



PUBLIC

SAP BusinessObjects Business Intelligence Suite

Document Version: 4.2 Support Package 9 – 2021-04-29

SAP BusinessObjects Web Intelligence Interactive Viewer User Guide

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1 Document history

The following table provides an overview of the most important document changes.

Version	Date	What's New
SAP BusinessObjects Web Intelligence Interactive Viewer 4.2 Support Package 4	May 2017	Initial release of this document.
SAP BusinessObjects Web Intelligence Interactive Viewer 4.2 Support Package 5	December 2017	What's New in Web Intelligence Interactive Viewer 4.2 SP5
SAP BusinessObjects Web Intelligence Interactive Viewer 4.2 Support Package 6	July 2018	What's New in Web Intelligence Interactive Viewer 4.2 SP6
SAP BusinessObjects Web Intelligence Interactive Viewer 4.2 Support Package 7	February 2019	The 4.2 SP7 release focused on feature stabilization, and no changes were made to the document.
SAP BusinessObjects Web Intelligence Interactive Viewer 4.2 Support Package 8	February 2020	The 4.2 SP8 release focused on feature stabilization, and no changes were made to the document.

2 What Is Web Intelligence Interactive Viewer?


Web Intelligence Interactive Viewer is a modern version of Web Intelligence and allows you to consult documents and reports in a new way.

The features are laid-out differently to favor a seamless user experience and minimize the user learning curve. You can either consult the data in a document or perform simple tasks to organize the data using advanced

options in the  menu.

The advanced options offer more possibilities for organizing the information thanks to its ranking, sorting, folding and drilling features.

If you want to perform tasks that are only available via the Web Intelligence's *Design* mode, you can switch to

Web Intelligence classic clients at any time by clicking the *Open in Designer* option in the *More...*  menu.

How is it different?

It offers a redesigned user experience and comes with the same features as Web Intelligence *Reading* mode, plus some extra functionalities that help you interact more with the data in your documents and reports.

Who is it for?

If you analyze data using reports and make business decisions based on them, or if you don't design reports, but simply need to consult and make a few tweaks to them, then Web Intelligence Interactive Viewer is for you. Its responsive nature makes it easy to use if you work on the go.

What about the BI Launch Pad?

Web Intelligence Interactive Viewer is smoothly integrated to the BI launch pad whose interface has also been redesigned. You can now browse your assets using the new BI launch pad interface and consume them in the new viewer.

3 Overview of Web Intelligence Interactive Viewer

With Web Intelligence Interactive Viewer, you can consult and analyze Web Intelligence documents and reports easily on the device of your choice, including desktop computers or tablets.

Consult your data by navigating your reports, focusing on the data that interests you, and commenting on the data.

Use the filtering abilities to get the answers to your business questions and tailor your documents and reports to your business needs.

With Web Intelligence Interactive Viewer, you can:

- Navigate your data
- Show or hide the data with folding actions
- Focus on different levels of hierarchical data
- Filter using drill filters, input controls, and element links
- Organize the data with ranking and sorting

If you are a report designer working in Web Intelligence Interactive Viewer, any time you want to make any change – from editing a table to overhauling the report design entirely – you can shift to the Web Intelligence [Design](#) in a few clicks or taps.

4 Getting Started with Web Intelligence Interactive Viewer

Before you can view documents and reports in Web Intelligence Interactive Viewer, you need to browse for the documents in the BI launch pad. After you log onto the BI launch pad, you land on the [My Home](#) page. This page contains all your most recent and most used documents.

All your Web Intelligence documents are listed under the [Folders](#) tab, where you can browse and manage them.

Note

The URL for the BI launch pad should be `http://<WebServer>:<PortNumber>/BOE/BILaunchpad/`, where `<WebServer>` is the name of the web server for BI platform and `<PortNumber>` is the port number for the web server.

For more information on the BI launch pad, see the *Business Intelligence Launch Pad User Guide*.

4.1 Managing documents and reports in Web Intelligence Interactive Viewer

The following sections provide details on how to manage documents and reports.

4.1.1 Opening documents

Generally, you manage and open your documents centrally from the Fiorified BI launch pad. Your documents open in Web Intelligence Interactive Viewer.

Web Intelligence Interactive Viewer is backed up by the Fiorified BI launch pad, in the same way that Web Intelligence is aligned with the BI launch pad.

On occasion, you may receive a direct link to a document from a coworker that uses the OpenDocument feature. Depending on how the link is set, it opens either in the Web Intelligence Interactive Viewer, or in the HTML client.

Note

You can't open the Java client directly from an OpenDocument link in the Web Intelligence Interactive Viewer.

