Peregrine

BI Portal 5.0 User's Guide

For Windows, AIX, and Solaris

PART NO: DBNI-5-EN01

Peregrine SYSTEMS

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Contents

About this Guide

The *BI Portal User's Guide* shows you how to use BI Portal to generate queries and reports.

This guide includes the following chapters:.

This chapter	Describes
Chapter 1	Introduction to the BI Portal user interfaces; key concepts of BI Portal
Chapter 2	Standard reports included in BI Portal
Chapter 3	How to work with standard and custom reports in BI Portal
Chapter 4	How to create ad hoc queries and create custom reports in BI Portal

Related Documentation

In addition to this guide, the following documentation is available for the BI Portal product and for WebIntelligence:

This manual…	Provides information on…
BI Portal Administrator's Guide	Security; data connection and transfer; configuring components after a custom installation; and performance tuning
BI Portal Installation Guide	Installing and configuring the application and Web servers for BI Portal.
BI Portal Release Notes	Last-minute enhancements, known issues, and closed issues.
OAA Platform Administration Guide	Installing and maintaining systems that use the Peregrine OAA platform.
WebIntelligence User's Guide	Describes how to use WebIntelligence for building and running queries, reporting, and analysis.

Documentation conventions

The following typographical conventions are used in this guide.

Text Formatting	Meaning
italics	Text that acts as a placeholder for information you will provide. Italics are also used for book titles and for emphasis.
sans serif font	Text that you type. Examples are filenames and URLs. This font is also used for samples of code and commands.
bold	Names of user interface elements. Examples are menu items and names (select **Open** from the **File** menu), button names (click **Accept**), and names of screens or dialogs (the **Server Manager** window).

Need more assistance?

For further information and assistance with this release, you can download documentation or schedule training.

Customer Support

For further information and assistance, contact Peregrine Systems' Customer Support at the Peregrine CenterPoint Web site.

To contact customer support:

1. In a browser, navigate to http://support.peregrine.com
2. Log in with your user name and password.
3. Follow the directions on the site to find your answer. The first place to search is the KnowledgeBase, which contains informational articles about all categories of Peregrine products.
4. If the KnowledgeBase does not contain an article that addresses your concerns, you can search for information by product; search discussion forums; and search for product downloads.

Documentation Web site

For a complete listing of current BI Portal documentation, see the Documentation pages on the Peregrine Customer Support Web.

To view the document listing:

1. In a browser, navigate to http://support.peregrine.com.
2. Log in with your login user name and password.
3. Click either **Documentation** or **Release Notes** at the top of the page.
4. Click the BI Portal link.
5. Click a product version link to display a list of documents that are available for that version of BI Portal.
6. Documents may be available in multiple languages. Click the Download button to download the PDF file in the language you prefer.

You can view PDF files using Acrobat Reader, which is available on the Customer Support Web site and through Adobe at http://www.adobe.com.

Important: Release Notes for this product are continually updated after each release of the product. Ensure that you have the most current version of the Release Notes.

Education Services Web Site

Peregrine Systems offers classroom training anywhere in the world, as well as "at your desk" training via the Internet. For a complete listing of Peregrine's training courses, refer to the following web site:

http://www.peregrine.com/education

You can also call Peregrine Education Services at +1 858.794.5009.

CHAPTER 1

Overview of BI Portal

The goal of Peregrine BI Portal is to help you access, analyze, report, and share information about your organization. BI Portal stores information in a database called the *Reporting Data Store* (RDS), and uses RDS data to create the reports and charts you want to see.

All BI Portal reports are based on data sets created by database queries that you can create, maintain, store, and execute. You can execute a query at any time to refresh the data set. You can copy queries, and you can change queries to produce new data sets.

BI Portal includes *standard* reports, whose data are stored in the BI Publishing server; and *custom* reports, whose data are stored in the Business Objects Repository.

This chapter contains the following sections that introduce you to BI Portal:

- *BI Portal workspaces* on page 10
- *Searching for reports* on page 13
- *Universes, classes, and objects* on page 14

BI Portal workspaces

There are two main workspaces in BI Portal:

- The *The BI Portal Reporting form*, which is displayed when you first log onto the BI Portal. Use the BI Portal Reporting form to run all the standard reports included with BI Portal, and to make basic changes to them.
- The *The WebIntelligence Reporting module*, which users who have permission, or *user capability*, can open from the BI Portal Reporting form. Use the WebIntelligence Reporting module to create custom queries and reports, and to make advanced changes to existing reports.

Note: User capabilities are discussed in the *BI Portal Administration Guide*.

The BI Portal Reporting form

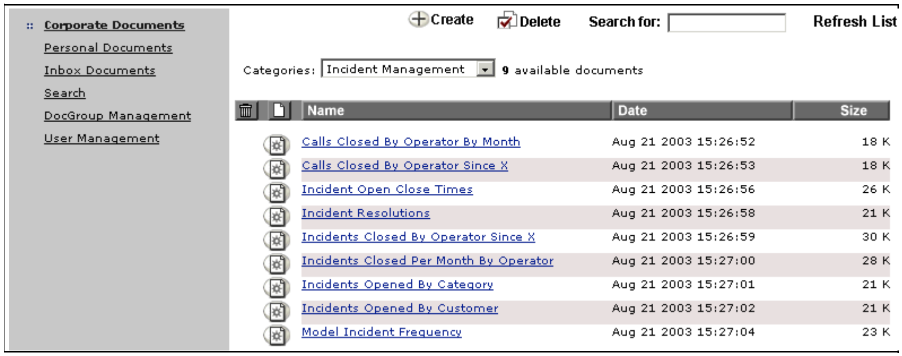
The BI Portal Reporting form includes a Navigator where you can:

- View the Corporate Documents list
- View the Personal Documents list
- View your Inbox Documents
- Search for reports by name

User who have BI_Admin user capability can also perform the following tasks. User capabilities and other issues related to security are discussed in the *BI Portal Administration Guide*.

- Open the DocGroup Management form
- Open the User Management form

The BI Portal Reporting form displays all the standard BI Portal reports. You can select a document group from the Document Group drop-down list to display only a subset of the standard reports:



Click a report to run it. After the report is displayed, you can perform the following tasks in the BI Portal Reporting form:

- Sort the report by column.
- Apply filters to limit the data displayed in the report
- Download the report from the BI Publisher to your local computer in Microsoft Excel or PDF format.
- Drill down into the report to examine its details more closely
- Refresh the report display.
- Edit the report. Click Edit to open the WebIntelligence Reporting module, where you make advanced changes to reports such as adding data fields, re-sizing columns, and adding charts.

Note: You can perform only simple reformatting tasks in the BI Portal Reporting form; you use the WebIntelligence Reporting module to perform all advanced report reformatting and editing tasks.)

- Save the report to your Personal Documents folder. When you save a report, it is stored in this folder. You can then regenerate, edit, remove, send, or publish the report. See the sections *Personal Documents* on page 29 and *Saving reports* on page 38 for more information.
- Publish the report to the Corporate Documents folder, where it can be shared by people throughout your organization. See *Publishing reports* on page 40 for more information.
- Schedule the report for automatic generation. See *Scheduling reports to run automatically* on page 36 for more information.

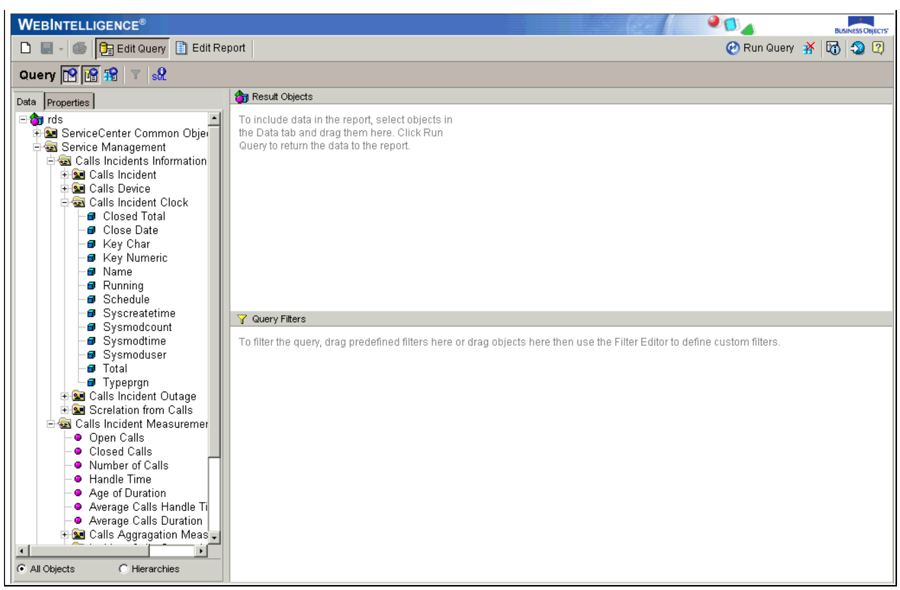
- Send the report to the Reporting Inbox of other users. See *Saving, sending, publishing, and exporting reports* on page 38 for more information.
- View and Print reports in PDF format.

If you have a user capability that allows it, click Create to open the WebIntelligence Reporting module and build custom reports that suit your requirements. User capabilities and other issues related to security are discussed in the *BI Portal Administration Guide*.

