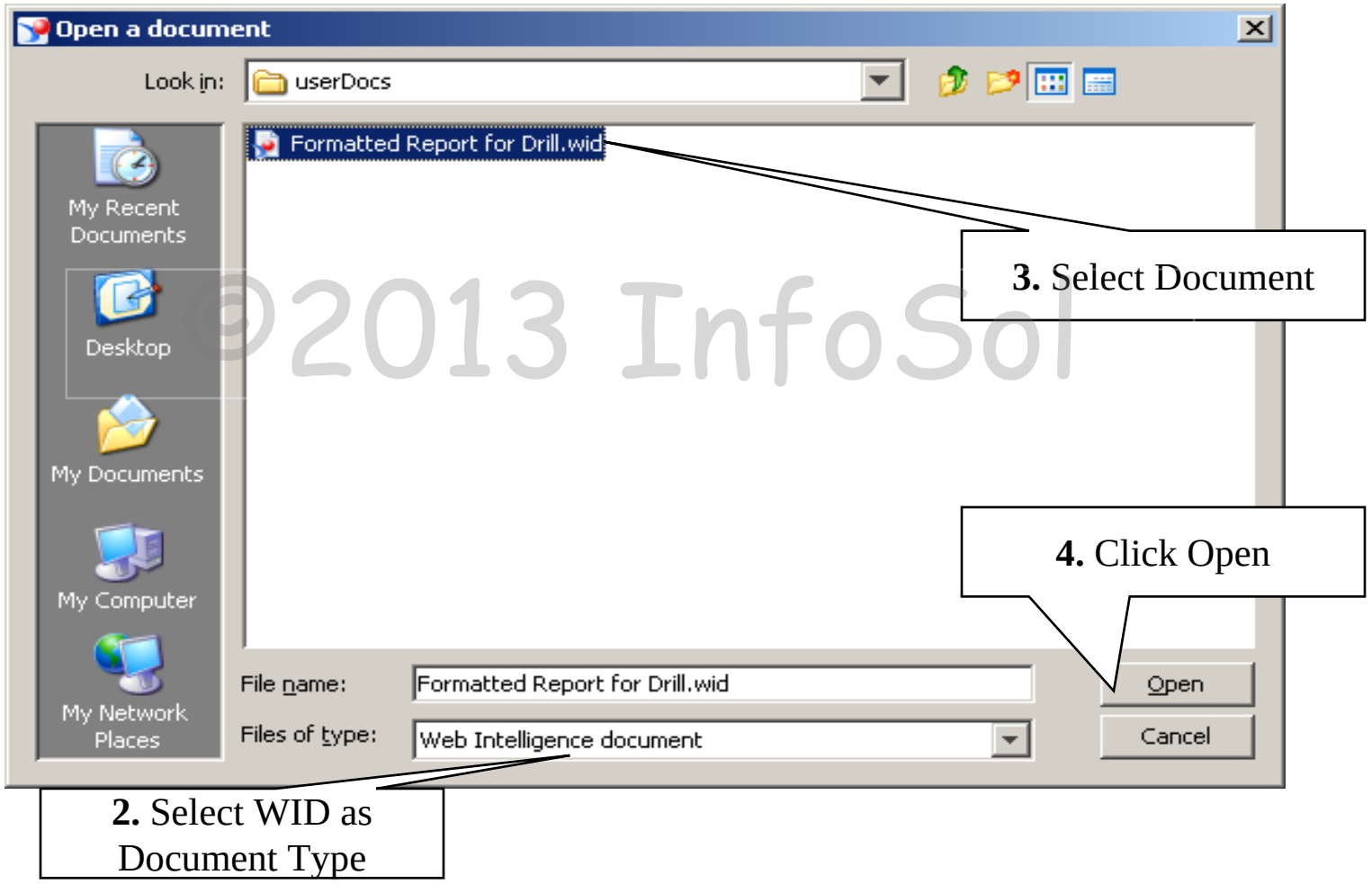
Using an Imported Document



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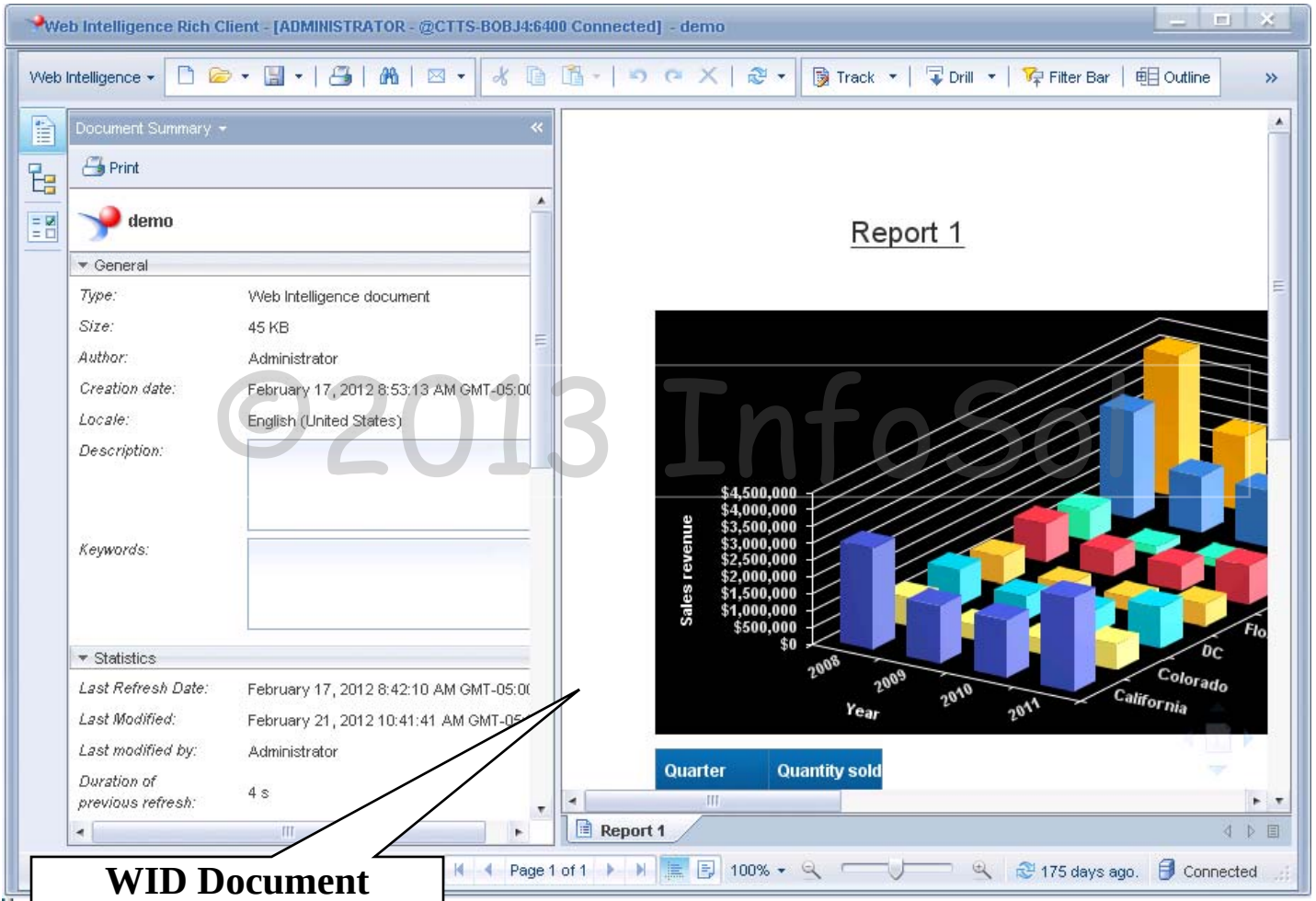
Viewing Imported Document



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Using Multiple Queries From A Single Universe

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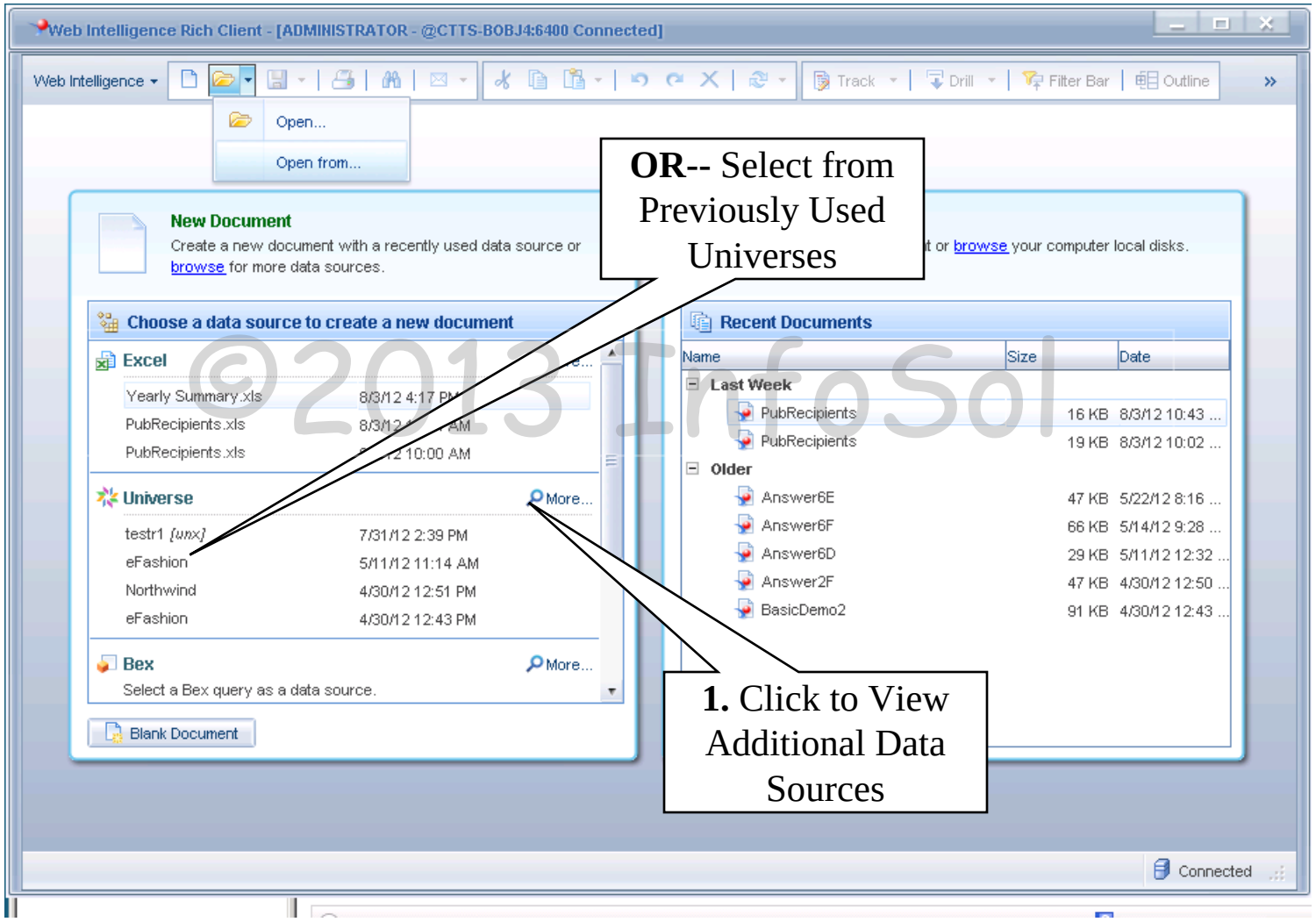
Using Multiple Queries: From the Same Universe



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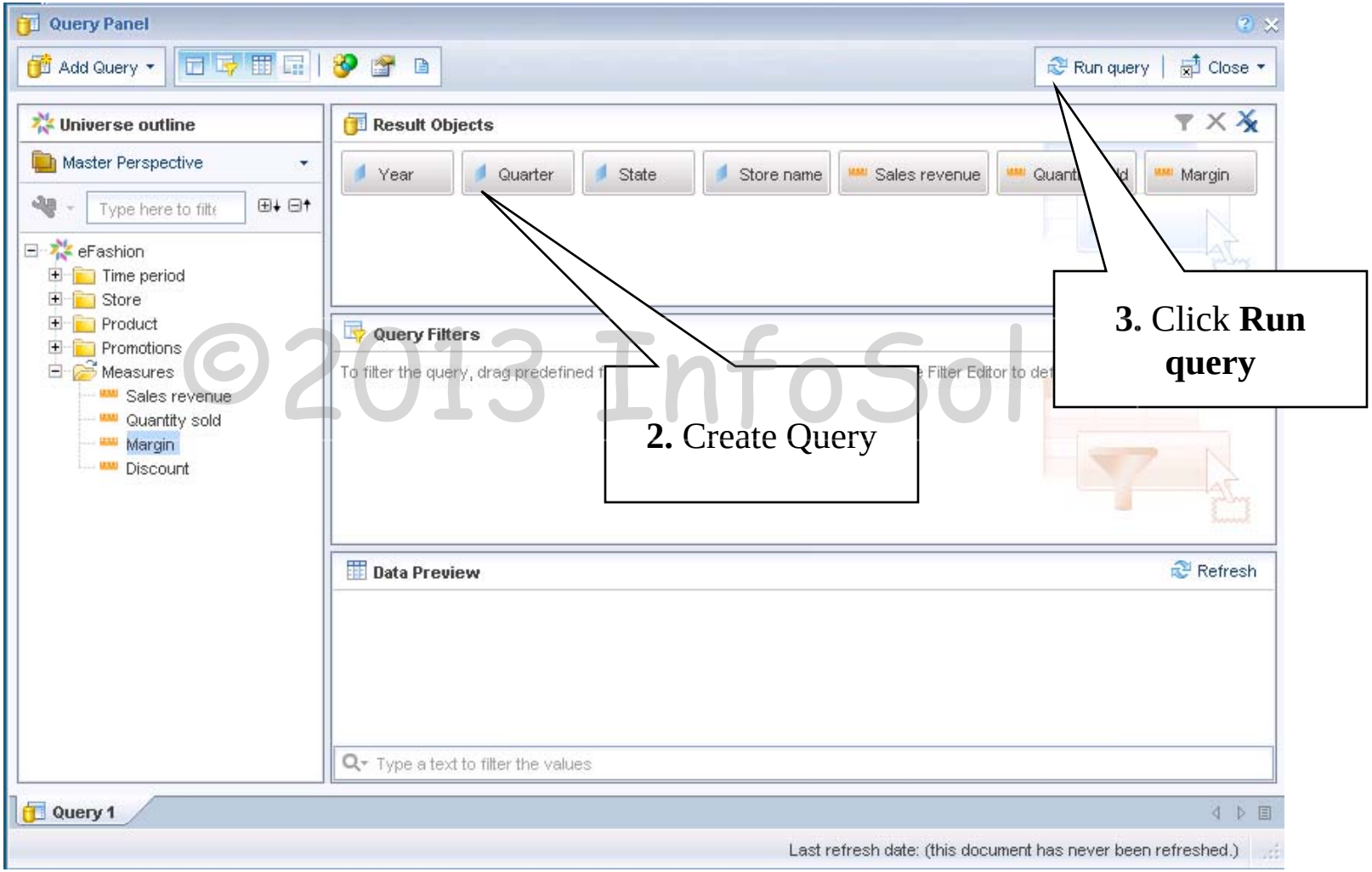