Related Information

[To open a document \[page 8\]](#)

4.1.1.1 To open a document

You can open one or more documents in the Web Intelligence Interactive Viewer from the new BI launch pad.

1. Log onto the BI launch pad using your credentials.
2. Click or tap [Folders](#) to browse documents.
3. Click or tap a document to open it. You can also click or tap the ellipsis and then select [View](#).

→ Tip

If you use a document regularly, it most likely appears in the [My Home](#) tab.

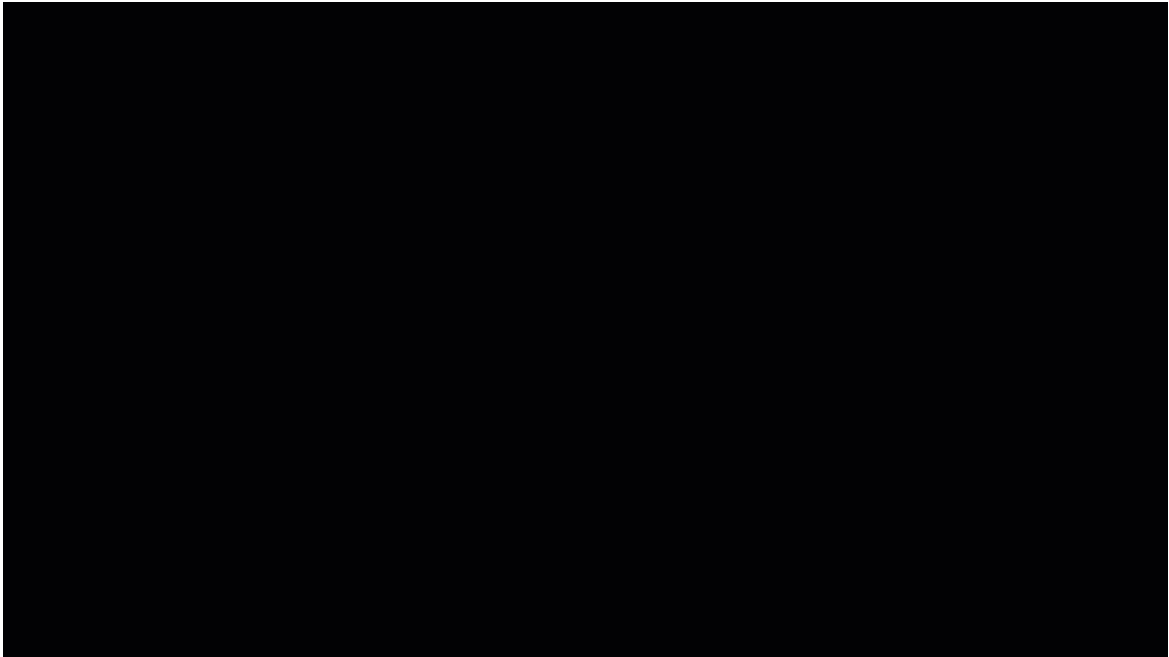
If you want to open another document, click or tap the [Home](#) icon to go back to the BI launch pad home screen and repeat the steps above.

4.1.2 To switch between open documents

1. Click or tap [BI Launch Pad](#) on top of the report page.
2. Click or tap the document you want to open.


4.1.3 To switch between reports

1. Click or tap the dropdown menu next to the name of the report.
2. Click or tap the name of the report you want to open.



4.1.4 To refresh a document

Refresh your document so it shows the most up-to-date data available from the data source.

1. Click or tap the [Refresh](#)  icon in the toolbar to refresh all data providers.
2. Answer the prompts or define any variables, as necessary, and click or tap [Run](#).

Your document now contains the most up-to-date data available.


Note

As of the 4.2 SP6 release, you can select the queries you want to refresh in Web Intelligence classic clients. This feature has a direct impact on Web Intelligence Interactive Viewer, as predefined preferences defined in classic clients carry over to the Interactive Viewer. The [Refresh](#) icon is disabled if no queries were defined as refreshable. If you want to edit the list of queries to be refreshed but do not have the necessary rights, ask your report designer to do so. If you have editing rights in Web Intelligence classic clients, use the [Open in Designer](#) option to open the document in a classic client and edit the list.

4.1.5 Auto-Refresh mode

The Auto-Refresh mode allows the application to automatically update your document regularly, depending on an interval you define.

The interval corresponds to the time between the start of a refresh and the start of the next one. You set the

frequency of refreshes when turning on the Auto-Refresh mode in the  menu of the toolbar. If a refresh takes longer than the defined interval, the next planned refresh(es) are skipped until the current refresh is complete.

If your document has prompts, you only provide answers once and they are then saved for the next planned refreshes.