The WebIntelligence Reporting module

The WebIntelligence Reporting module is a powerful, easy-to-use tool that you use to create queries and reports, and to perform advanced edits on existing reports. WebIntelligence includes:

- A Query Manager (on the left) that displays the hierarchy of classes and objects that are available for inclusion in a query. (See *Universes, classes, and objects* on page 14 for more information.)
- A Result Objects pane that shows those objects that have been selected for a query.
- A Query Filters pane that displays filters that you can use to limit the results of a query to objects having specified attributes.



To use the WebIntelligence Reporting module you:

- Click Edit in the BI Portal Reporting form after you run a report; the WebIntelligence Reporting module opens and displays the report and its structure. Click Edit Query to display all the classes and objects in the RDS that are available for addition to your query and report.
- Click Create in the BI Portal Reporting form to create a custom query and report. The WebIntelligence Reporting module displays all classes and objects in the RDS that are available for inclusion in a new query and report.

The WebIntelligence Reporting module is a powerful, complex query and reporting tool that helps you access and examine your data quickly and easily. For complete information about WebIntelligence see the *WebIntelligence User's Guide*, which describes how to use WebIntelligence for building and running queries, reporting, and analysis.

For more information about the standard reports that BI Portal offers, see *Chapter 2, Standard Reports*. For more information about running and editing both standard and custom reports, see *Chapter 3, Working with Reports*. For more information about running ad hoc queries and creating custom reports, see *Chapter 4, Advanced reporting functions*.

Searching for reports

You can search for reports in BI Portal according to the following criteria:

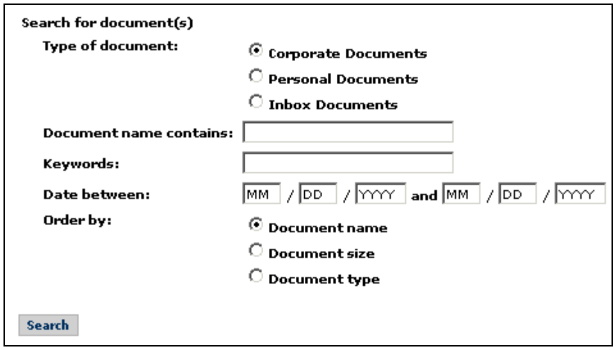
- Type of document: Corporate Documents, Personal Documents, and Inbox Documents.
- Document name. You can search for the entire name, or for documents whose name contains a phrase.
- Document keywords that you specify when you create publish reports. (See the section *Publishing reports* on page 40 for more information about keywords.)
- Dates when the reports were created

Further, you can sort the results of your search by document name, size, or type.

To search for reports

1 In the BI Portal Reporting form Navigator click **Search**.

The BI Portal Reporting form displays the following form where you specify both the criteria of your search and the order in which the results are sorted:


Search for document(s)
Type of document: Corporate Documents / Personal Documents / Inbox Documents
Document name contains:
Keywords:
Date between: MM / DD / YYYY and MM / DD / YYYY
Order by: Document name / Document size / Document type
Search

2 Enter your search criteria and click **Search**. The BI Portal Reporting form displays the results of your search.

Universes, classes, and objects

The information in the RDS database is stored in a single universe called *rds*. Whenever you run a standard report in BI Portal, modify an existing one, or create a custom report, you use the data in the rds universe.

The BI Portal hierarchy consists of *universes*, *classes*, and *objects*. A universe contains classes, which combine similar information into groups. The rds universe includes a class for common objects in ServiceCenter called ServiceCenter Common Objects, and other specific classes such as Service Management and Incident Management. Classes are similar to folders; they are represented in the user interface by a folder icon. Classes can contain other classes; they can also contain objects.

Objects are groups of related attributes. In BI Portal there are three types of objects, which are represented in the WebIntelligence Reporting module by three different icons:

Object type	Description	Icon
Dimension object	Non-quantifiable attributes such as Name, Company, and Location	
Measurement object	Quantifiable attributes, which can be included in totals, averages, and other metrics.	
Condition object	Objects used to create filters	

2 CHAPTER Standard Reports

Peregrine BI Portal includes twenty standard reports that provide a wide variety of information about your organization. This chapter describes the standard reports that BI Portal offers.

In addition to the standard reports, you can use WebIntelligence Reporting module to modify the standard reports, and to create custom reports that suit the specific requirements of your business.

For more information about creating, saving, running, and publishing standard and custom reports, see *Chapter 3, Working with Reports*. For more information about running ad hoc queries and creating custom reports, see *Chapter 4, Advanced reporting functions*.

Business Intelligence standard reports

BI Portal standard reports fall into five categories:

- Change Management
- Incident Management
- Inventory Management
- Service Management

Standard Reports for Change Management

These reports provide information that helps you manage change requests in your organization.

Task Overview

Description:	Format:
Shows tasks grouped by Priority, Requestor, and Assignee.	Tabular report

Changes by Planned Start and Priority

Description:	Format:
Shows change request details sorted by Planned Start Date and Priority.	Tabular report

Currently Open Changes

Description:	Format:
Shows all open change requests, including the status of each change request and information about relevant contacts.	Detailed tabular report

Hours Worked on Closed Changes by Assignee

Description:	Format:
Shows the trend of hours worked on change requests by each operator. Only closed change requests are included.	Tabular report and line chart

Standard reports for Incident Management

These reports provide information that helps you manage service call incidents in your organization.

Incidents Closed per Month by Operator

Description:	Format:
Shows a month-to-month count of all incidents closed by each operator.	Tabular report and line chart

Incidents Closed by Operator Since X

Description:	Format:
Shows a count of incidents closed by each help desk operator between a specified date and the current date. The counts are summarized by incident severity.	Vertical bar chart by operator and severity. Tabular report, separated by operator, includes totals by operator and a grand total.

Incidents Opened by Category

Description:	Format:
Shows the percentage of incidents logged in the system by Incident Category, in pie chart format.	Pie chart

Incident Resolutions

Description:	Format:
Shows the percentage of incidents solved by each Resolution Code.	Pie chart

Incident Open Close Times

Description:	Format:
Shows a master list of times when incidents were opened, closed, and last updated. Also shows elapsed times for all incidents.	Report, including average elapsed time.

Incidents Opened by Customer

Description:	Format:
Shows the percentage of Incidents created by each client company, in pie chart format.	Pie chart

Standard reports for Inventory Management

These reports provide information that helps you manage assets in your organization.

Asset Categorization

Description:	Format:
Shows a list of all assets in the system, broken down by asset type.	Report

Unavailable Assets

Description:	Format:
Shows all Assets that are currently unavailable due to problems or maintenance.	Report, separated by physical location

Recurring Outages

Description:	Format:
Shows Assets that historically have the most "down" time.	Report

Standard reports for Service Management

These reports provide information that helps you manage service calls in your organization.

Average Call Handle Time by Category

Description:	Format:
Displays a chart showing the average amount of time (in minutes) required to handle calls in each category.	Horizontal bar chart

Average Call Handle Time by Company and Dept

Description:	Format:
Displays a chart showing the average amount of time (in minutes) required to handle calls from each customer department.	Horizontal bar chart, with a separate chart for each company

Average Call Handle Time by Operator

Description:	Format:
Displays a chart showing the average amount of time (in minutes) required by each service technician to handle calls.	Horizontal bar chart and report

Calls Closed Since X Per Operator by Severity

Description:	Format:
Shows the number of calls closed since the user-specified date for each support technician (owner), sorted by severity.	Stacked vertical bar chart. Report, separated by owner

First Call Resolution Report by Operator

Description:	Format:
Shows all calls in the system and all related incidents. Calls without incidents are credited with a First Call Resolution status.	Report, separated by operator. Includes a first call resolution rate for each operator.

Calls and Incidents Opened by Department

Description:	Format:
Shows a count of all calls and incidents in the system, broken down by company and department of origin.	Report, separated by department. Includes call and incident counts for each department and for the whole company.

Open Calls by Assignment Group

Description:	Format:
Shows a list of assignment groups with the most currently open calls.	Vertical bar chart and a report that includes a grand total for all groups.

3 CHAPTER Working with Reports

Peregrine BI Portal offers two types of reports: standard reports, which are pre-defined reports included with BI Portal; and custom reports, which you design and save using the WebIntelligence Reporting module.

Overview of reporting tasks

All reports, both standard and custom, are assigned to a document group. All of the standard reports reside in the one of the following document groups:

- Change Management
- Incident Management
- Inventory Management
- Service Management

Before you create custom reports, you create document groups for them. After you create custom reports, you assign them to your document groups.

Note: For more information about standard reports in BI Portal, see *Chapter 2, Standard Reports*. For more information about creating ad hoc queries and custom reports, see *Advanced reporting functions* on page 43.

This chapter describes how to:

- Create document groups. (See page 27.)
- Run reports. (See page 29.)
- Modify standard and custom reports. Here you can change both the content and the format of the report. (See page 31.)
- Schedule reports to run automatically. (See page 36.)
- Save reports to your Personal Documents folder. (See page 38.)
- Send reports to other users. (See page 39.)
- Publish reports to the Corporate Documents folder. (See page 40.)
- Export reports to an Excel spreadsheet or to a PDF document. (See page 41.)

Important: The WebIntelligence Reporting module is very complex. It includes both an online help system and a *WebIntelligence User's Guide*, which will enable you to take full advantage of its rich functionality. A comprehensive discussion of the WebIntelligence Reporting module is beyond the scope of this guide. This chapter presents only an introduction to the functionality of the WebIntelligence Reporting module.