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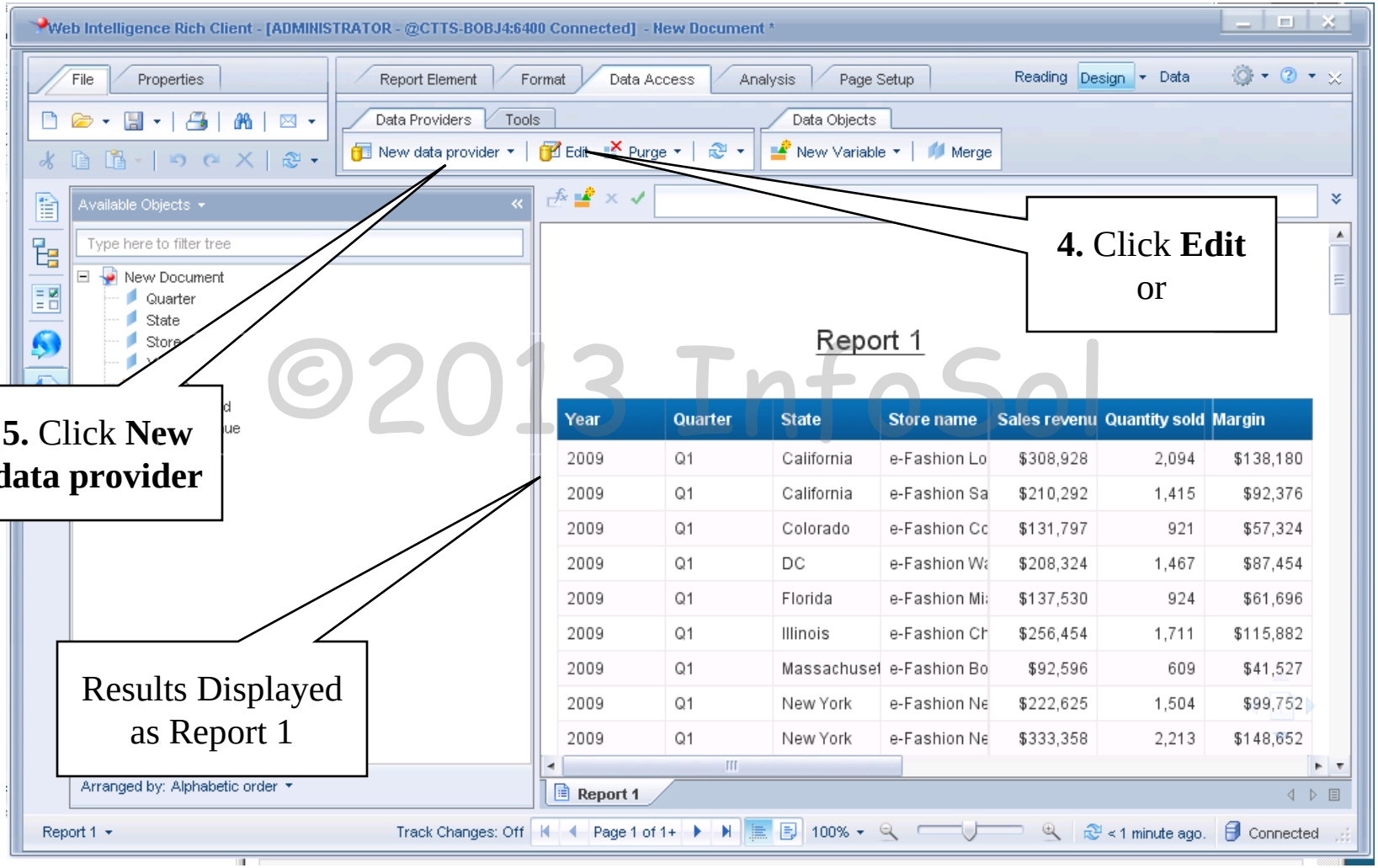

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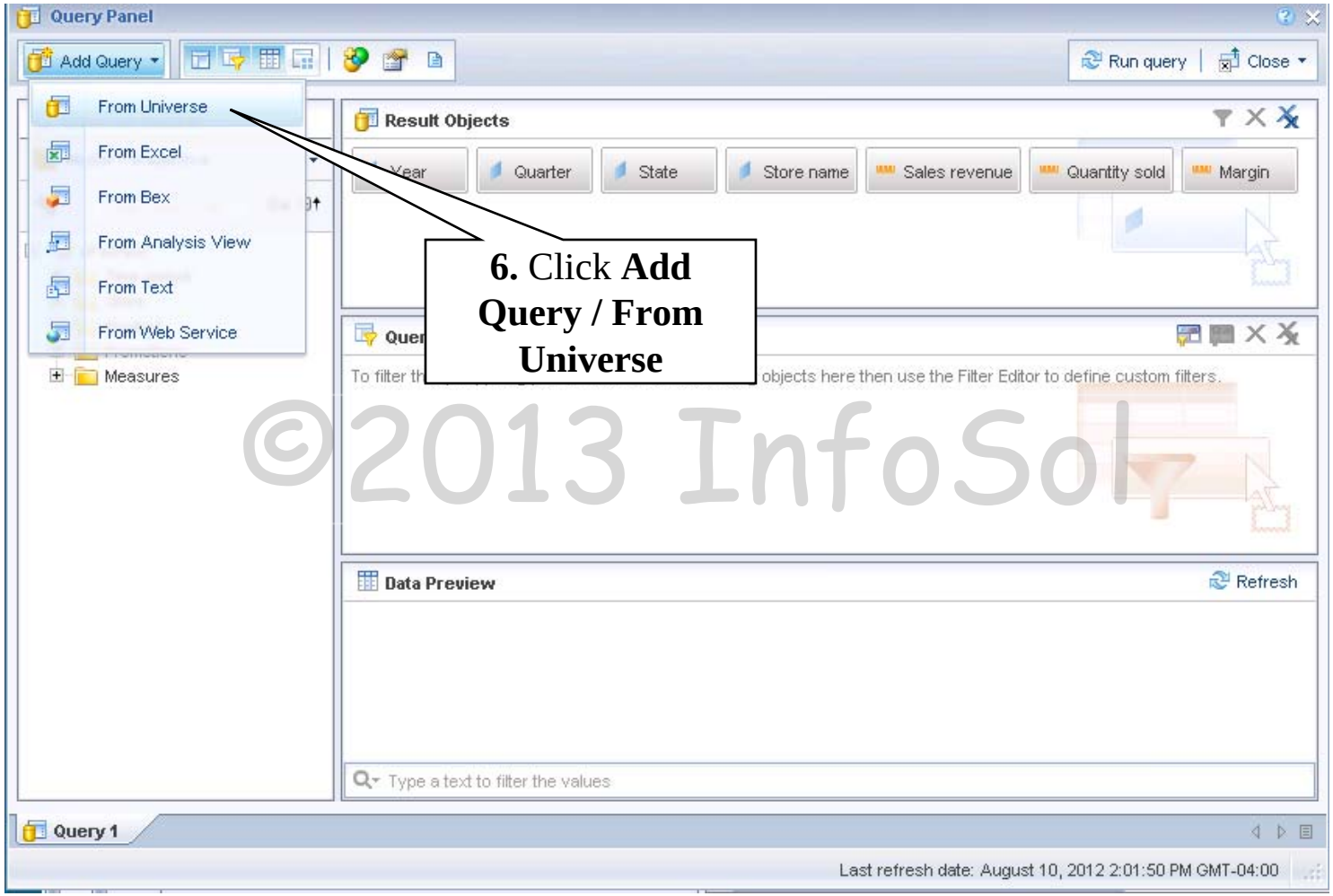

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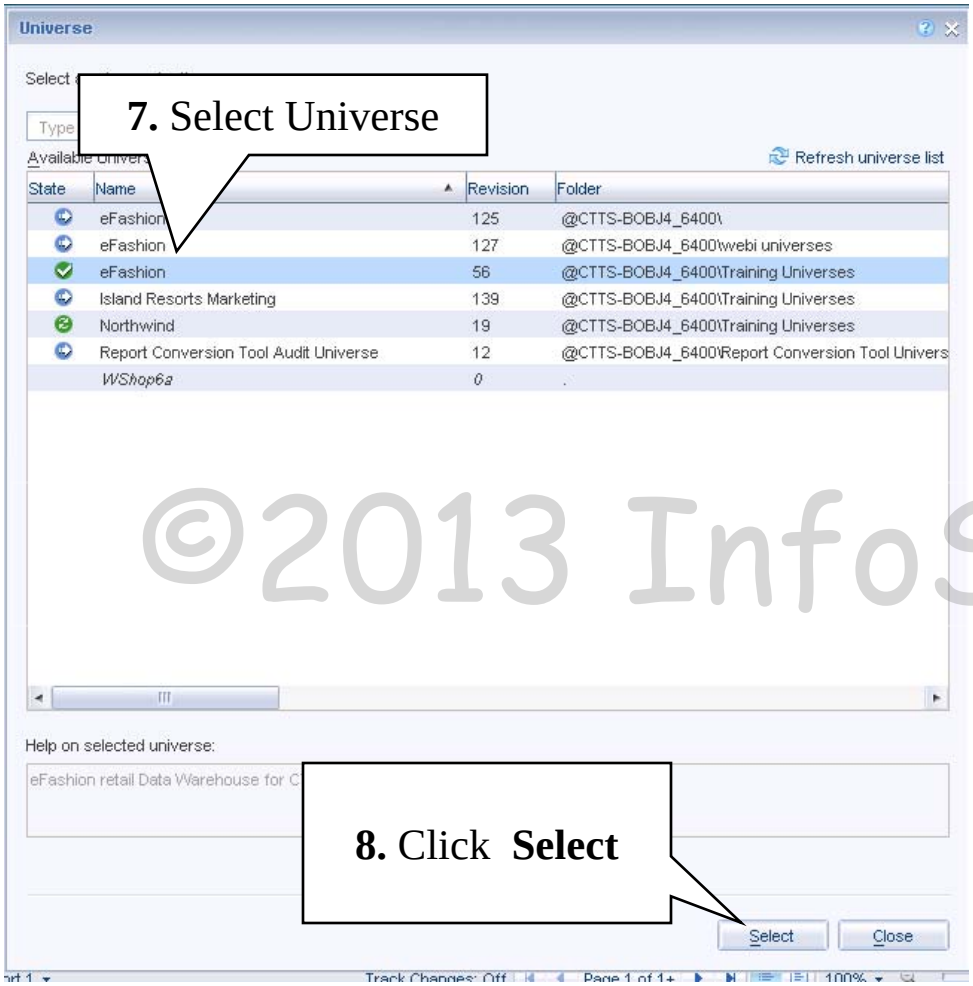

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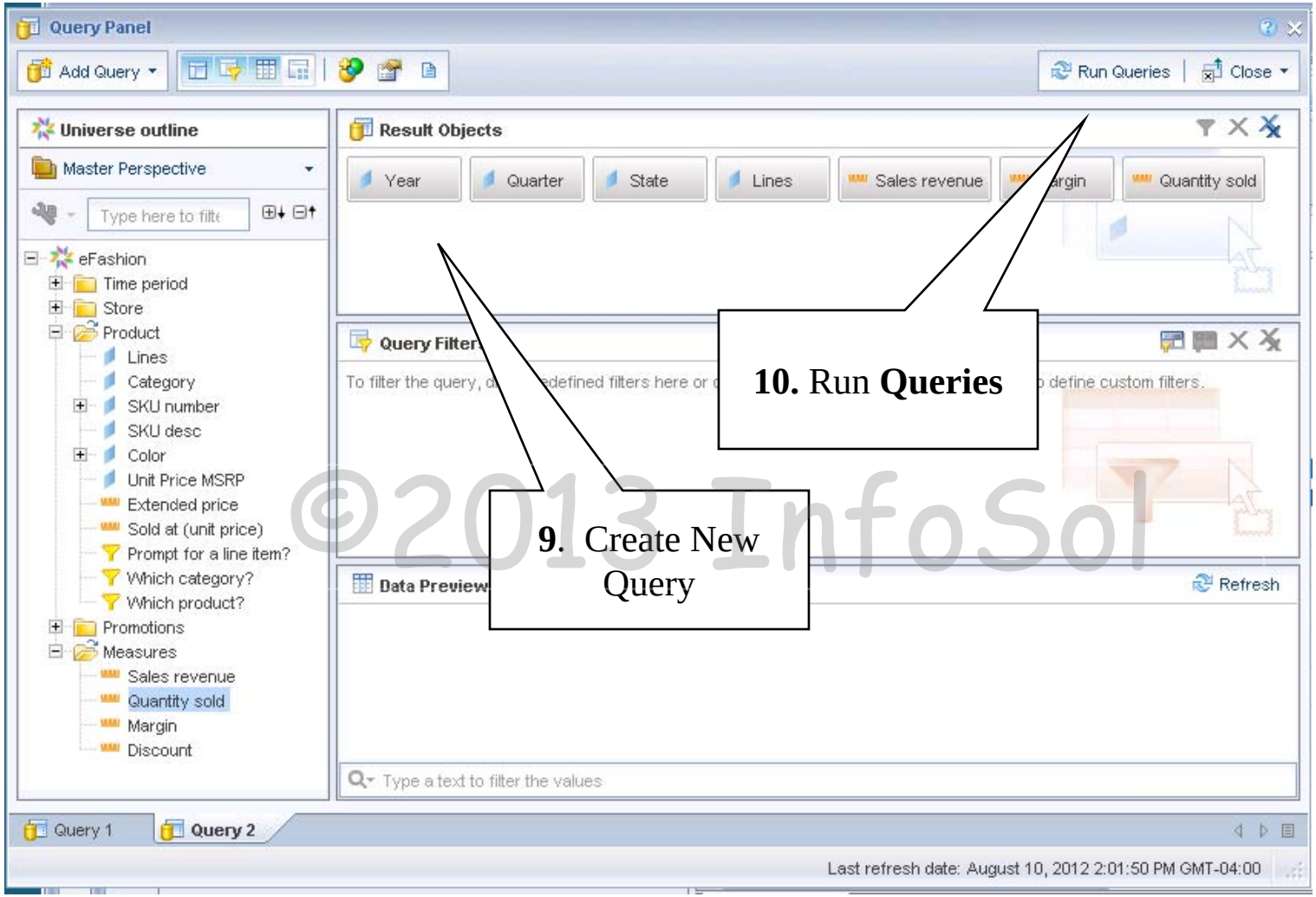