About document groups

All reports are assigned to document groups, which are displayed in the BI Portal Reporting form in the Document Groups list.

Standard reports are assigned to pre-defined document groups.

Custom reports are assigned to user-defined document groups. Before you create a custom report, you create at least one new document group; after you create the report, you assign it to one of your user-defined document groups.

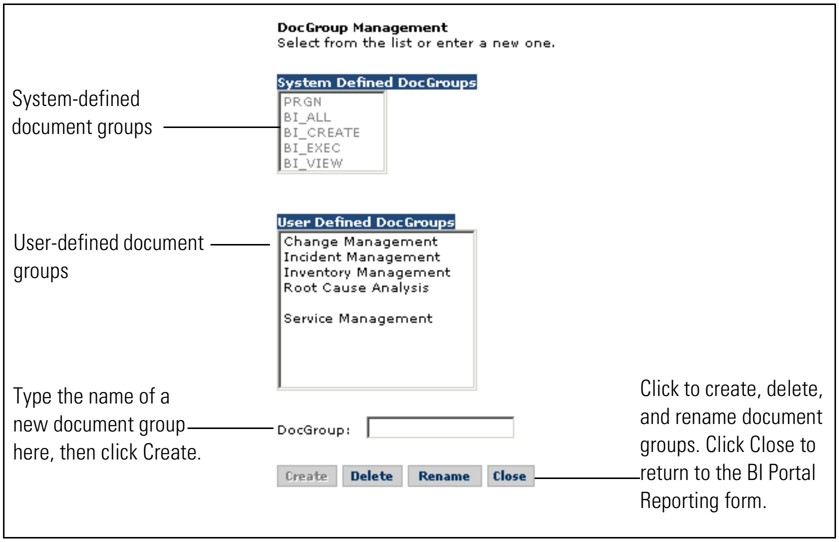
To limit the number of reports that are displayed in the BI Portal Reporting form, choose a document group from the Document Groups list. Only reports in that document group are displayed.

If you modify BI Portal standard reports or create custom reports, you can assign them either to the Corporate document group or to a user defined document group.

To create, update, or delete document groups:

1. In the BI Portal Reporting form click **DocGroup Management** in the Navigator.

The DocGroup Management form shows document groups, both the default System-Defined DocGroup and the User Defined DocGroups. You cannot edit the default System-Defined DocGroup. Users who have BI_Admin user capability can create, delete, and modify document groups in the User Defined DocGroups.



2 Type the name of a document group that you want to add in the **DocGroup** field, and click **Create**.

The message “Category has been successfully created” appears at the bottom of the form, and the new category is displayed in the list.

3 To change a category’s name, take these steps:

a Click the category in the list to display its name in the DocGroup field.

b Edit the name in the DocGroup field, and then click **Rename**.
The message “*Group* <groupName> *has been renamed successfully. Category has been renamed successfully*” is displayed, and the name is changed in the list. If you do not have user capability to change the document group name, the message “*Could not rename category. Check that you have rights or a valid name*” is displayed.

4 To delete a category, click the name in the list to display it in the DocGroup field, and click **Delete**

The message “*status: Group* <groupName> *has been removed succesfully.Category has been successfully deleted*” is displayed at the bottom of the form, and the name is no longer displayed in the DocGroup list.

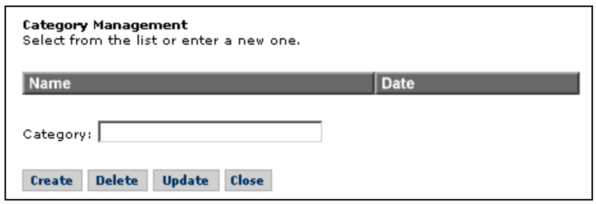
5 Click **Close** when you finish working with categories.

Personal Documents

Whenever you save a report, it is stored in your Personal Documents folder. To open your personal documents folder, click Personal Documents in the BI Portal Reporting form Navigator. Your documents are listed according to categories that you create.

Managing Personal Document Categories

You manage Personal Document categories in the Category Management form. Click **Categories** to open the Category Management form:



To create a Personal Documents category:

1. Enter the name of the category you want to create
2. Click **Create**. The category now appears in the Category Management list.

To change a Personal Documents category:

1. Click the category in the Category Management list. Its name is displayed in the Category**:** field.
2. Change the name of the category.
3. Click **Update**; the new name appears in the Category Management list.

To delete a Personal Documents category:

1. Click the category in the Category Management list. Its name is displayed in the **Category:** field.
2. Click **Delete**. The category is no longer displayed in the Category Management list.

Running reports

The following procedure describes how to run a standard or custom report.

There are several facets of running a report. This section describes all of them.

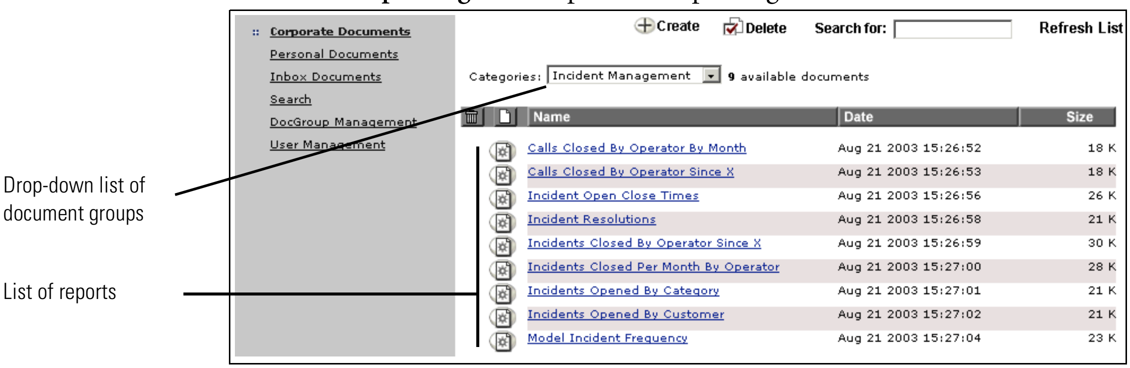
- To run a report, see *Running reports* on page 29.
- To drill down into the details of a generated report, see *Changing the report's depth* on page 34.
- To format a generated report, see *Reformatting reports* on page 36.

Running standard or custom reports

Generating reports

To generate a standard or custom report:

1. Log in to BI Portal.
2. Click the **Reporting** tab to open the Reporting form:



3. Find the report you want to run by doing one of the following:
   - Choose any report from the list.
   - To narrow your search, choose a type of report from the DocGroup drop-down list; only reports in that document group are displayed. For example, choose **Incident Management** to view only those reports associated with incidents.
   - Click **Inbox Documents** to see only reports in that folder.
   - Click **Personal Documents** to see only reports in that folder.

   Note: To see information about a report before you run it, click the Document icon to the left of the report name. Read the information that appears, and then click **Back to Document List**.

4. Click a report to create it.

For more information about editing reports see the section, *Editing reports* on page 31.

Editing reports

After you run a report, you can change it in two ways: in the BI Portal Reporting form and in the WebIntelligence Reporting module.

Editing a report in the BI Portal Reporting form

You can perform *only* the following report editing tasks in the BI Portal Reporting form:

- Apply a filter to the report
- Sort the report by column in ascending or descending order
- Drill down into the report to examine its details.

Applying a filter to a report

Follow these steps to add a filter to a report:

To filter a report in the BI Portal Reporting form:

1. Run the report.
2. Place the cursor over a column in the table. A popup shows two options: **Filter By** and **Sort**.
3. Click **Filter By** to display a Dynamic Filters list that includes all values shown in that column of the report.
4. Choose the values you want to see. To choose multiple values press **Ctrl** and click values.
5. Click **Apply**. The report now displays only records that include the values you chose.

Sorting report data

Follow these steps to sort the data in a report.

To sort a report in the BI Portal Reporting form:

1. Run the report.
2. Place the cursor over a column in the table. A popup shows two options: **Filter By** and **Sort**.

3 Click **Sort** and choose a sort order, either **Default**, **Ascending**, or **Descending**.

4 The report is now sorted in the specified order.

Drilling into a report

Follow these steps to examine the data in a report in detail:

To drill into a report to examine its contents in detail:

1 Run the report.

2 Click **Drill**.

3 The report is refreshed, and items in the report that contain detailed information are underlined.

4 Place the cursor over the report and click; or choose a drill-down option from the pop-up window. For example, click "Drill down to mtbf."

5 A report is displayed that shows more detailed information.

6 To end the drill-down, click **End Drill**.

If you modify a standard report and save it in this way, it becomes a custom report.