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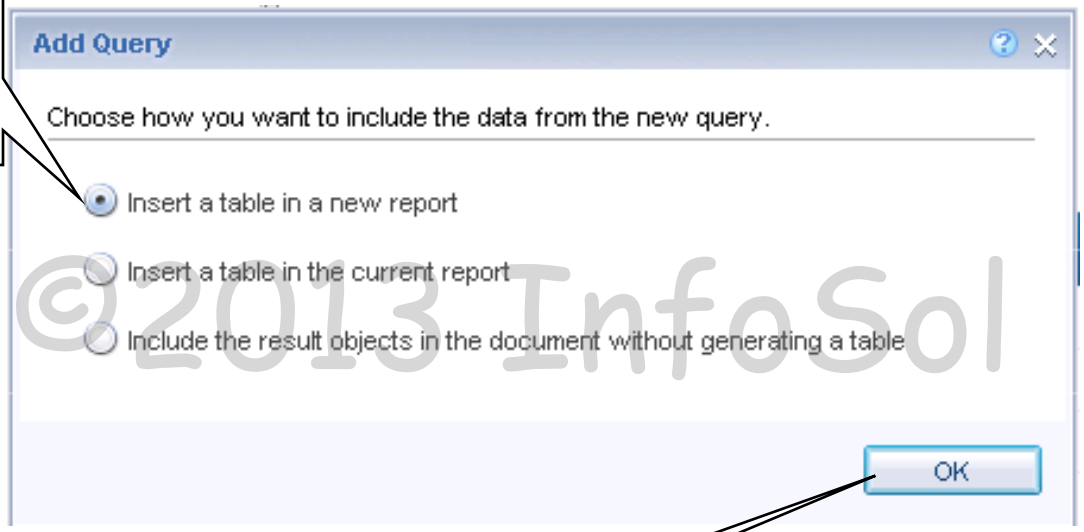
Using Multiple Queries: From the Same Universe

11. Choose Option to Insert Table in a New Report



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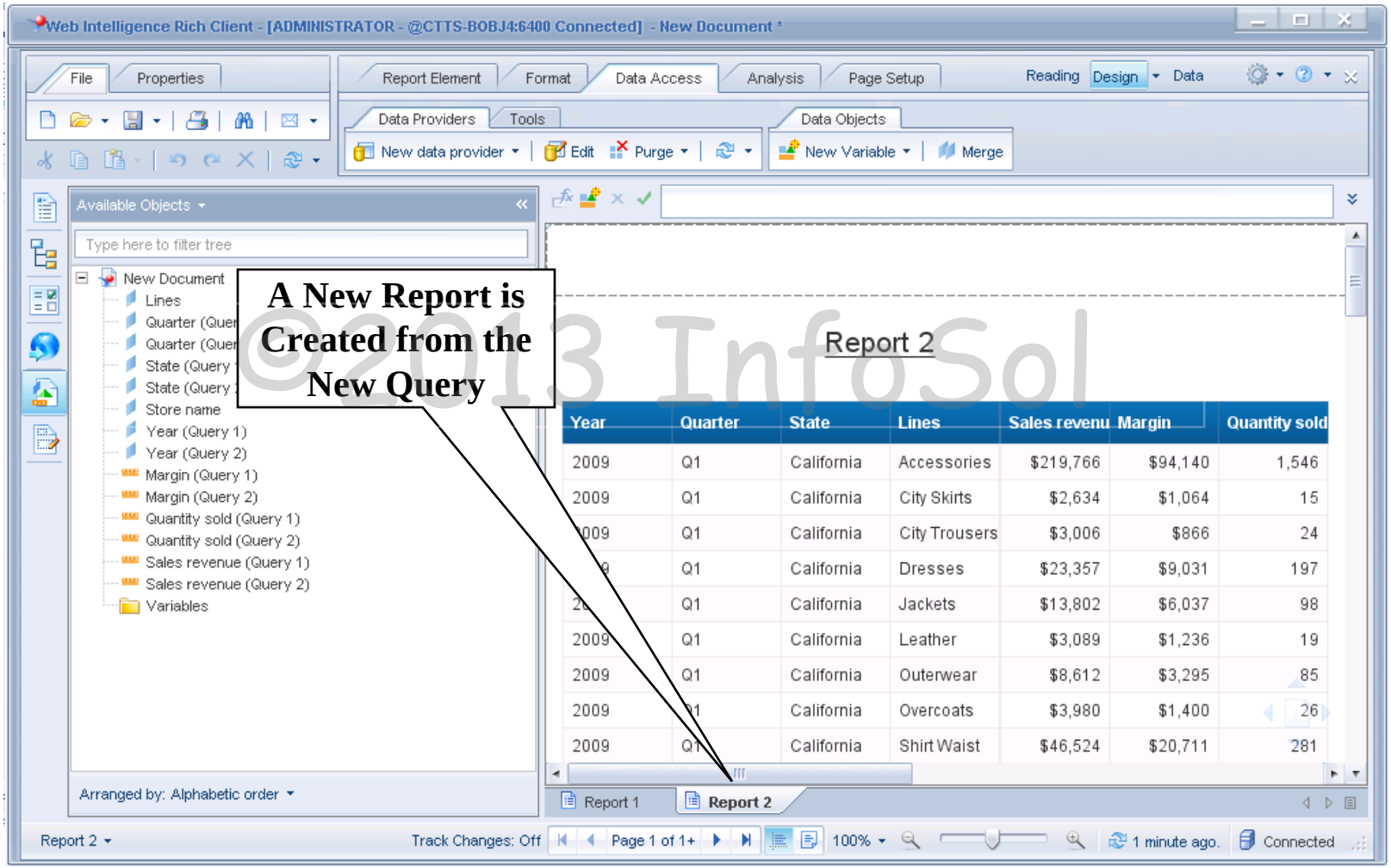
12. Click **OK**

Using Multiple Queries: From the Same Universe



Using Multiple Queries From Multiple Universes

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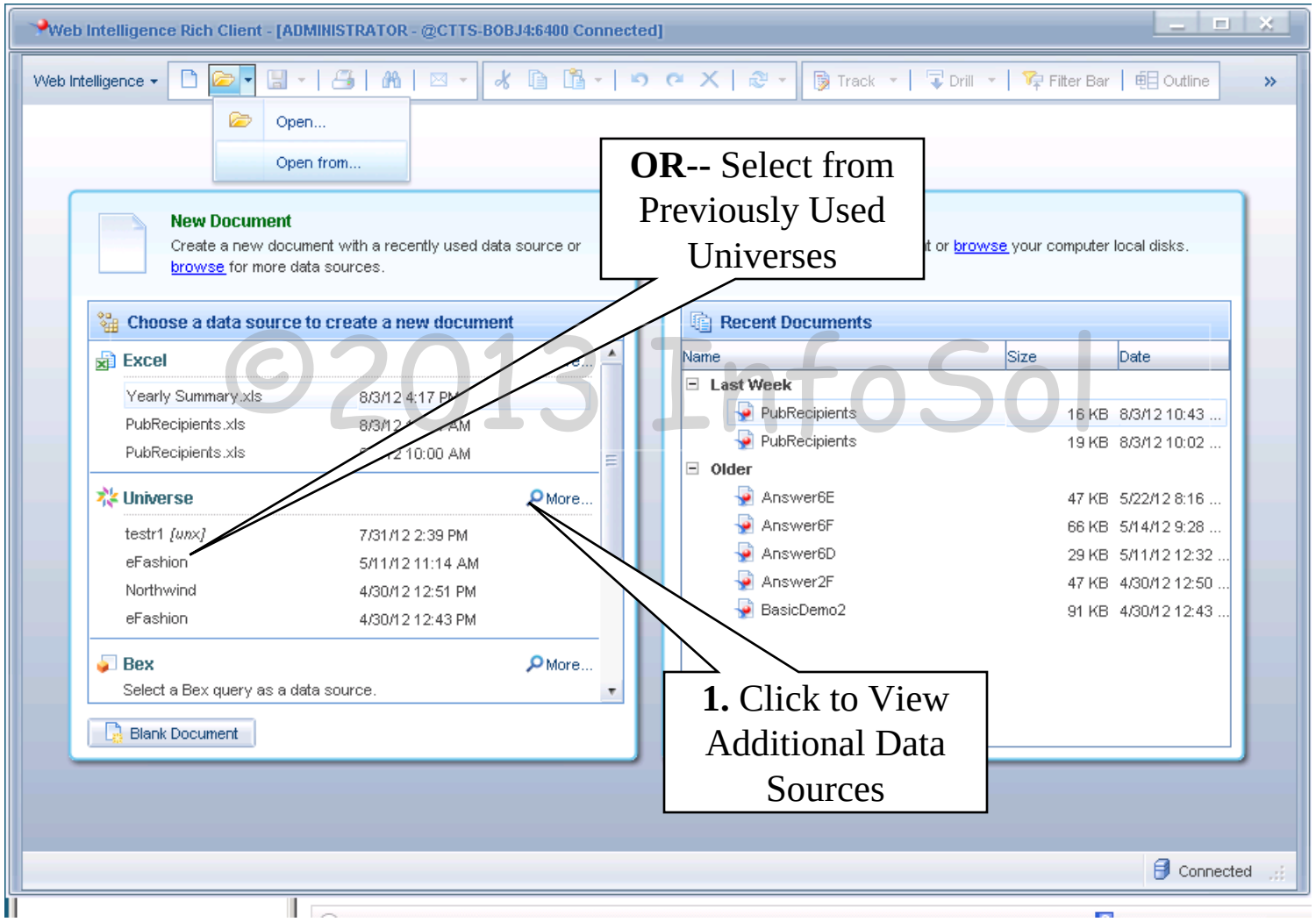
Using Multiple Queries: From the Same Universe



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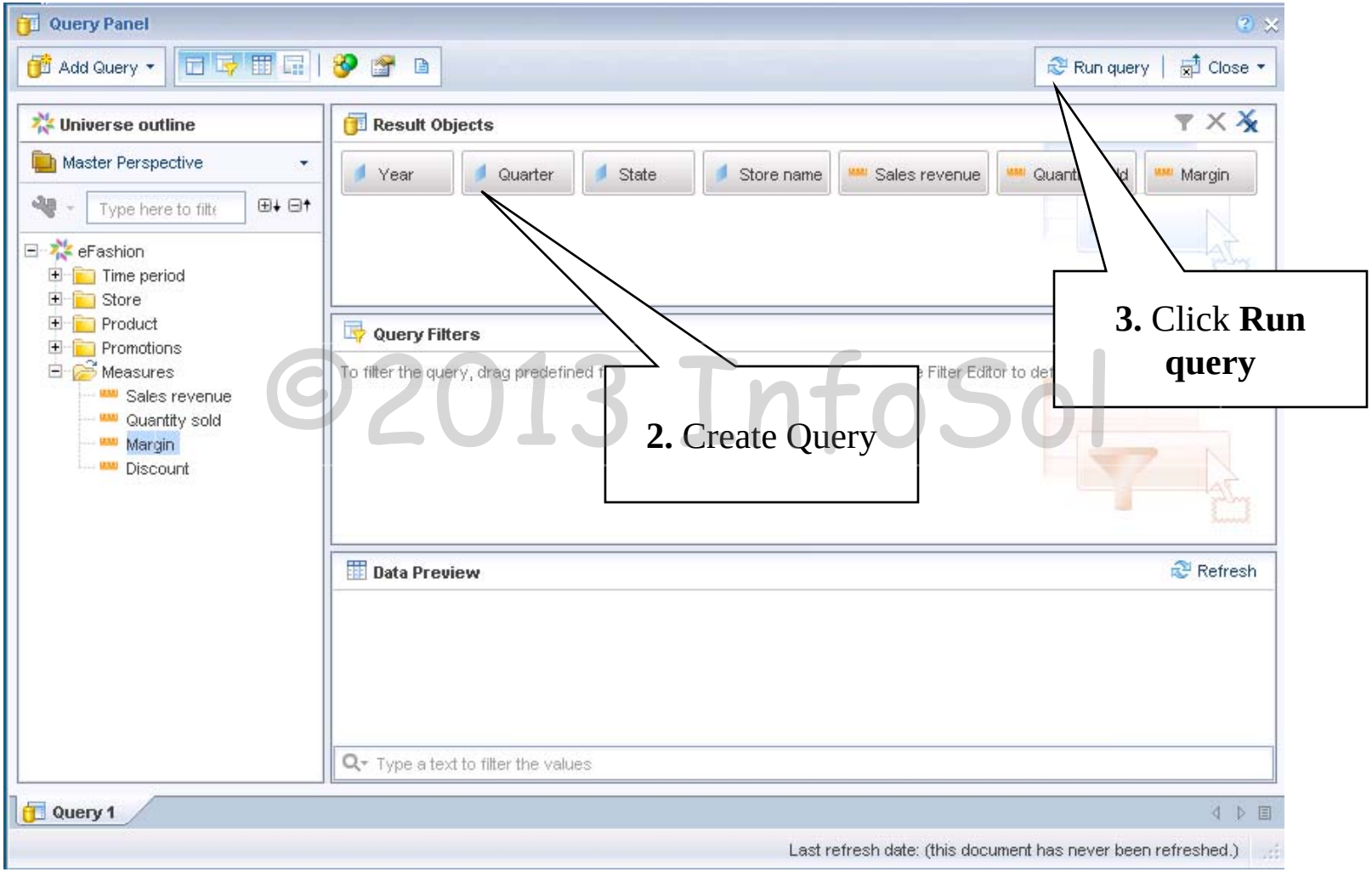
Using Multiple Queries: From Multiple Universes