Editing a report in the WebIntelligence Reporting module

To edit a report:

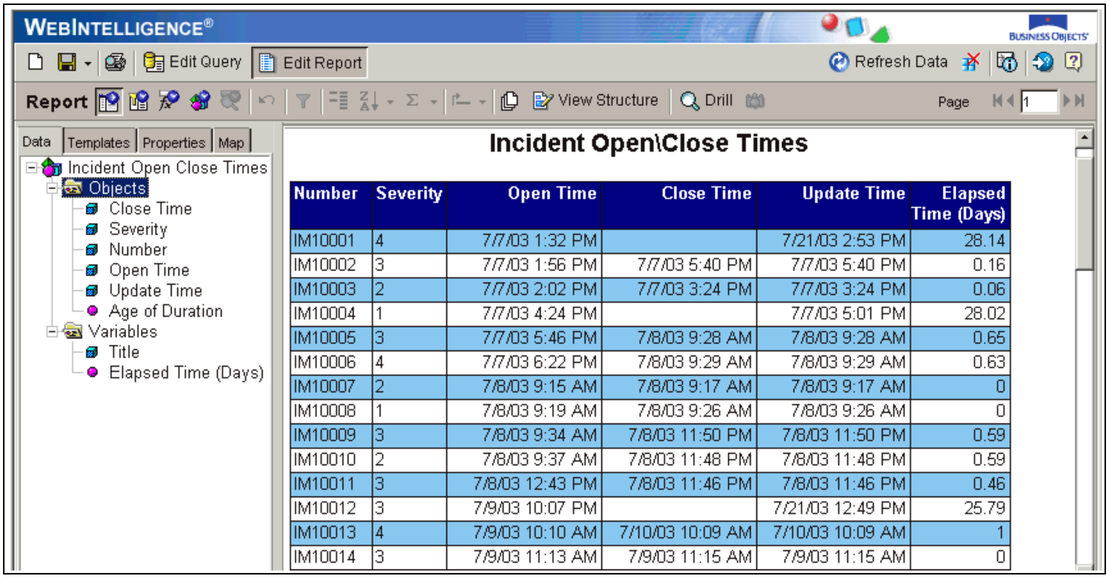
1 Run a report in the BI Portal Reporting form. The following example shows the Incident Open/Close Times
report:

Download Drill Refresh Edit Save Publish Schedule Send View in PDF Maximiz

Incident Open\Close Times

Number	Severity	Open Time	Close Time	Update Time	Elapsed Time (Days)
IM10001	4	7/7/03 1:32 PM		7/21/03 2:53 PM	28.14
IM10002	3	7/7/03 1:56 PM	7/7/03 5:40 PM	7/7/03 5:40 PM	0.16
IM10003	2	7/7/03 2:02 PM	7/7/03 3:24 PM	7/7/03 3:24 PM	0.06
IM10004	1	7/7/03 4:24 PM		7/7/03 5:01 PM	28.02
IM10005	3	7/7/03 5:46 PM	7/8/03 9:28 AM	7/8/03 9:28 AM	0.65
IM10006	4	7/7/03 6:22 PM	7/8/03 9:29 AM	7/8/03 9:29 AM	0.63
IM10007	2	7/8/03 9:15 AM	7/8/03 9:17 AM	7/8/03 9:17 AM	0
IM10008	1	7/8/03 9:19 AM	7/8/03 9:26 AM	7/8/03 9:26 AM	0
IM10009	3	7/8/03 9:34 AM	7/8/03 11:50 PM	7/8/03 11:50 PM	0.59
IM10010	2	7/8/03 9:37 AM	7/8/03 11:48 PM	7/8/03 11:48 PM	0.59
IM10011	3	7/8/03 12:43 PM	7/8/03 11:46 PM	7/8/03 11:46 PM	0.46
IM10012	3	7/9/03 10:07 PM		7/21/03 12:49 PM	25.79
IM10013	4	7/9/03 10:10 AM	7/10/03 10:09 AM	7/10/03 10:09 AM	1

2 Click **Edit** to open the WebIntelligence Reporting module., which opens with the **Edit Report** tab selected:



Number	Severity	Open Time	Close Time	Update Time	Elapsed Time (Days)
IM10001	4	7/7/03 1:32 PM		7/21/03 2:53 PM	28.14
IM10002	3	7/7/03 1:56 PM	7/7/03 5:40 PM	7/7/03 5:40 PM	0.16
IM10003	2	7/7/03 2:02 PM	7/7/03 3:24 PM	7/7/03 3:24 PM	0.06
IM10004	1	7/7/03 4:24 PM		7/7/03 5:01 PM	28.02
IM10005	3	7/7/03 5:46 PM	7/8/03 9:28 AM	7/8/03 9:28 AM	0.65
IM10006	4	7/7/03 6:22 PM	7/8/03 9:29 AM	7/8/03 9:29 AM	0.63
IM10007	2	7/8/03 9:15 AM	7/8/03 9:17 AM	7/8/03 9:17 AM	0
IM10008	1	7/8/03 9:19 AM	7/8/03 9:26 AM	7/8/03 9:26 AM	0
IM10009	3	7/8/03 9:34 AM	7/8/03 11:50 PM	7/8/03 11:50 PM	0.59
IM10010	2	7/8/03 9:37 AM	7/8/03 11:48 PM	7/8/03 11:48 PM	0.59
IM10011	3	7/8/03 12:43 PM	7/8/03 11:46 PM	7/8/03 11:46 PM	0.46
IM10012	3	7/9/03 10:07 PM		7/21/03 12:49 PM	25.79
IM10013	4	7/9/03 10:10 AM	7/10/03 10:09 AM	7/10/03 10:09 AM	1
IM10014	3	7/9/03 11:13 AM	7/9/03 11:15 AM	7/9/03 11:15 AM	0

3 You can drag and drop objects to rearrange columns in the report; right-click to delete columns and rows, clear cell contents, reformat the cell, and more.

Important: The WebIntelligence Reporting module offers extensive functionality that is beyond the scope of this user guide. To learn more about the WebIntelligence Reporting module, click **Help**, and read the *InfoView User's Guide* that opens. Or refer to the *WebIntelligence User's Guide*.

4 Click the **Edit Query** tab to change the query on which the report is based. Here you specify information that is included in the report.

5 Click the **View SQL** button to open the SQL Viewer, where you can examine the SQL that will be executed when you run the query. Click **Close** in the SQL Viewer when you are satisfied with the SQL code.

6 Click **Run Query** Run Query to execute the query and generate the report.

7 While the report is displayed you can click **View Structure** View Structure to examine its structure. Click **View Results** View Results to return to the report.

8 To create a section in the report, drag and drop an object onto the report panel, above the report itself.

9 You can click **Save**, and choose a location to save the report.

To publish or send the report to other users, see *Saving, sending, publishing, and exporting reports* on page 38.

Changing the report's depth

After you generated a report, you can examine the data in its fields more closely. This is called drilling down into the report.

Drilling and the object hierarchy

There are hierarchies defined in the universe that are applied to most attributes on the reports. When a report is displayed in a tabular format, clicking the Drill link lets fields that are in hierarchies to be drilled downward or upward. An arrow next to a field on the report indicates that the user can drill up or down on that field within the hierarchy.

For example, if a report contains an Asset Tag column, clicking the Drill link displays an "up" arrow next to the column heading. Clicking the "up" arrow causes the field to change to the attribute that is one level higher within the hierarchy (in this case, Subtype). Clicking the Asset Tag link itself causes the field to change to the attribute that is one level lower within the hierarchy (in this case, Status).

To view the entire hierarchy of objects and attributes in the rds universe, click Create in the BI Portal Reporting form to open the WebIntelligence Reporting module. The entire rds hierarchy is displayed in the Query Manager on the left side of the WebIntelligence Reporting module.

To drill down into a report:

1 Run a report in the BI Portal Reporting form.

2 Click **Drill** to drill down. The following example shows a drill-down of the Incident Open/Close Times report generated in the previous section:

Incident Open\Close Times

Number	Severity	Open Time	Close Time	Update Time	Elapsed Time (Days)
IM10001	4	7/7/03 1:32 PM		7/21/03 2:53 PM	28.14
IM10002	3	7/7/03 1:56 PM	7/7/03 5:40 PM	7/7/03 5:40 PM	0.16
IM10003	2	7/7/03 2:02 PM	7/7/03 3:24 PM	7/7/03 3:24 PM	0.06
IM10004	1	7/7/03 4:24 PM		7/7/03 5:01 PM	28.02
IM10005	3	7/7/03 5:46 PM	7/8/03 9:28 AM	7/8/03 9:28 AM	0.65
IM10006	4	7/7/03 6:22 PM	7/8/03 9:29 AM	7/8/03 9:29 AM	0.63
IM10007	2	7/8/03 9:15 AM	7/8/03 9:17 AM	7/8/03 9:17 AM	0
IM10008	1	7/8/03 9:19 AM	7/8/03 9:26 AM	7/8/03 9:26 AM	0
IM10009	3	7/8/03 9:34 AM	7/8/03 11:50 PM	7/8/03 11:50 PM	0.59
IM10010	2	7/8/03 9:37 AM	7/8/03 11:48 PM	7/8/03 11:48 PM	0.59
IM10011	3	7/8/03 12:43 PM	7/8/03 11:46 PM	7/8/03 11:46 PM	0.46
IM10012	3	7/9/03 10:07 PM		7/21/03 12:49 PM	25.79
IM10013	4	7/9/03 10:10 AM	7/10/03 10:09 AM	7/10/03 10:09 AM	1

3 Either choose a parameter from the drop-down list **Add to filter :** Nothing at the top of the report; the parameters are appropriate for the report. Or click an underlined, hyperlink field within the report to examine information specific to that field.