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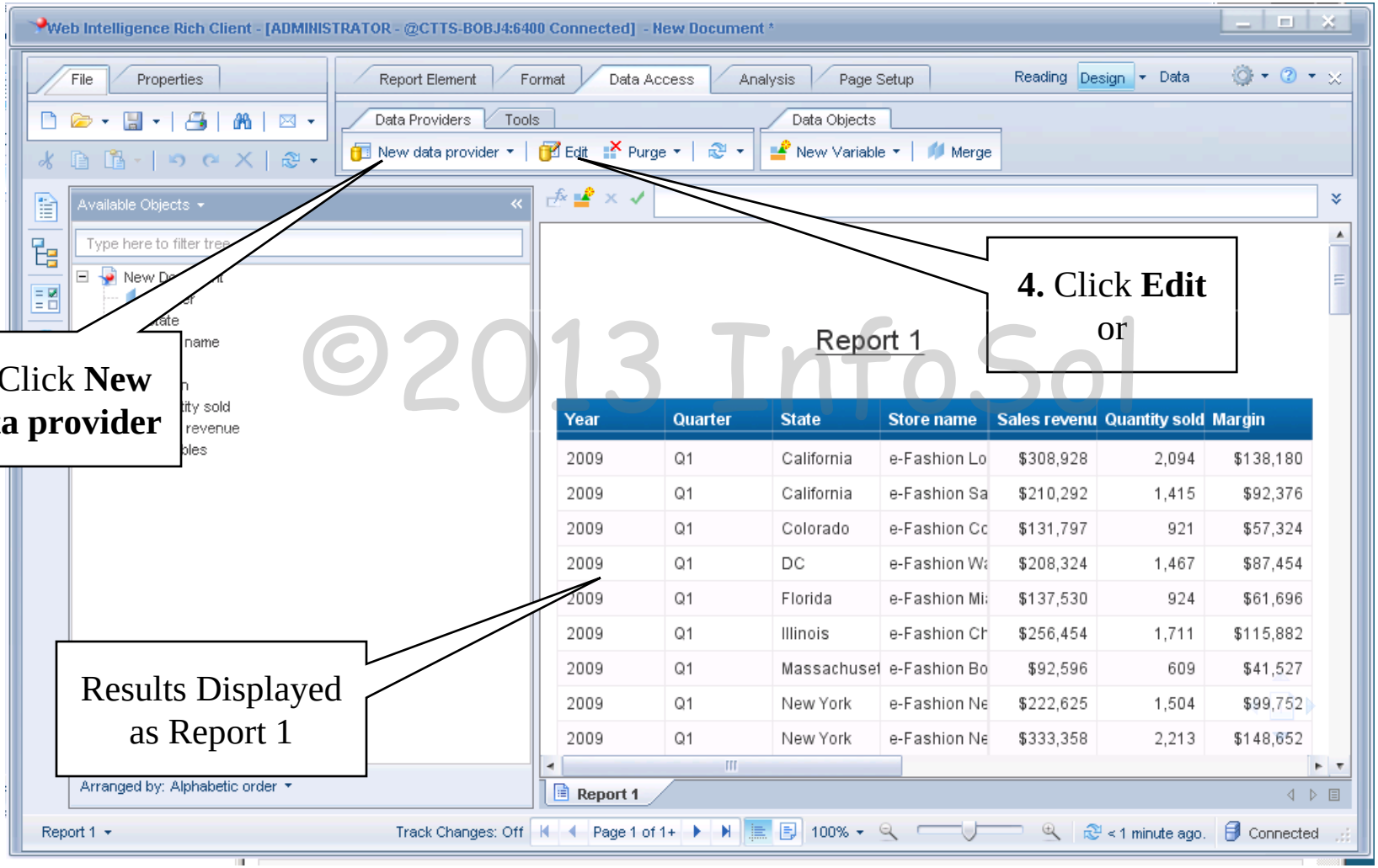
Using Multiple Queries: From Multiple Universes



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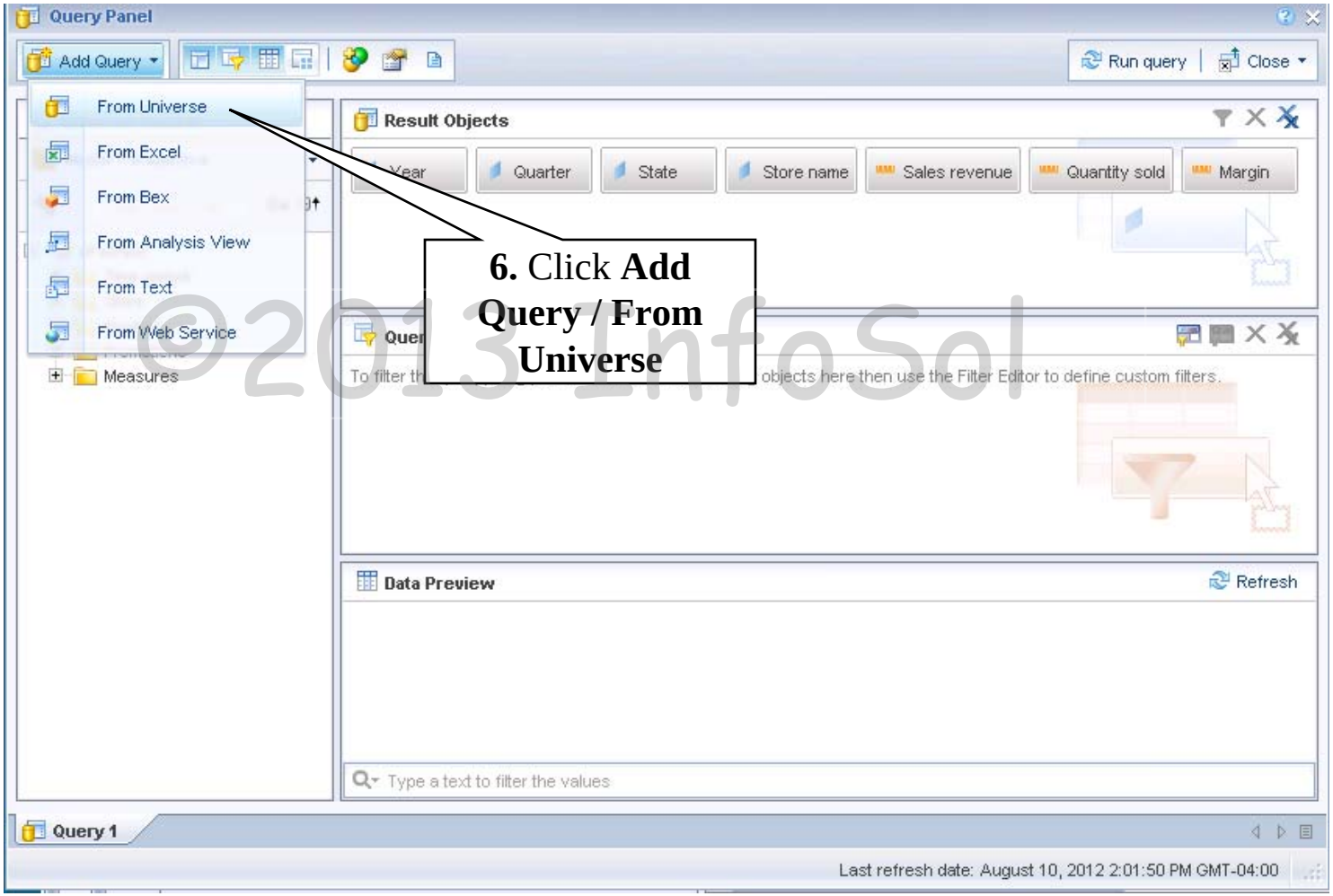
Using Multiple Queries: From Multiple Universes



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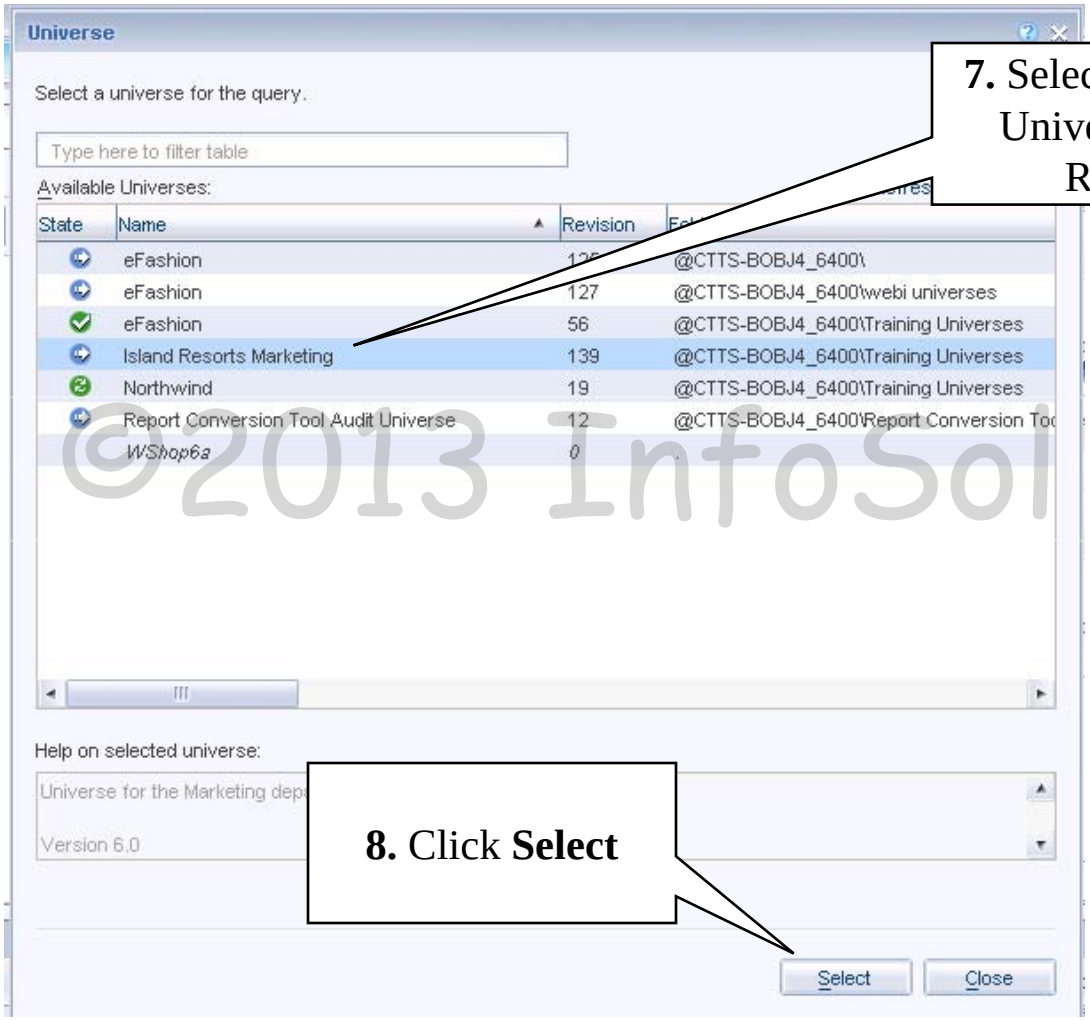

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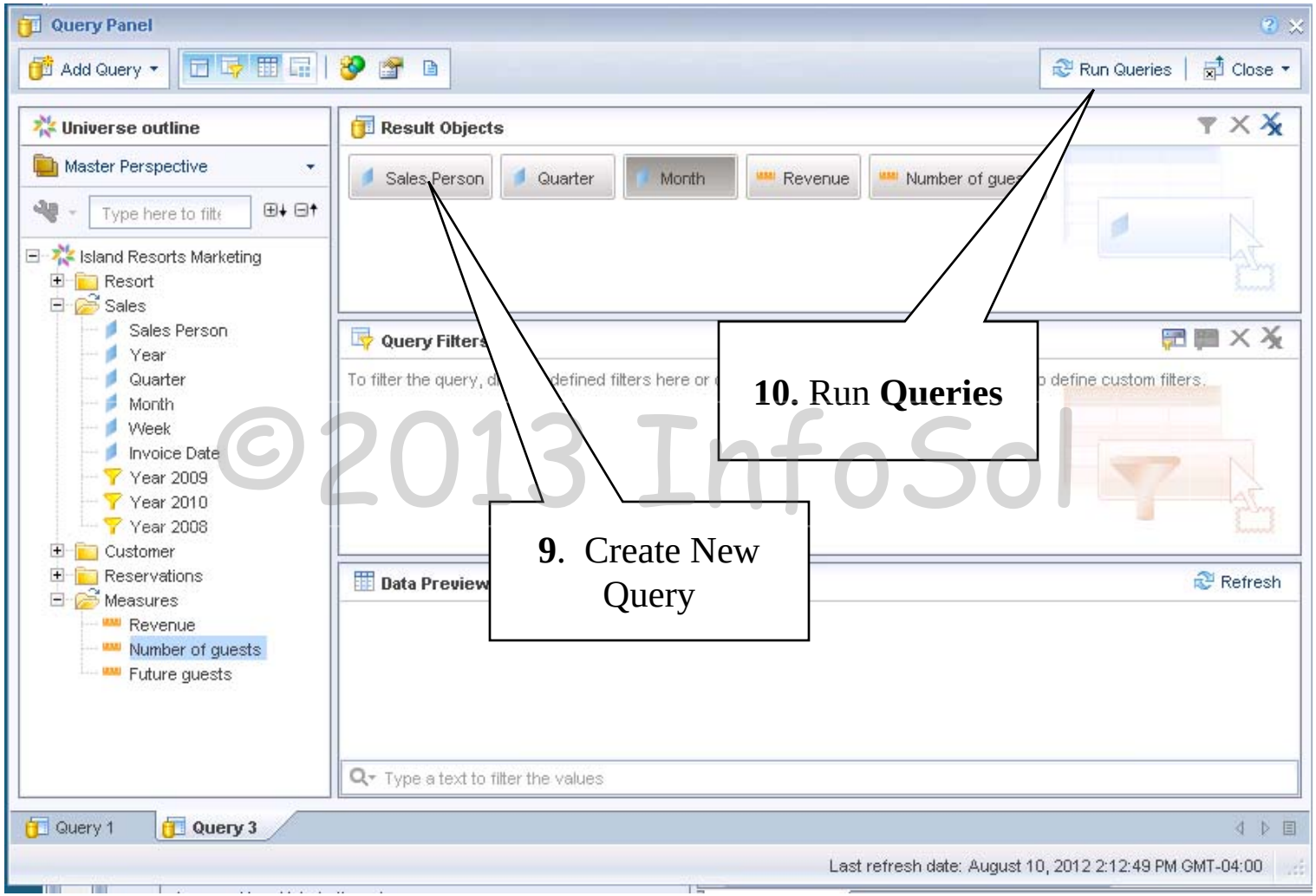

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Using Multiple Queries: From Multiple Universes

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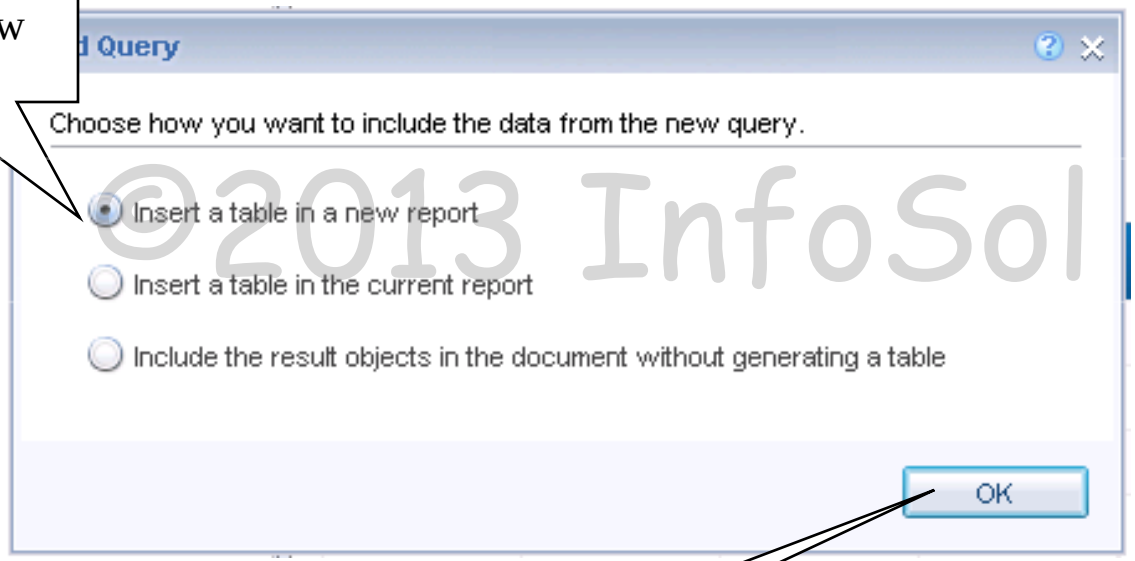

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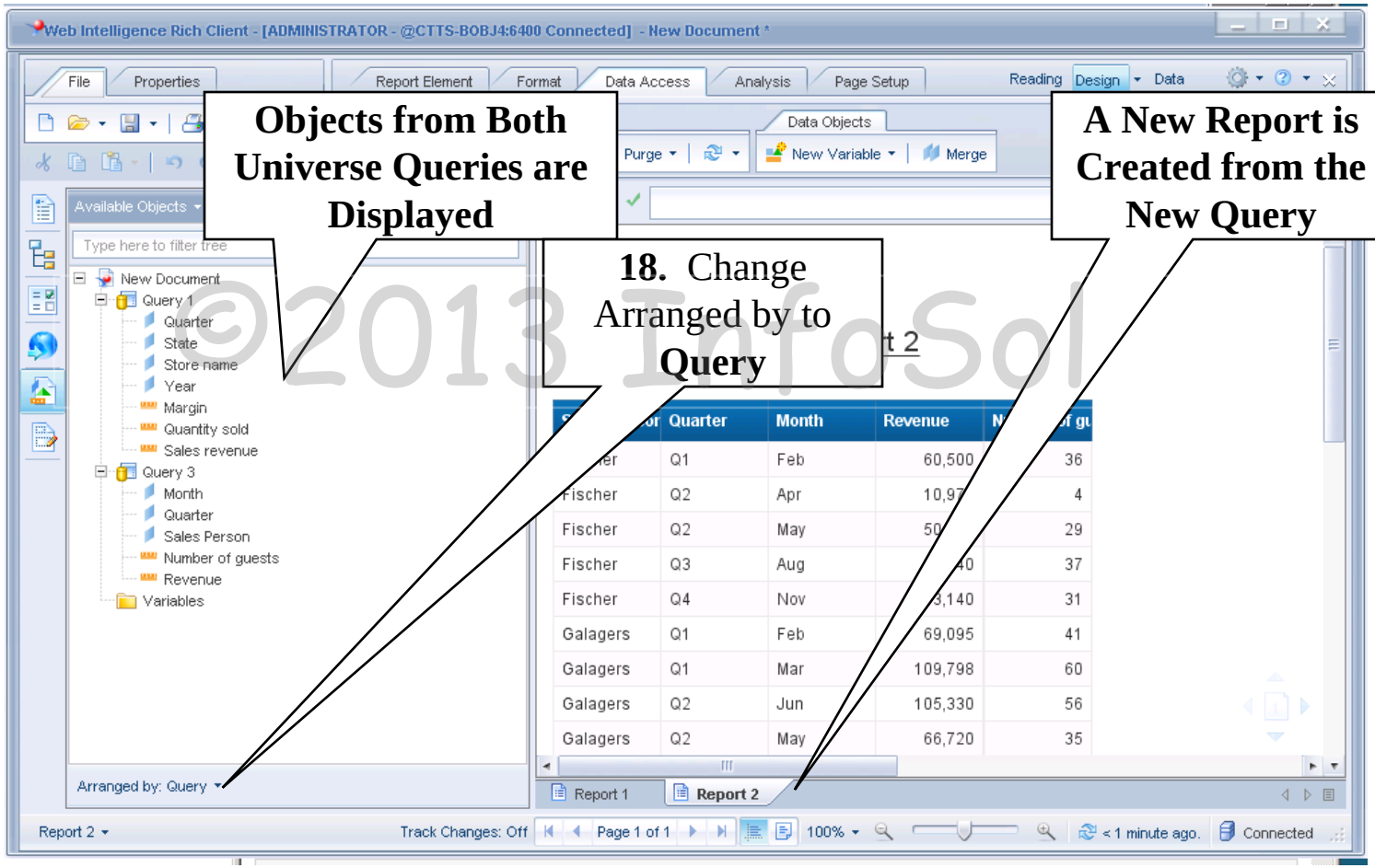
12. Click **OK**

Using Multiple Queries: From Multiple Universes



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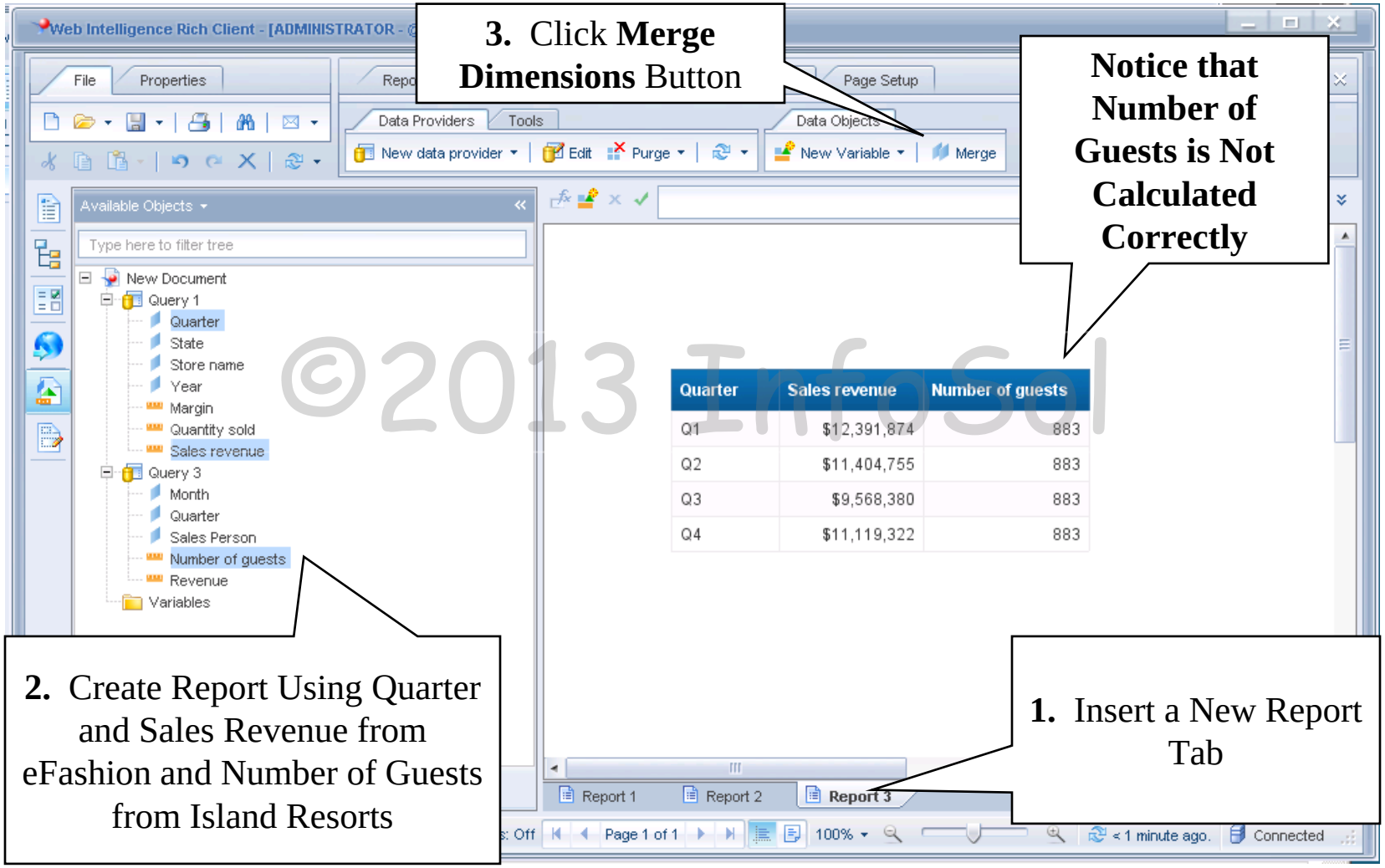
Using Multiple Queries: Merging Dimensions



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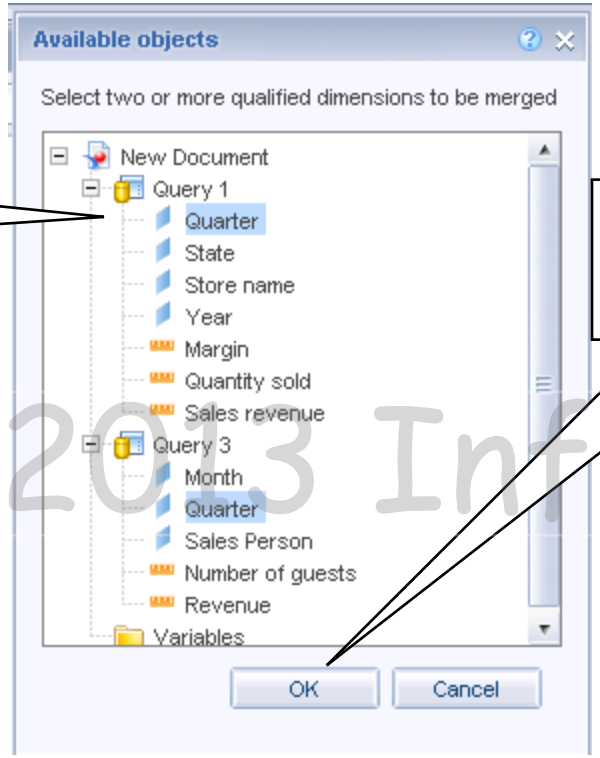
Using Multiple Queries: Merging Dimensions

4. Select **Quarter** from Both Queries



5. Click **OK**

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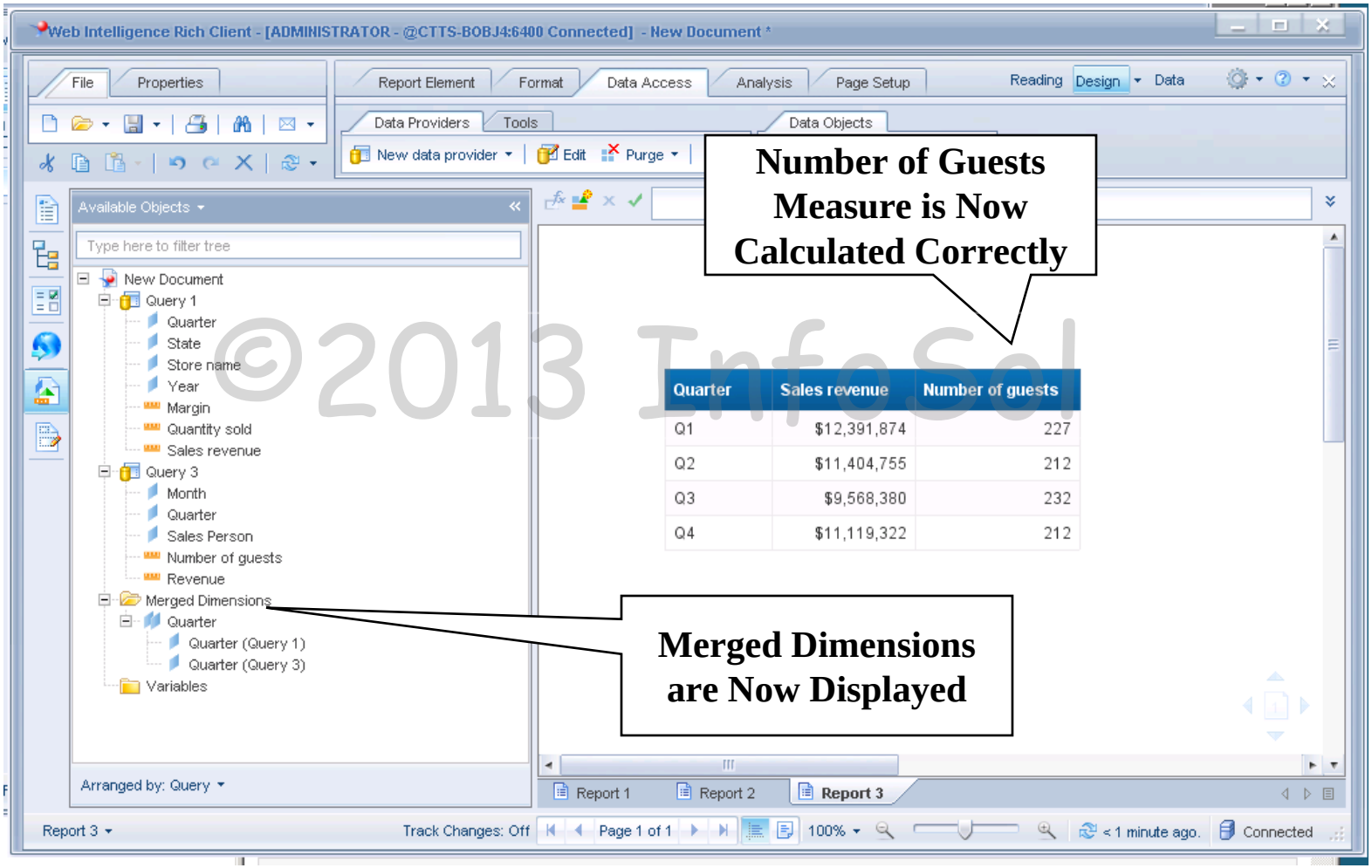
Using Multiple Queries: Merging Dimensions



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Multiple Queries: From Universe and External Data Source