To drill down to Severity 1 incidents in the Incident Open/Close Times report, either click an underlined **1** in the Severity column; or choose Severity from the Add to Filter drop-down list, and then choose **1** in the Severity list that appears. The resulting drill-down report shows only incidents with Severity 1:

Incident Open\Close Times

Number	Update Action	Open Time	Close Time	Update Time	Elapsed Time (Days)
IM10004	07/07/03	7/7/03 4:24 PM		7/7/03 5:01 PM	45.02
IM10008	07/08/200	7/8/03 9:19 AM	7/8/03 9:26 AM	7/8/03 9:26 AM	0
IM10020		7/10/03 9:58 AM	7/11/03 9:28 AM	7/11/03 9:28 AM	0.98
IM10023	10/07/200	7/10/03 2:22 PM	7/10/03 2:24 PM	7/10/03 2:24 PM	0
IM10029		7/14/03 9:22 AM	7/14/03 3:29 PM	7/14/03 3:29 PM	0.26
IM10034	07/16/03	7/15/03 12:59 PM	7/16/03 10:56 AM	7/16/03 10:56 AM	0.91
IM10046		7/21/03 3:03 PM	7/21/03 3:05 PM	7/21/03 3:05 PM	0
IM10055		7/23/03 1:34 PM		7/23/03 1:34 PM	29.14
				Average:	**9.54**

4 To end the drill and return to the original report, click **End Drill** at the top of the form. The complete report is displayed once again.

Reformatting reports

After you create a custom report or generate a standard report, you can change the report's appearance.

You can perform simple reformatting tasks on standard reports in the BI Portal Reporting form. See the section *Editing a report in the BI Portal Reporting form* on page 31

To perform more advanced reformatting tasks, or to change the query on which any report is based, use the WebIntelligence Reporting module.

To edit a report in the WebIntelligence Reporting module:

1 Run a standard or custom report.

2 Click **Edit** to open the WebIntelligence Reporting module.

Scheduling reports to run automatically

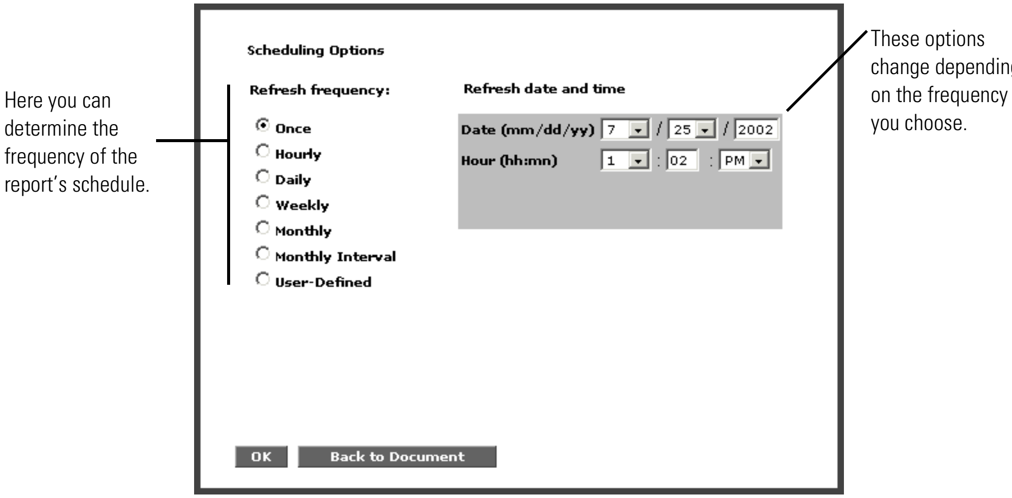
The information stored in databases is constantly changing, and you may find it useful to run queries and reports frequently to keep them up-to-date. You can schedule automatic generation of any standard or custom reports to which you have access, whether they have been saved, sent, or published, and whether they are stored in your Inbox Documents or Personal Documents folders.

To schedule a report:

1 Open any generated report.

2 Click **Schedule** at the top of the form.

The BI Portal Reporting form displays the Scheduling Options form, where you can choose how frequently the report is generated:



3 Choose a refresh frequency from the options on the left.

4 Choose additional details on the right. For example, if you choose **Monthly** as the Refresh frequency, choose the day of the month, the time of day, and the start and end dates for the generation cycle. For example:

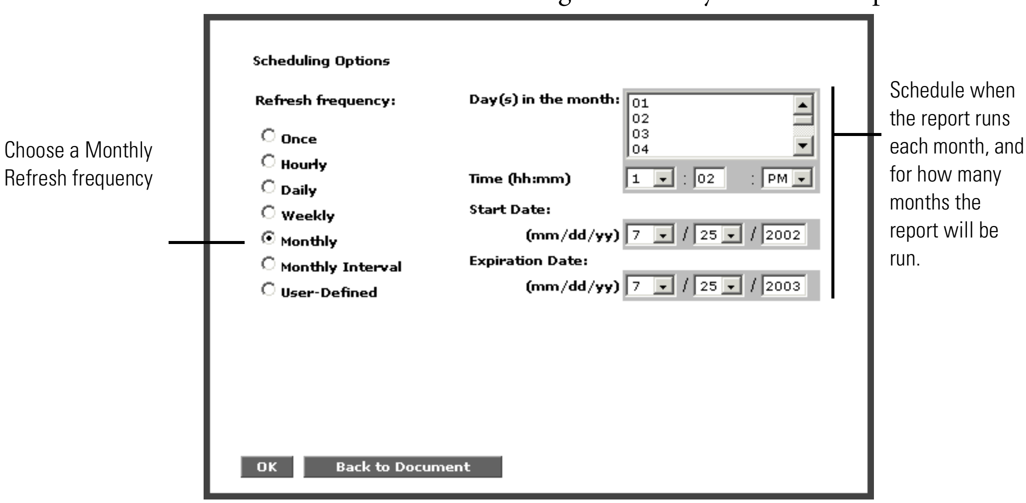


Figure 3-1: Scheduling a report to run monthly

5 Click **OK**.

A confirmation message appears at the bottom of the form, and the regenerated report appears in its current folder according to the schedule you have set. For example, if you schedule a report that was in your Inbox Documents folder, you can find the regenerated report in your Inbox Documents folder that is run according to that schedule.

Saving, sending, publishing, and exporting reports

You can save reports to your Personal Documents folder; send them to other users; publish them for other users to see and run; and export them in Excel and PDF formats.

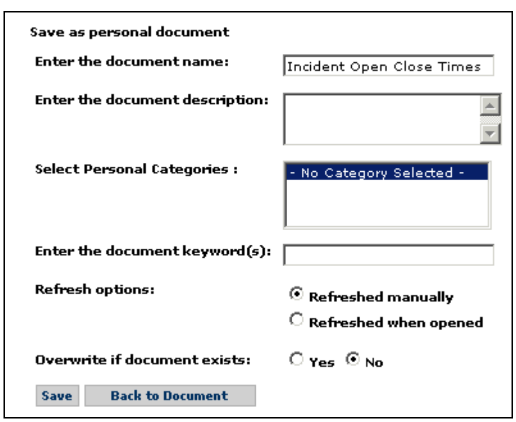
Saving reports

When you generate a standard or custom report, you can save it to your Personal Documents folder. Later you can run the same report to update its data.

To save a report:

1. After you generate a report, click the **Save** button.

   The BI Portal Reporting form opens a form where you specify how you want the report saved:



2. Specify the name you want assigned to the document.
3. Enter a description of the document.
4. Choose a personal category, if applicable.
5. Enter document keywords to help you find the document later.

6 Select whether the document is refreshed only when you run it; or refreshed automatically whenever you open it.

7 Finally, choose whether an existing version of the document is overwritten whenever a new version is created automatically.

8 Click **Save** and BI Portal saves the report to your Personal Documents folder.

Note: Standard reports that you modify cannot be saved using their original names. You specify a different name for each standard report that you want to publish.

To access a saved report:

▶ Click the **Personal Documents** link to see a list of your saved reports, and then select your report from the list to open and edit it as needed.

Sending reports

When you send a report, it is forwarded to another user's Inbox Documents folder.

To send a report:

1 With the report open, click the **Send** button.

2 Enter the following information in the form that opens:

- document name
- document description
- key words for the document

The information you enter here is what users who receive your report see.

3 In the Select the destination users list, click the names of the users you want to receive this report. To select more than one person, press and hold the **Ctrl** key as you click multiple names.

4 Click **Send**.

The report is sent to the Inbox Documents folders of the users you selected. The message "Document successfully sent" confirms that the report has been sent.

5 Click **Back to Document** to return to the report.

Publishing reports

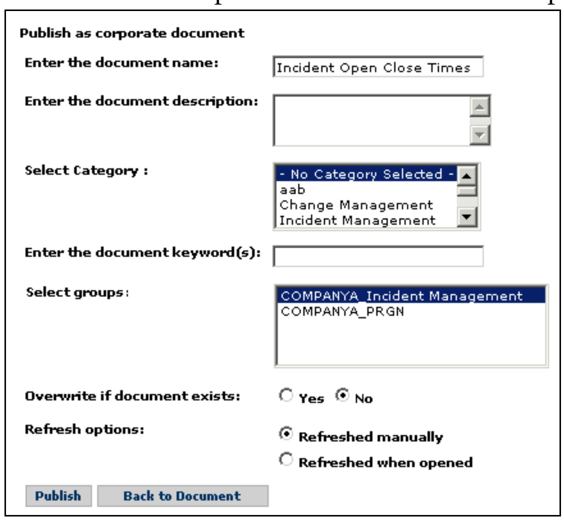
When you publish a report, you assign it to a document group, and it becomes part of the list of reports in the Corporate Documents folder. All users assigned to a user group that grants access to the report's assigned document group can then use the report.