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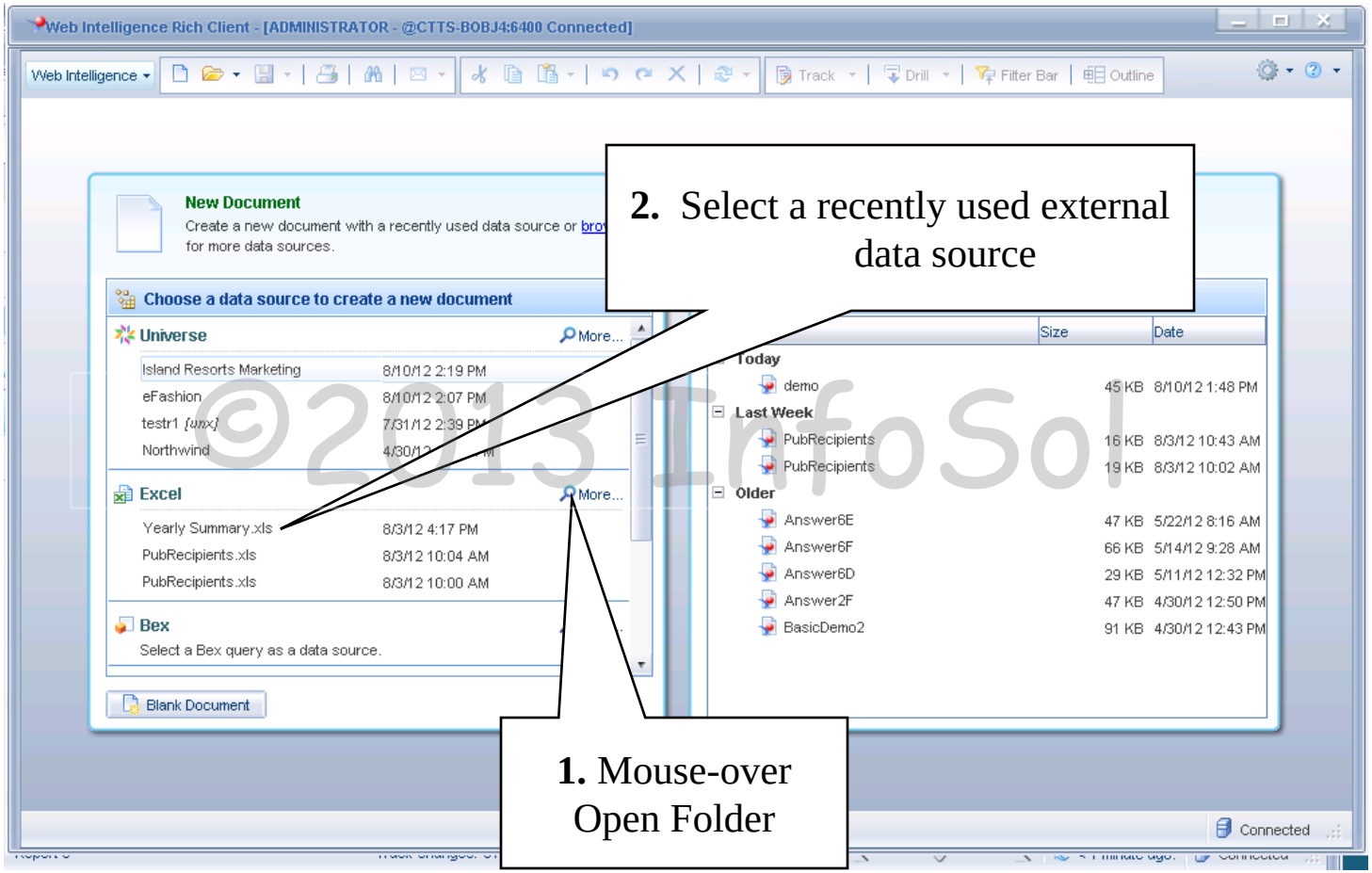
Multiple Queries: Universe and External Data Source



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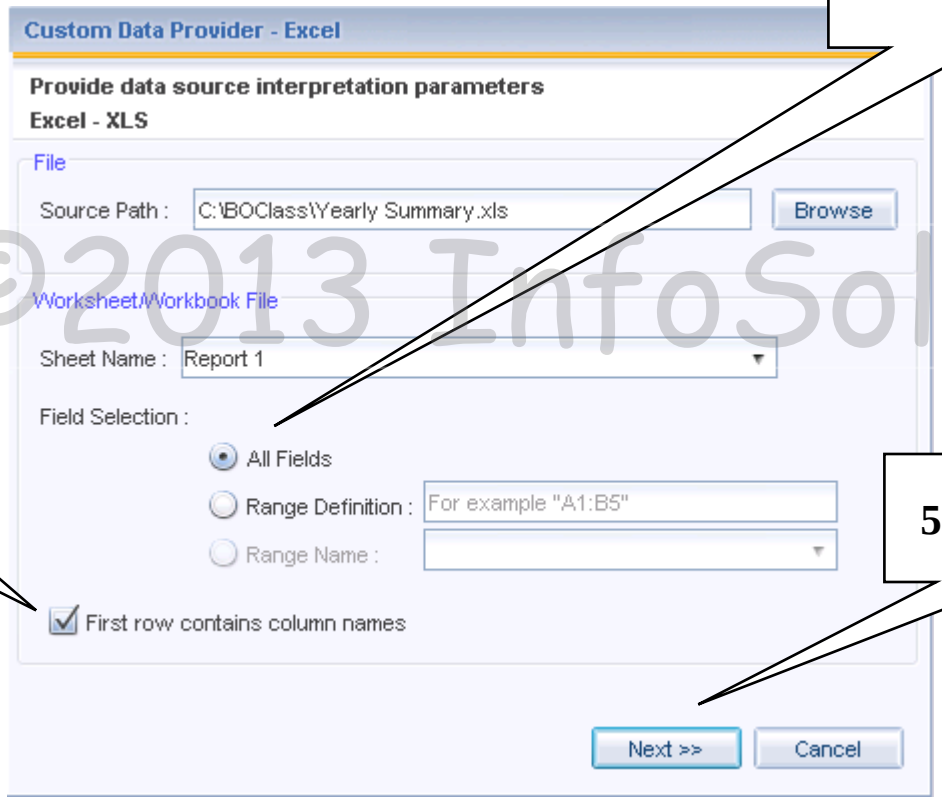
Multiple Queries: Universe and External Data Source

3. Select All Fields



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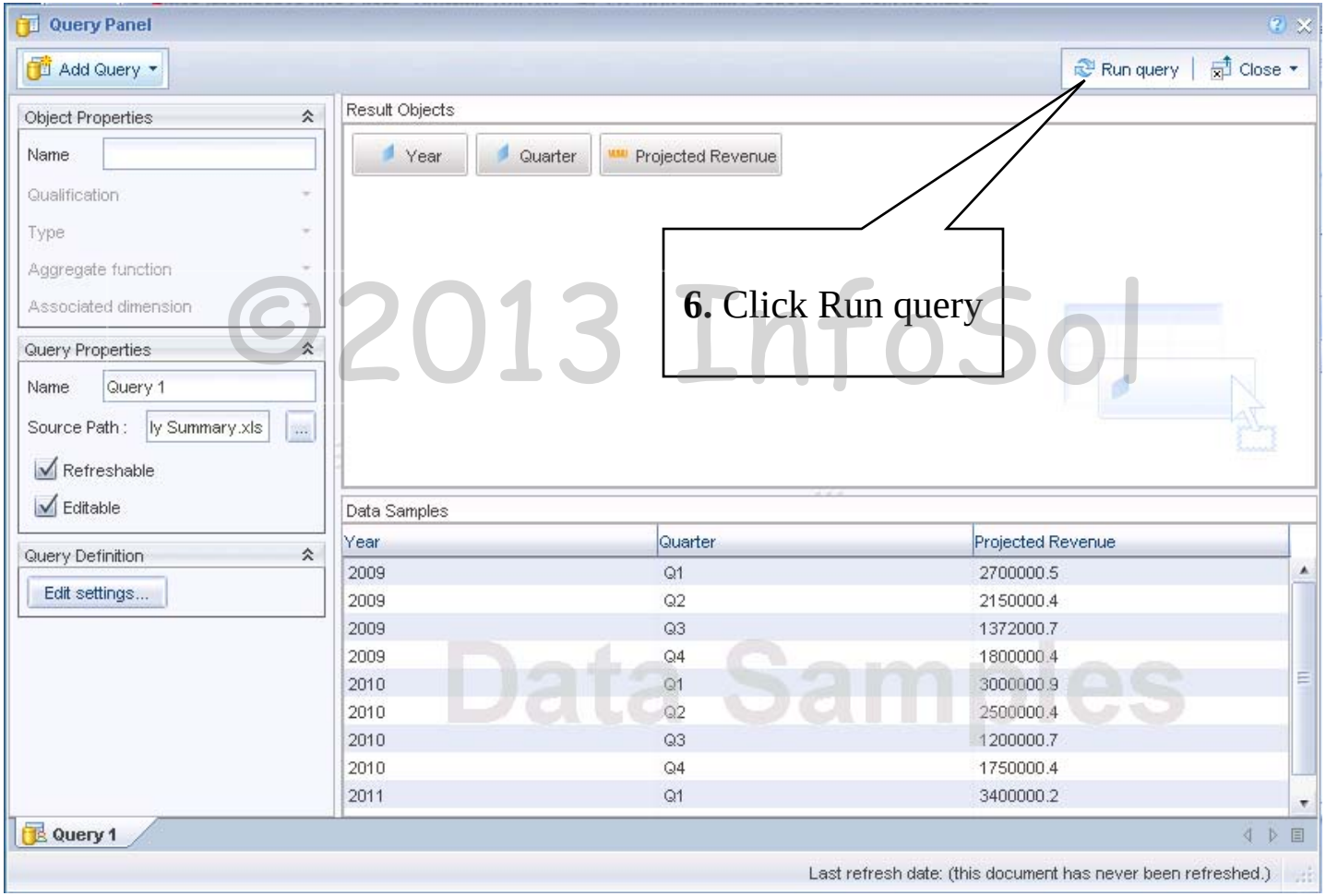
4. Check for 1st Row Contains Column Names

5. Click Next

Multiple Queries: Universe and External Data Source



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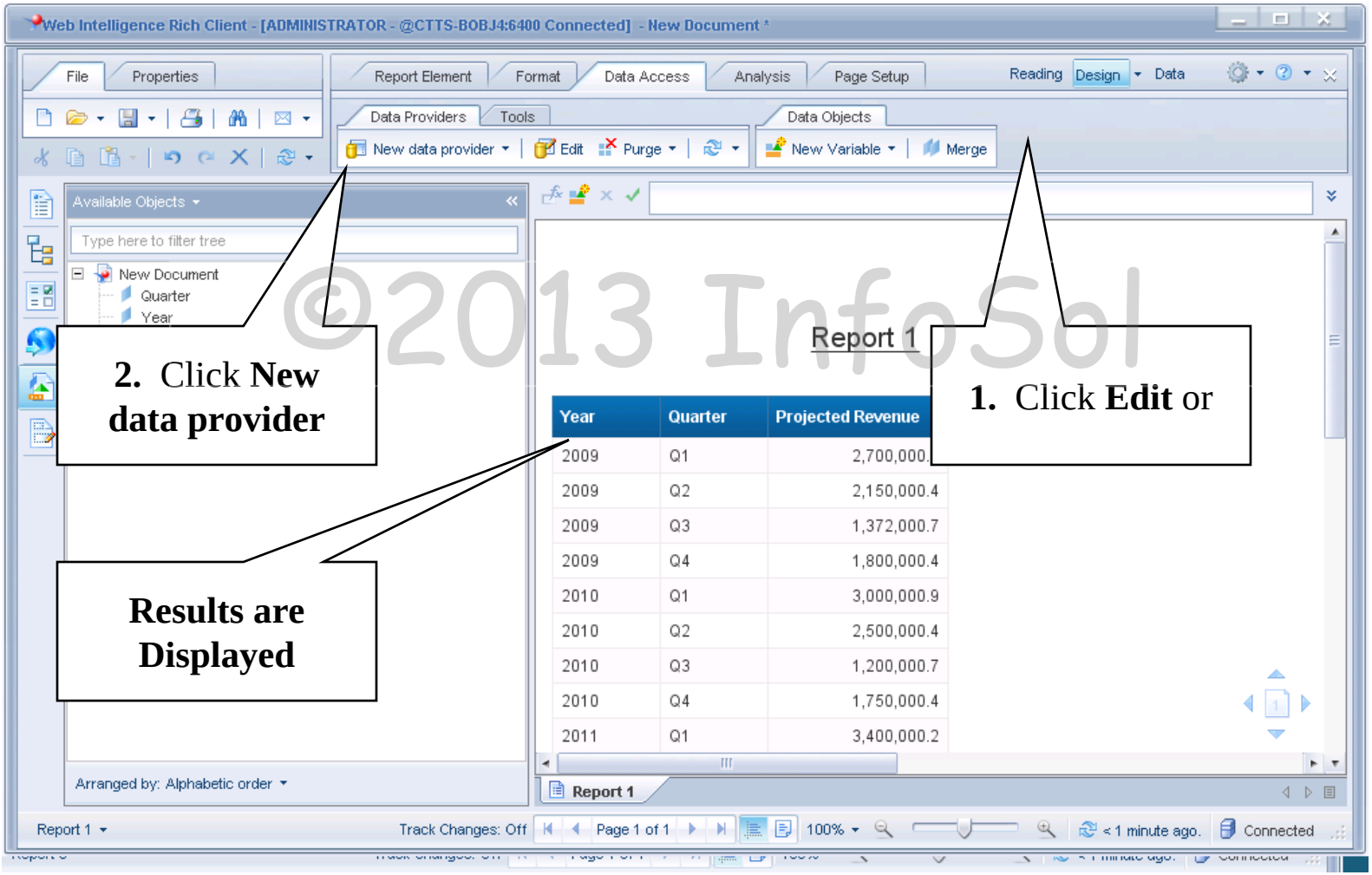

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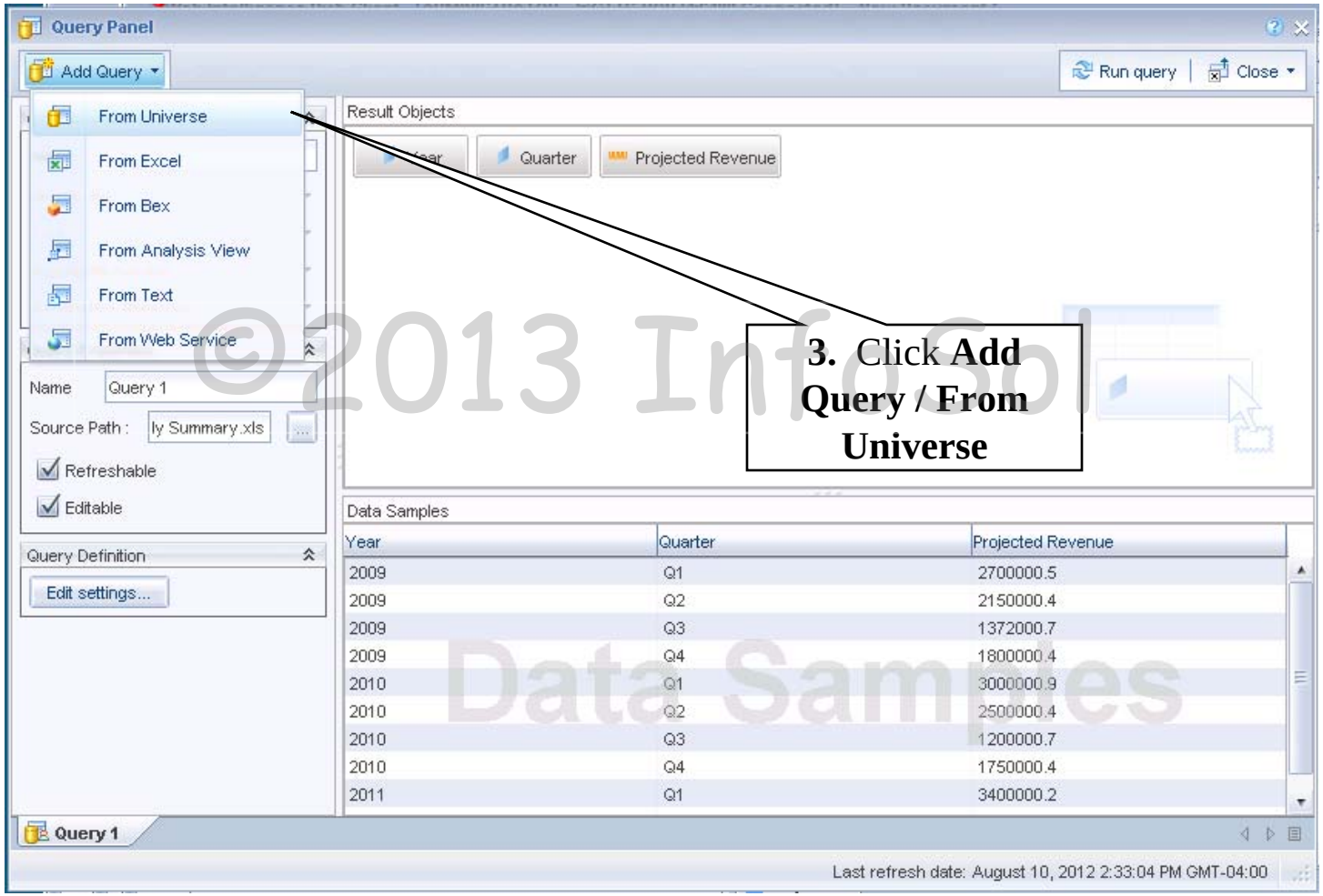
Multiple Queries: Universe and External Data Source



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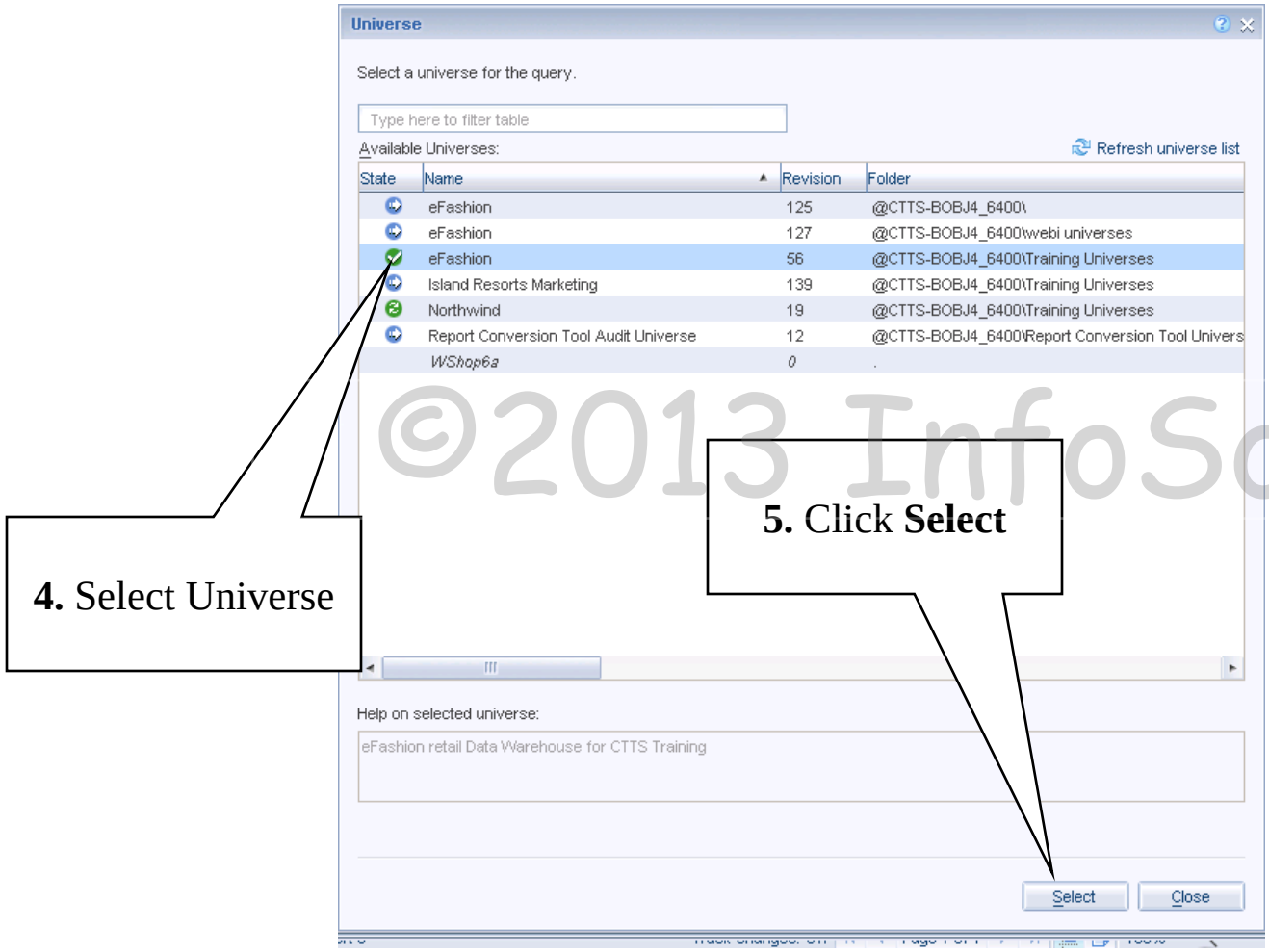

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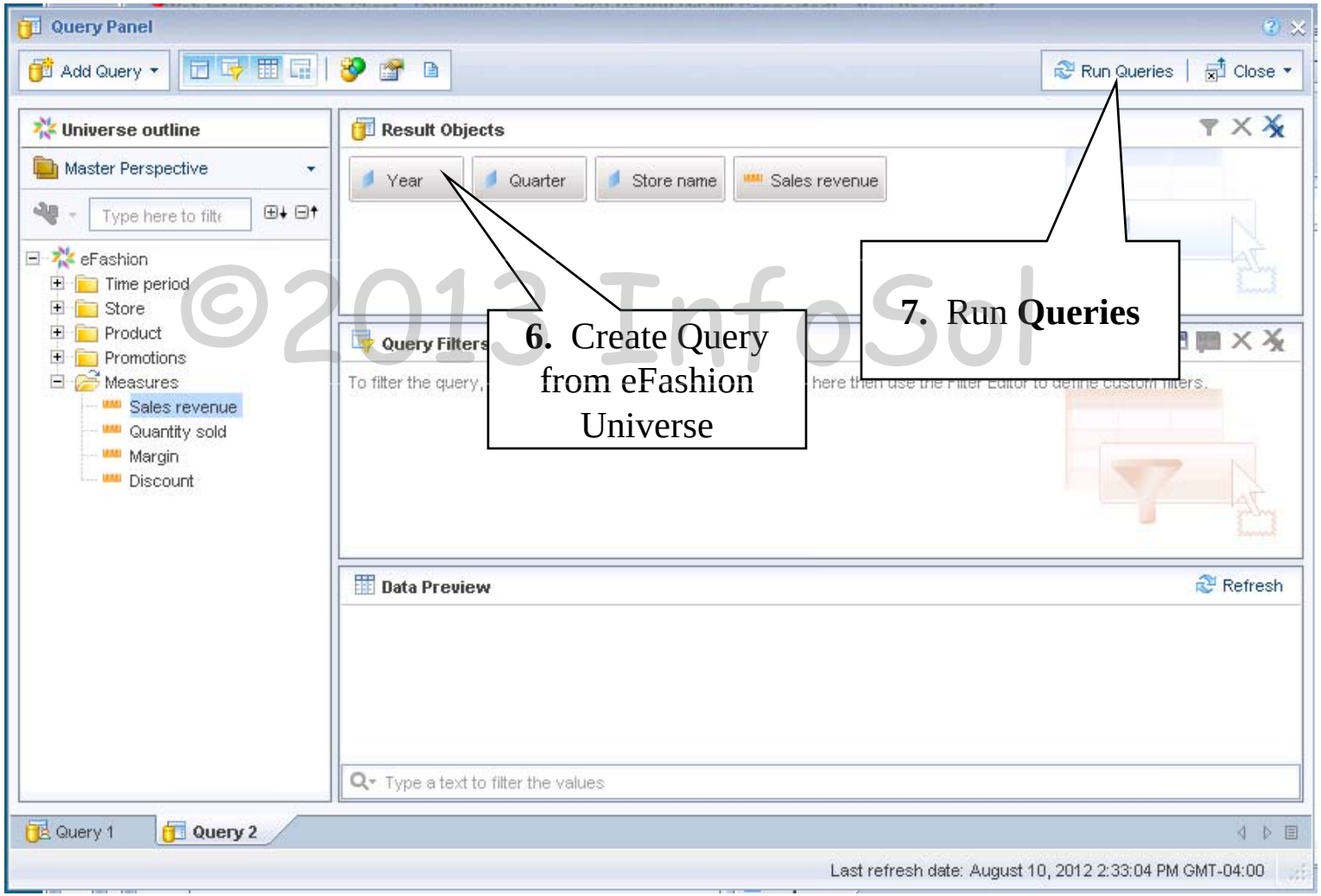
Multiple Queries: Universe and External Data Source



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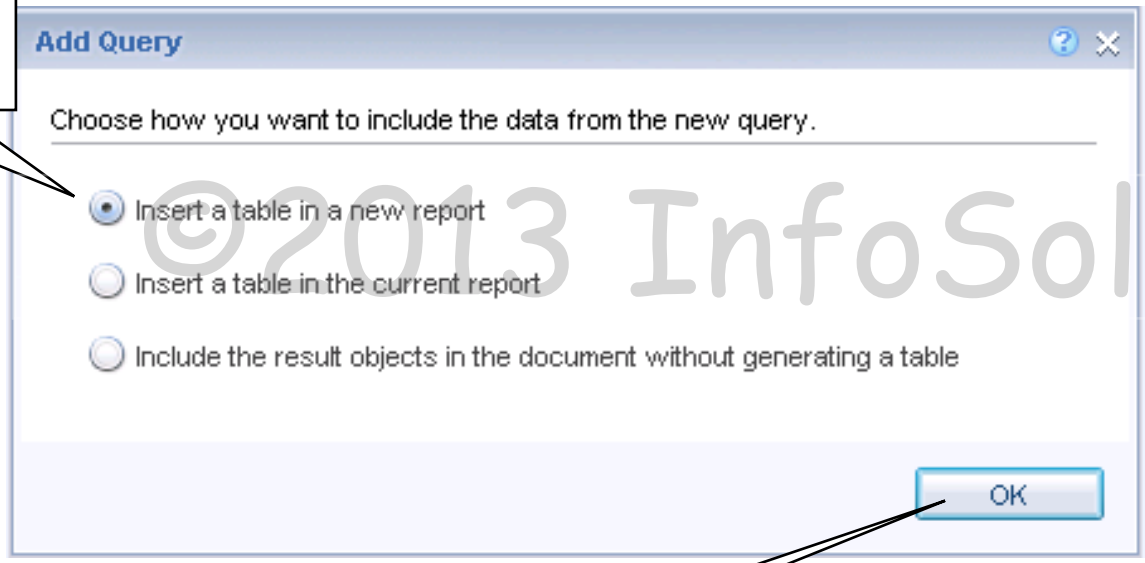
Multiple Queries: Universe and External Data Source

8. Choose Option to Insert Table in a New Report



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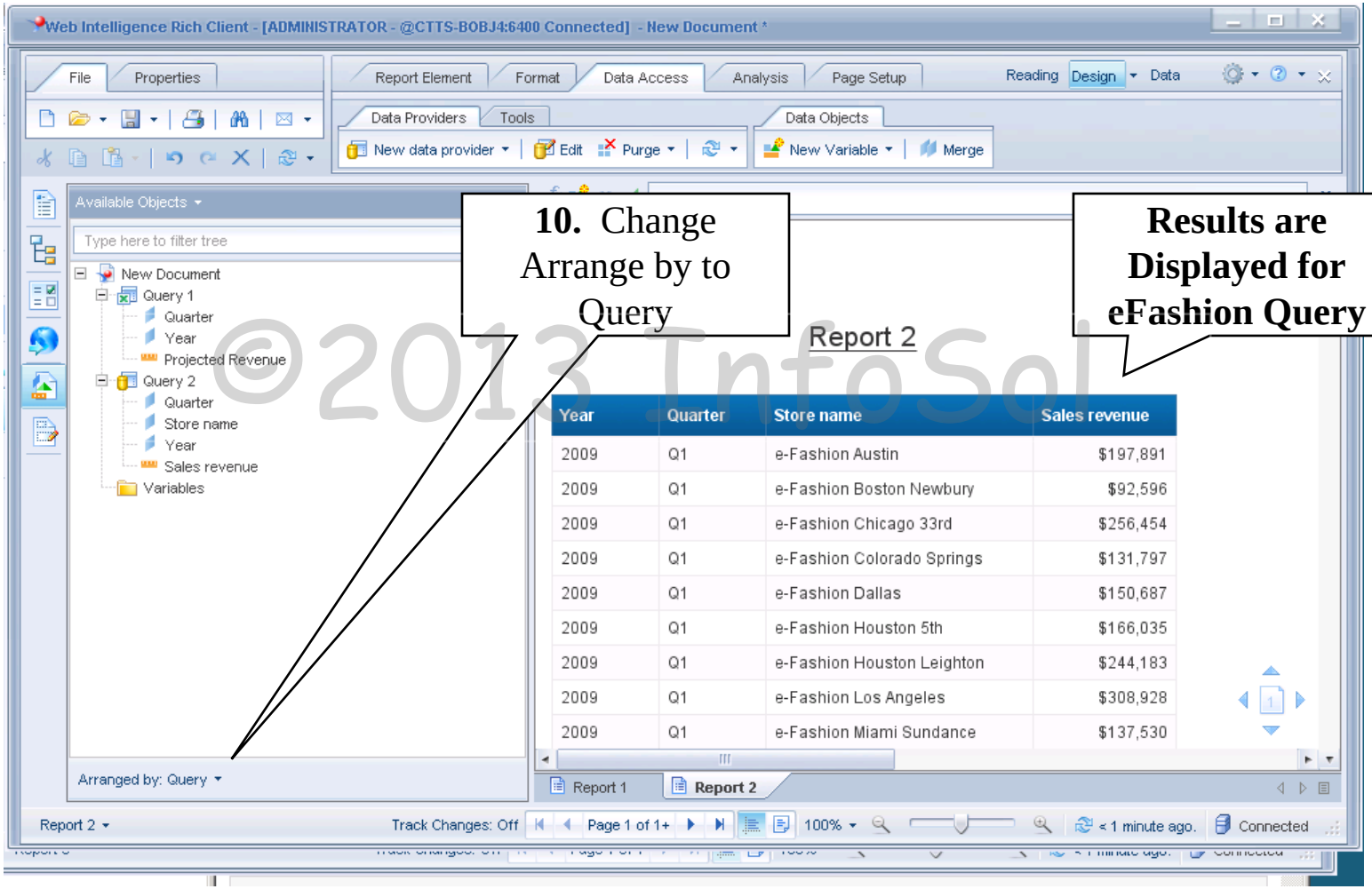
9. Click **OK**