To publish a report:

1 Run the report you want to publish.

2 Click **Publish**.

3 The Publish as corporate document form is displayed:


Publish as corporate document

Enter the document name: Incident Open Close Times

Enter the document description:

Select Category : - No Category Selected - / aab / Change Management / Incident Management

Enter the document keyword(s):

Select groups: COMPANYA_Incident Management / COMPANYA_PRGN

Overwrite if document exists: Yes No

Refresh options: Refreshed manually / Refreshed when opened

Publish | Back to Document

4 Enter the following information:

- The name of the document
- A description of the document to help others identify it
- Document keywords to help other users search for the report. Only individual keywords are allowed; no phrases. Multiple keywords must be separated by spaces. (For more information about searching see the section *Searching for reports* on page 13.)
- The document group
- Whether an existing version of the report should be overwritten if a new version is created and published
- Whether the report, and the query on which it is based, should be refreshed manually, or refreshed automatically when opened.

5 Click **Publish**.

The message "Document successfully published" is displayed at the bottom of the form, and the report is published to the Corporate Documents folder in the document group you chose.

Note: Standard reports cannot be published using their original names. You specify a different name for each standard report that you want to publish.

6 Click **Back to Document** to return to the report.

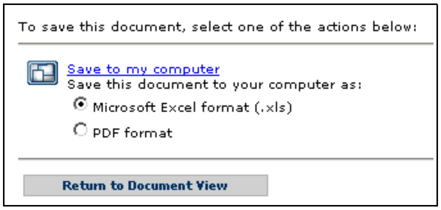
Note: If you later want to edit a document's name, description, category, keywords, and groups, or reset its overwrite and refresh options, run the report and re-publish it following the steps above.

Exporting reports

You can take the information from a report and export it to an Excel spreadsheet or to a PDF document.

To export a report:

1 Open the report you want to export and click **Download**. The form prompts you to select either Excel or PDF format:



2 Choose either **Microsoft Excel format** (.xls) or **PDF format**.

3 Click **Save to my computer**.

4 In the File Download dialog box, select **Save this file to disk**.

5 Click **OK**.

6 In the **Save As** dialog box navigate to the location where you want to save the file. Enter a new name if you want.

7 Click **Save**.

The file is saved as an Excel or PDF file in the location you specified.

8 In the Download Complete dialog box click **Close**.

9 In the Download form click **Close**.

10 To close the Export form, click **Return to Document View**.

4 CHAPTER Advanced reporting functions

This chaper addresses the following advanced reporting functions:

Who can use advanced reporting functions?

To use the WebIntelligence Reporting module your system administrator assigns you user *capabilities*, which grant you access to the module's various functions. The administrator can assign new capabilities if you need them.

About ad hoc queries and custom reports

To create a custom report you build and run an ad hoc query in the WebIntelligence Reporting module.

After you have created a custom report, you can save it for personal use or publish it for others to see. (The section *Saving, sending, publishing, and exporting reports* on page 38 covers saving and publishing reports.)

Using the WebIntelligence Reporting module

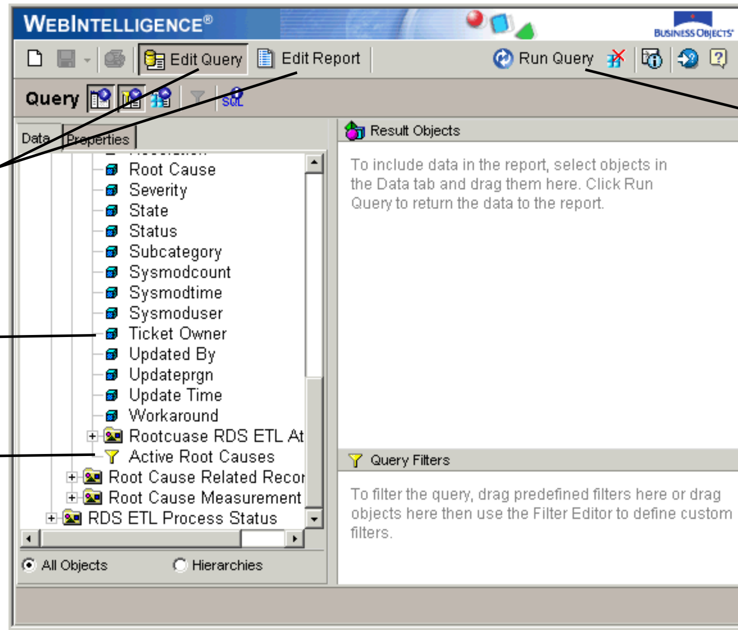
You can use the WebIntelligence Reporting module to build and run a query, and to view and format the report that shows the information returned by the query.

To view the WebIntelligence Reporting module:

1 Open the BI Portal Reporting form and click **Create**.

The BI Portal Reporting form lists the universes that are available for queries and reporting. In BI Portal, there is only one universe available by default: `rds`.

2 Click **rds** to select the **rds** universe link. The WebIntelligence Reporting module opens in Edit Query mode (the Edit Query button Edit Query is highlighted):



The WebIntelligence Query Manager, which appears on the left, includes all the objects that you can include in your query. Objects are grouped in classes, which are similar to folders. If you do not see an object you want to use, open the folders that contain the object. There are three types of objects in the WebIntelligence Reporting module:

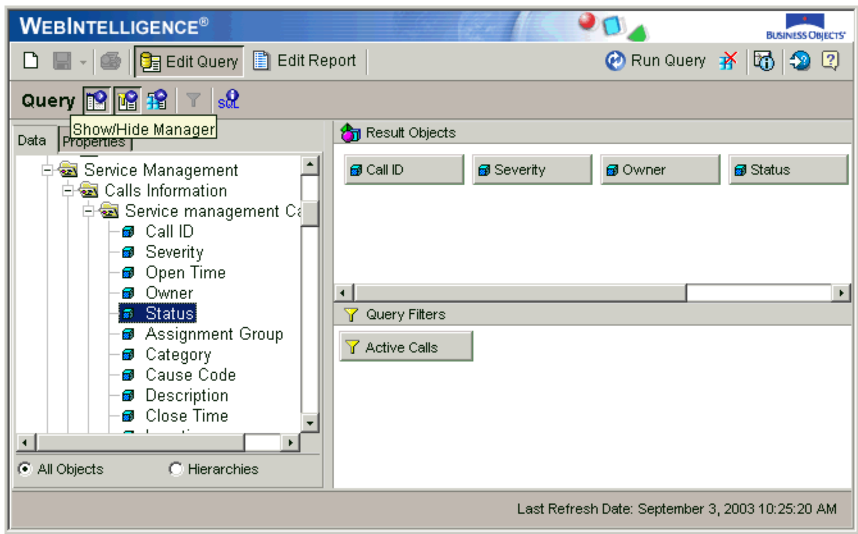
Object type	Description	Icon
Dimension object	Non-quantifiable attributes such as Name, Company, and Location	
Measurement object	Quantifiable attributes, which can be included in totals, averages, and other metrics.	
Condition object	Objects used to create filters, which limit the values selected when the query is executed.	

You can divide the report into subsections according to object categories, or you can simply include objects and display their values in the report.

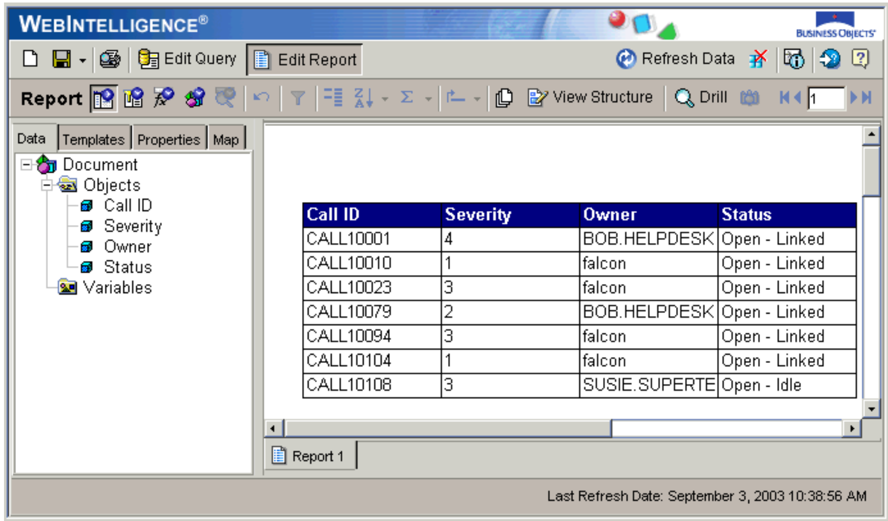
Note: When you are editing an *existing* report, only those objects that were used in the query on which the report is based are available in Edit Query mode. When you are creating a *new* query, all the objects and filters in the `rds` universe are available in Edit Query mode.

3 In the Query Manager you drag and drop the objects you want to include in your query onto the Result Objects panel; and drag and drop filters onto the Query Filters panel.

For example, the following graphic shows a query that includes information about Service Management calls: the Call ID, Severity, Owner, and Status. Further, the Active Calls filters includes only calls whose status is Active:



4 Click the **Run Query** button Run Query to execute the query. The report that is based on the query you just built is displayed on the right side of the form.