Multiple Queries: Universe and External Data Source



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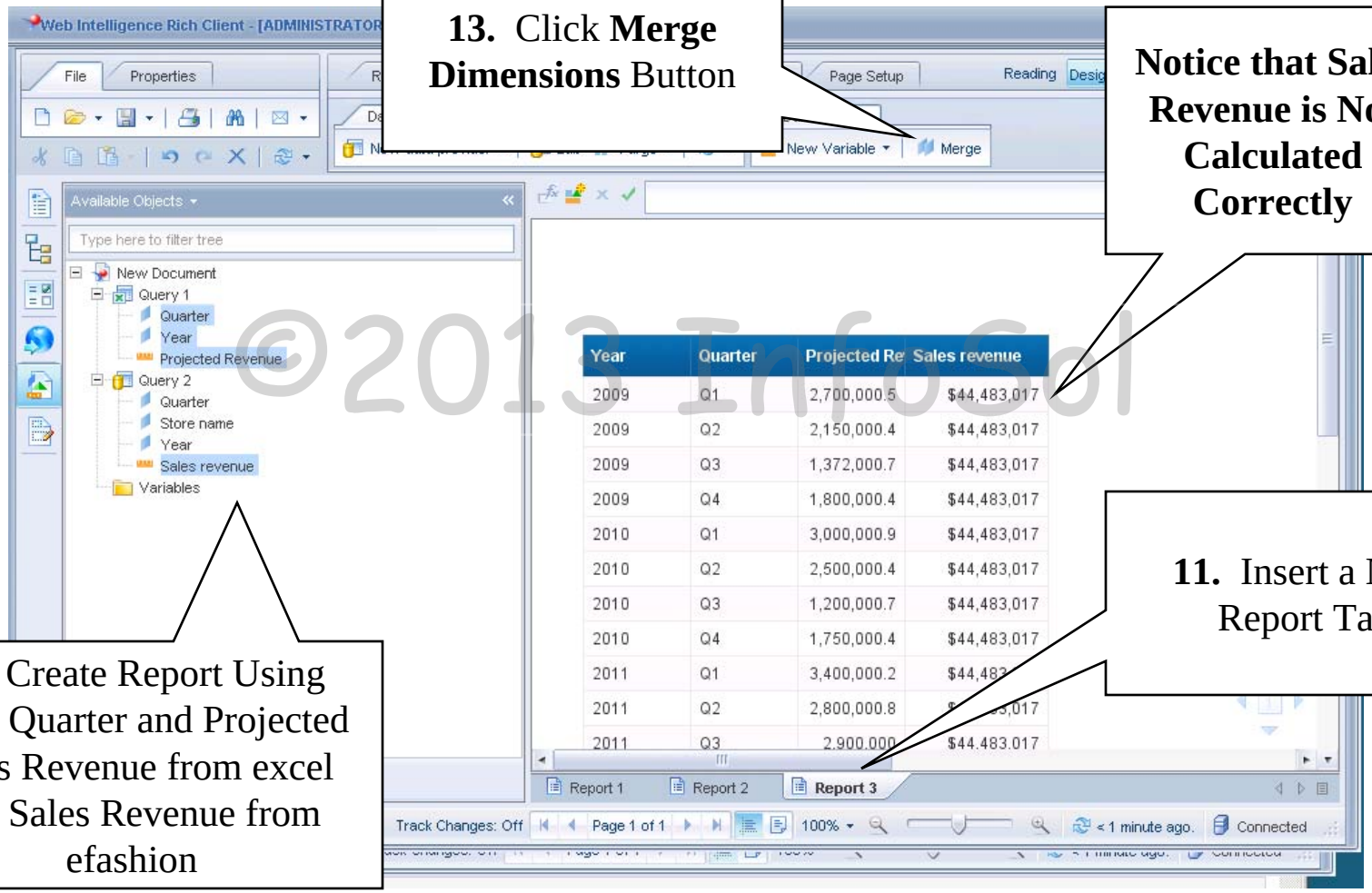

13. Click **Merge Dimensions** Button

Notice that Sales Revenue is Not Calculated Correctly

11. Insert a New Report Tab

12. Create Report Using Year, Quarter and Projected Sales Revenue from excel and Sales Revenue from efashion

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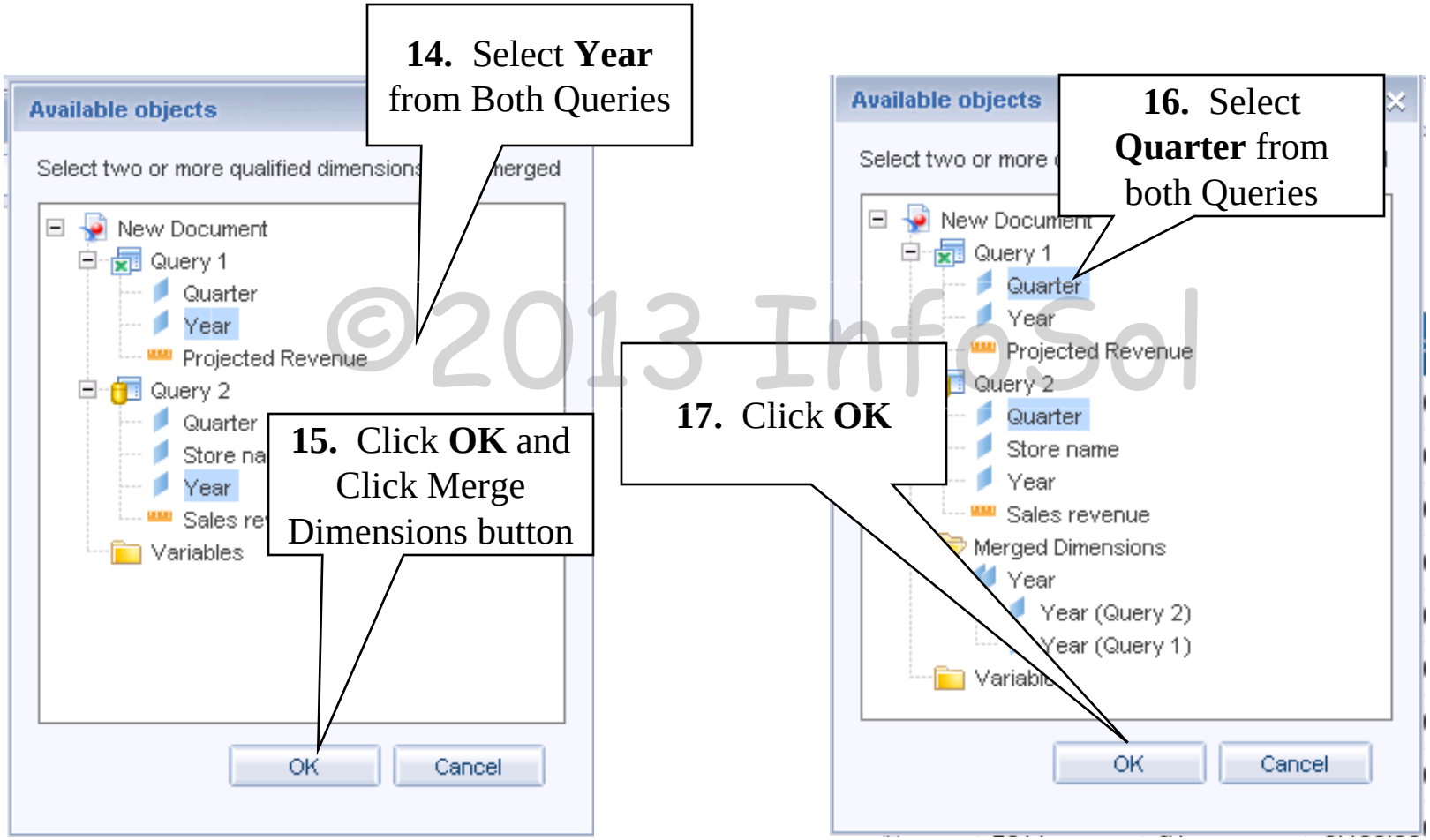
Multiple Queries: Universe and External Data Source



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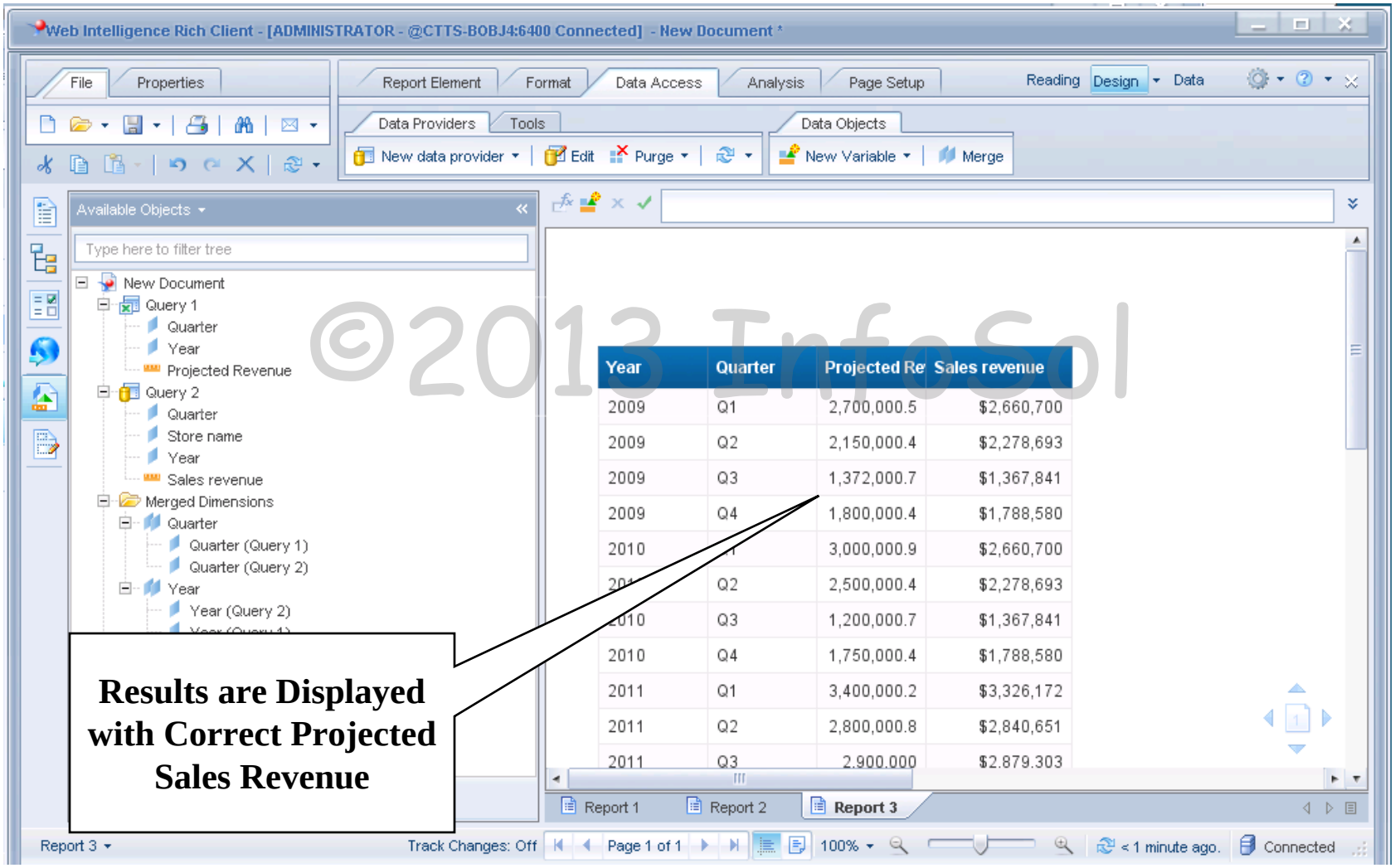

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Merging Dimensions

- Linking Data Providers
  - Any Number of Dimensions Objects Can be Merged
  - Can Only Merge Dimension Objects with Common Data Format
  - Many Data Providers Can be Linked within Document
  - Measures Aggregate to Common Dimension(s)
  - Local Variables Cannot be Linked/Merged
  - Data may be Case Sensitive
  - You must unmerge to remerge!

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Merging Common Universes

- Queries based on Same Universe are automatically linked by common queried dimensions
- Will need to Unmerge if report requires dimensions to not be merged

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Tips & Tricks:

- Can import and work locally
- Can import and store locally
- Can open/edit multiple documents
- Can bring in Excel spreadsheets
  - ◊ "Fix" data
  - ◊ Bring in as a new data provider

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Tips & Tricks:

- Can create Webi document with Excel and Universes
  - Export to BI Launch pad
  - Pure Webi users can edit Universe-based queries
  - Users can refresh Excel data providers (no edit capability)

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- Users can create Excel file and use as a “filter” file for other data provider sources within same document.

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- Merging Dimensions Guidelines
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