Notice that the WebIntelligence Reporting module is now in Edit Report mode (the Edit Report button Edit Report is highlighted); and that only those objects and filters included in the query are available in the Report Manager, which is now displayed in the left-hand panel.

After the user drags and drops attributes to the Result Objects pane and runs the Query once, to make modify the report and run it again, either

- Click the **New Document** icon to initiate a new query, or
- Click the **Edit Report** tab, and drag and drop objects from the list of available objects into the Report Result pane to see the data.

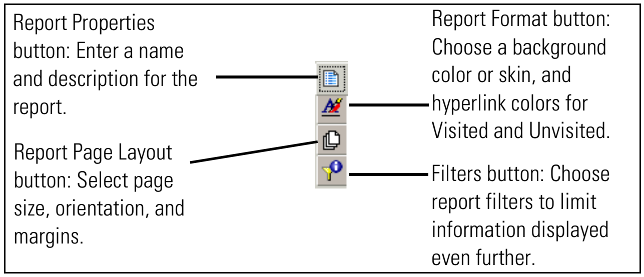
5 To change the information you see in the report, click **Edit Query**, and either:.

a Click the New Document icon ; build an entirely new query; and click **Run Query**; or

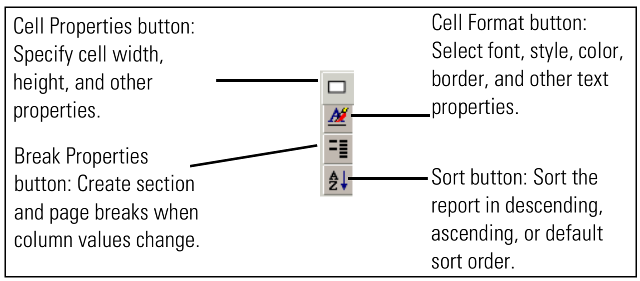
b Drag and drop objects you want to add from the Query Manager onto the Result Objects panel; click **Run Query**; and drag and drop the new objects from the Report Manager to the report, to the location where you want them to appear; or

c Drag and drop objects you want to remove from the Result Objects panel onto the Query Manager and click **Run Query**.

6 In Edit Report mode you can perform a large number of report formatting tasks. For example, click the **Properties** tab to display the Report Properties panel. The following Report Properties buttons offer report formatting functionality:



You can click inside the report and display the Cell Properties panel. The following Cell Properties buttons offer report formatting functionality:



Or, right-click a column to display a cell formatting menu.

Finding additional information about WebIntelligence

The WebIntelligence Reporting module is a very complex and powerful query and report generation tool. The steps shown in the following sections demonstrate only a small subset of the functions that are available when building and running queries, and formatting reports. For complete information about the WebIntelligence Reporting module, click Help, and read the *InfoView User's Guide* that opens. Or refer to the *WebIntelligence User's Guide*.

APPENDIX A User Exercises

Introduction

This appendix includes exercises that demonstrate how you perform certain tasks in BI Portal. They are intended to show you features and functionality of BI Portal.

- *Accessing Data* on page 49
- *Reporting* on page 50
- *Analyzing Data* on page 57

Accessing Data

This section presents a set of tasks that illustrate how you access data.

1. Log in to BI Portal.
2. Select a document group from the **Document Groups** drop-down list.
3. Click any column heading to sort the document list in *ascending* order. Click again to re-sort the document list in *descending* order.
4. Click the Document Properties icon in any row to display that document's properties. Click **Back to Document List** to re-display the document list.
5. Choose **All categories** from the **Document Groups** drop-down list.
6. Click **Down Assets** report to run the Down Assets report.

7 Click **Refresh** to get the latest data.

When you publish a report, you can specify **Refresh options** for the report: either **Refreshed when opened** or **Refreshed manually**. See the section *Publishing reports* on page 40 for complete information about publishing reports.

8 Click **View in PDF**. to display the report in PDF format. Then click **View in HTML** to re-display the report in HTML format.

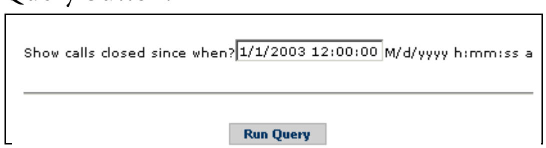
The HTML format of the report that is displayed in your browser is dynamic and its data can be refreshed. The PDF format is static. If you click **Refresh** while viewing the report in PDF format, the report is re-displayed in HTML format with the data refreshed. The PDF format is used for printing.

9 Click **Maximize** to open a new instance of the browser with the report displayed in full-screen mode. Because a new instance of the browser is opened, you can leave the report open in Maximize mode and view multiple reports at one time.

10 Click Corporate Documents to display the entire document list.

11 Click **Incidents Closed By Operator Since X** to run the Incidents Closed By Operator Since X report. No incidents are displayed.

12 Click **Refresh**. BI Portal displays the following date input field and **Run Query** button:



13 Change the **Show calls closed since when?** parameter to **1/1/2002 12:00:00 AM**; this corresponds with the required date format: (**M/d/yyyy h:mm:ss a**).

14 Click **Run Query** to execute a new query based on the date you specify and refresh the report.

Reporting

This section describes the steps you follow to create and format reports and charts.

Creating a report and chart

Follow these steps to create a Closed Tickets by Severity query; generate a report based on the query; add a chart; and format the report and chart:

1. In the BI Portal Reporting form click **Create**. (If you have not used the WebIntelligence Reporting module on your computer, it may take a few minutes for all its components to load.)
2. The BI Portal Reporting form displays a list of all available universes. Universes are discussed in the section *Universes, classes, and objects* on page 14, and in the *WebIntelligence User's Guide*.
3. Click **rds** to select the rds universe.
4. The Edit Query screen is displayed by default when you click **Create** to open the WebIntelligence Reporting module. Notice the following elements in the WebIntelligence Query Manager:
   - The ServiceCenter Common Objects class contains supporting classes and objects that are referenced by every ServiceCenter module. The ServiceCenter Common Objects class also contains the Common Hierarchy and the Timedimension class.
   - The Common Hierarchy contains Asset, Location, Department, and Contact hierarchies. These hierarchies follow parent-child relationships that are used for drilling into reports to examine detailed data and for OLAP reporting.
   - The Timedimension class contains date and time subdivisions that are used for drilling into reports to examine detailed data and for OLAP reporting.
   - ServiceCenter Modules. These are five tables that represent the five primary ServiceCenter Modules: Service Management, Incident Management, Inventory Management, Change Management, and Root Cause Analysis.
   - Dimension objects, Measurement objects, and Filter objects. Dimension objects are categorical information, used for grouping and showing detail. Measurement objects are numerical fields used for aggregations. Filter objects are pre-defined query filters that limit the data returned by a query. can be used as a shortcut to manually building a WHERE clause.
   - Aggregations — Pre-defined summaries that are grouped on commonly indexed fields. Used for drilling into reports to examine detailed data and for OLAP reporting.

5 Create a new query called Closed Tickets by Severity:

a Drag and drop the following objects from the WebIntelligence Query Manager to the Result Objects panel. All are found in the rds hierarchy under Incident Management/Incidents Information/Incidents Summary.

- Number
- Severity
- Company
- Owner Name
- Close Time

b Drag and drop the following measurement object from the WebIntelligence Query Manager to the Result Objects panel. It is found in the rds hierarchy under Incident Management/Incidents Measurements.

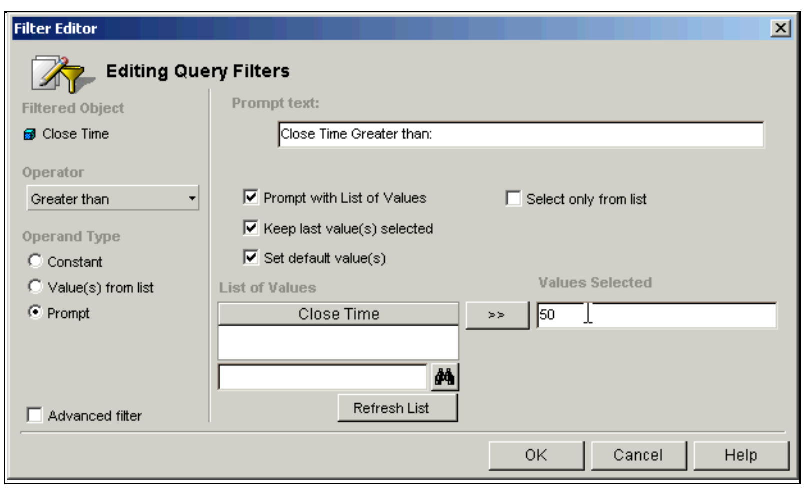
- Number of incidents

c Drag and drop the following filter from the WebIntelligence Query Manager to the Query Filters pane. It is found in the rds hierarchy under Incident Management/Incidents Information/Incidents Related Records.

- Closed problem incidents

6 Create a filter that prompts the user to specify a minimum Close Time.

a Drag and drop the Close Time object onto the Query Filters pane. The WebIntelligence Reporting module displays a Filter Editor:



b In the Filter Editor choose the **Greater Than** operator

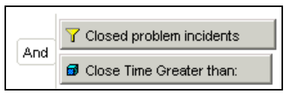
c Choose the **Prompt** operand type

d Make sure **Prompt with List of Values**, **Keep last value**(s) **selected**, and **Set default value**(s) are checked.

e In the **Values Selected** field enter a default value for Close Time that the filter will use in case the user does not enter a value when prompted. This example shows a default Close Time of **7/15/2003 7:54:37 AM**; so if the user does not enter a Close Time when prompted, the query will return information about only those Incidents whose Close Time is later than 7/15/2003 7:54:37 AM.

f Click **OK**.

g The Query Filters pane in the WebIntelligence Reporting module now displays the following:



7 Click the **View SQL** button  to open the SQL Viewer, where you can examine the SQL that will be executed when you run the query. Click **Close** in the SQL Viewer when you are satisfied with the SQL code.

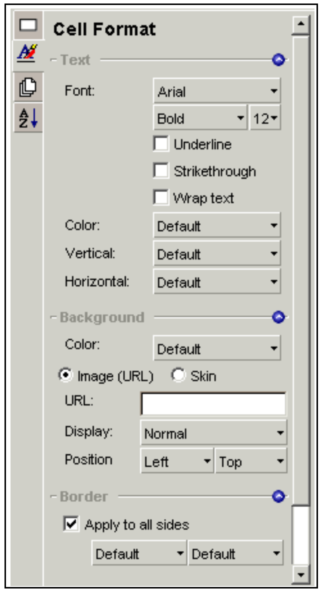
8 Click **Edit Report** to open the Edit Report screen. Drag and drop Owner Name above the table to create a section.

Report sections repeat once for each unique value. Whenever you drag a field over to the left top side, you will automatically create a section. If you don't want an object in the section, drag and drop it in the Report Manager on the left to remove it; and then delete the section.

9 Make the **Owner Name** section delineator into a section header.

a Click the Owner Name box that appears above the table to highlight it

b Click the **Properties** tab in the Report Manager to display the **Cell Format** panel in the Report Manager:



c Use the **Cell Format** panel to specify the font, style, color, and other properties, of the section header.

10 Sort the report on the Severity column:

a With the **Properties** tab in the Report Manager selected, click the Severity column to highlight it.

b Click the Sort button .

c In the Sort options choose Ascending.

11 Create a break on the Severity column. Whenever the value of a column with a break changes, a blank row and a new title bar are inserted to highlight the changed value. Breaks are used only on sorted columns. To create a break on the Severity column:

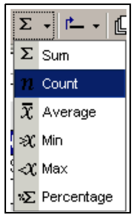
a With the **Properties** tab in the Report Manager selected, click the Severity column to highlight it.

b Click the Break button .

12 Create a count on the Number column:

a With the **Properties** tab in the Report Manager selected, click the Number column to highlight it.

b Click the Insert Sum button and choose Count from the list:



.

13 Move the cursor into the table area to highlight the table. Notice that there is a "dead" row that has =[**Summary**] on the left-hand side. Now that you have chosen the summary option (on the Number column, in the previous step), it is safe to delete this row. To delete the "dead" row:

a Click =[**Summary**] in the "dead" row to highlight it.

b Right-click to display the menu.

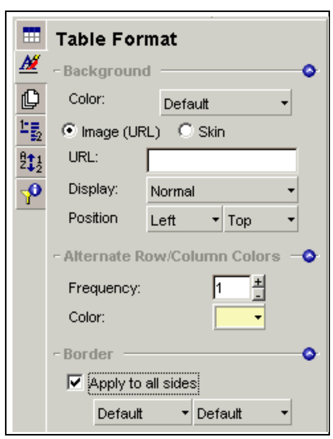
c Click **Delete Row** to remove the "dead" row.

14 Format the table with alternate row coloring:

a With the **Properties** tab in the Report Manager selected, move the cursor near the table, but not within it, so that a gray border is shown around the entire table.

b Click to highlight the entire table. (If you click *within* the table, you select a single field.)

c The Table Format panel is displayed in the WebIntelligence Report Manager:



d Choose a **Frequency** of **1** to alternate on every (1) row.

e Choose a color that will be used in alternate rows.

15 Click **Edit Query**.

16 Click **Run Query** to run the query and generate a report.

17 Switch to View Structure mode. You toggle between View Results mode and View Structure mode as follows:

a In View Results mode, click **View Structure** to switch to View Structure mode.

b In View Structure mode, click **View Results** to switch to View Results mode.

18 In View Structure mode create a bar chart:

a Click near (but not inside) the table structure to highlight it.

b Drag the table structure lower to make room for a chart.

c Click the **Templates** tab in the Report Manager.

d Expand the Charts folder.

e Expand the Bar folder.

f Click the 3D Bar object to highlight it.

g Drag and drop the 3D Bar object onto the space above the table structure.

h Click the Data tab in the Report Manager.

i Drag and drop the Severity object from the Report Manager onto that portion of the bar chart labeled **Place dimension objects here**.

j Drag and drop the Number of Incidents object from the Report Manager onto that portion of the bar chart labeled **Place measure objects here**.

k Click **View Results**. The bar chart and reports are displayed.

19 Change the chart from a bar chart to a pie chart:

a Click the **Templates** tab in the Report Manager.

b Expand the Pie folder.

c Drag and drop the Pie object onto the chart. The chart is transformed into a pie chart.

20 Add a blank cell that contains a title for the report:

a Expand the Free-Standing Cells folder.

b Expand the Formula and Text Cells folder.

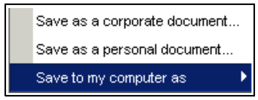
c Drag and drop the Blank Cell object onto the report, above the pie chart.

d Re-size the blank cell and center it on the report. When the blank cell is highlighted, the Formula Editor is available.

e Here you enter a title for the report.

f Click the Validate button . The title is inserted into the blank cell.

21 Click the down-arrow to the right of the Save button to display the Save menu:



22 Choose **Save as a personal document** and click **Save**.

Analyzing Data

Creating an OLAP report

Follow these steps to create an OLAP report:

1 In the BI Portal Reporting form click **Create**.

2 In the WebIntelligence Reporting module create a new query that contains the following objects:

a Drag and drop the following object from the WebIntelligence Query Manager to the Result Objects panel. It is found in the rds hierarchy under ServiceCenter Common Objects/Location Hierarchy:

- Level 0 Name.

b Drag and drop the following object from the WebIntelligence Query Manager to the Result Objects panel. It is found in the rds hierarchy under Service Management/Calls Measurements:

- Number of Calls

c Drag and drop the following object from the WebIntelligence Query Manager to the Result Objects panel. It is found in the rds hierarchy under Incident Management/Incident Measurements:

- Number of Incidents

d Drag and drop the following object from the WebIntelligence Query Manager to the Result Objects panel. It is found in the rds hierarchy under Inventory Management/Inventory Measurements:

- Number of Asset

3 Create a new table block by copying the existing one:

   a Click Edit Report.

   b Drag and drop the Objects folder in the Report Manager onto the report, below the existing table block. This action creates a new table block.

4 Drag and drop one or both table blocks to align them and to make sufficient space for a bar chart.

5 Click the **Templates** tab in the Report Manager.

6 Expand the Charts folder.

7 Expand the Bar folder.

8 Drag and drop the Vertical Grouped object onto the table block that you want to change into a bar chart.

9 Click the bar chart to select it.

10 Click the **Properties** tab.

11 Check **Axis legend** and **3D look.**

12 Click **Edit Query**.

13 Click Run Query to execute the query and generate the report and bar chart.

14 Hide X-axis and Y-axis labels:

   a In Edit Report mode right-click the chart and choose **Edit Format** from the menu.

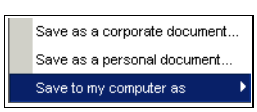
   b In the Chart Format panel choose **X Axis Label** from the **Apply To** drop-down list.

   c Un-click **Show Object Name.**

   d In the Chart Format panel choose **Y Axis Label** from the **Apply To** drop-down list.

   e Un-click **Show Object Name.**

15 Click the down-arrow to the right of the Save button to display the Save menu:



16 Choose **Save as a personal document**; enter **OLAP report** in the Name field; and click **Save.**

Viewing your OLAP Reports

1. In the report list displayed in the BI Portal Reporting form double-click **OLAP report** to open the report that you just created.
2. Click **Drill.**
3. The values in the report are now underlined hyperlinks.
4. To drill down either:
   - Hold the cursor over a hyperlink field and choose **Drill Down to Level *Down* Name** from the menu. (where ***Down*** is the next lower level)
   - Click a value to drill down to the next lower level.
5. To drill up either:
   - Hold the cursor over a hyperlink field and choose **Drill Down to Level *Up* Name** from the menu. (where ***Up*** is the next higher level).
   - Click the up-arrow in the column title.
6. To sort the report by a column, hold the cursor over the column or title; choose Sort from the menu; and choose **Default**, **Ascending**, or **Descending** from the sub-menu.

7. To filter the report and display only specified values:
   a. In the **Add to filter** drop-down list choose a level at which values will be selected.
   b. In the Level 0 name drop-down list either:
      - Choose **Level 0 Name** * to view all records at that level
      - Choose a value
      - Choose a value; click **Remove** to delete the value from the list; and then choose **Level 0 Name** * to view all records *except* those that have the value you deleted.
   c. In the Level 1 name drop-down list either:
      - Choose **Level 1 Name** * to view all records at that level
      - Choose a value
      - Choose a value; click **Remove** to delete the value from the list; and then choose **Level 1 Name** * to view all records *except* those that have the value you deleted.

Index

Peregrine Systems

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