This mode is intended specifically for a viewing experience. When enabled, you can navigate the document but cannot edit, comment, rank or sort its values. Also, the toolbar displays the date of the last refresh.

During a refresh, the [Refresh](#) dialog box doesn't display. Instead, the last refresh time is displayed in the toolbar.

Note

The auto-refresh functionality partly relies on the data providers defined as refreshable in Web Intelligence classic clients. The Auto-Refresh mode is disabled if no queries were defined as refreshable by the report designer in one of the classic clients. For more information on the queries you can set as refreshable, refer to the [Defining queries as refreshable](#) section of the *SAP BusinessObjects Web Intelligence User's Guide*.


4.1.5.1 To automatically refresh a document

1. Click the  icon in the toolbar.
2. Click [Auto-Refresh Mode...](#)
3. Set the interval between refreshes (in minutes).
The value has to be between 1 and 1440.
4. **Optional:** Answer prompts if there are any.
The answers you provide are saved for the next refreshes in Auto-Refresh mode.
5. **Optional:** To turn off Auto-Refresh mode, click [Turn Off Auto-Refresh](#).

4.1.6 To toggle chart animations in a document

Chart animations apply to the document you are working on. If you want to have animations in several documents, make sure to follow this procedure for each document. This option is disabled by default.

1. Open the side panel.

2. Click  to open the [Document Summary](#).
3. Expand the [Options](#) section.
4. Click the [Chart animations](#) toggle to enable or disable chart animations.

4.1.7 To edit a report

You can switch to Web Intelligence [Design](#) mode to benefit from its full set of report design features.

Switch to Web Intelligence [Design](#) mode when you want to add a report element, new filters, or element links, and much more.


1. Click the [More...](#) menu.
2. Click [Open in Designer...](#)

4.1.8 To export a report

You can export all the reports in a document or only specific ones to a PDF file, an Excel spreadsheet, or an HTML archive. An HTML archive is a ZIP file that contains HTML files.

To identify the correct pages for export when you export the current page or specific pages to a PDF file format, display the document in Page mode. The way the PDF export displays the data on pages will match the display in Page mode, but can differ from the display in Quick Display mode.

Select [Page Mode](#) from the [More...](#)  menu.


1. Click or tap the [More...](#)  icon in the toolbar.
2. Click [Export](#).
3. Select the file format and the reports for the export.
4. Define the options available for the file format you selected, as necessary.

Note

When exporting to PDF, the [Display Bookmarks](#) option allows Adobe Acrobat Reader to display the bookmarks tab when opening the document to make the navigation easier. By default, the option is disabled.

5. Click or tap [Export](#).
6. Download and save the file, according to your browser type.

4.1.9 To send a document

1. Click or tap the [More...](#)  icon in the toolbar.
2. Click or tap [Send to...](#)

5 Consulting your data in Web Intelligence Interactive Viewer

In the Web Intelligence Interactive Viewer, you benefit from a variety of features for consulting your data.

5.1 Data exploration concepts

This section describes the key features available in the Web Intelligence Interactive Viewer for navigating and manipulating the data in your report.

They include:


- Lists of values to restrict the data stored or displayed in your report
- The [Navigation Map](#) to quickly access the data that interests you
- The [Filters](#) menu to check the restrictions on the data displayed
- Actions for manipulating your data
- Element links to filter your data in a single click or tap

5.1.1 Lists of values

Lists of values let you select data that will best inform your business decisions.

One of the first places you see a list of values may be in a prompt, but lists of values are also present in other parts of the interface, such as filters.

You can select one or more items in a list of values or you can search the list to find the values that relate to your analysis. Searching for values is particularly useful if your report contains a very large data set, because you can quickly see the data stored in the report.

Whenever you see a search icon  next to a search bar, you can search for values.

5.1.1.1 Viewing technical keys of values

You can search for and view the technical keys of data values, when your database supports this activity.

Reports can contain very large data sets. Because the technical key reflects the way data is stored in the database, using it to search for data values with the technical keys gives you quick and reliable.


Input control properties let you set the technical key for each value in a list of values to show.

Related Information

[To search for values using technical keys \[page 14\]](#)

5.1.1.1.1 To search for values using technical keys

For reliable results on your search, use the technical keys, when your database supports it.

1. Select an input control.
2. Click the cogwheel  icon.
The *Properties* dialog box opens.
3. Click the *Show keys* toggle button.
4. Click the back arrow to see the technical keys.

5.1.2 The Navigation Map



For an overview of the way your report organizes the data into sections and for quick access to the sections that interest you, use the *Navigation Map*.

Sections divide report data based on values in the report. A report can contain sections and sub-sections, depending on its design.

The *Navigation Map* shows links to all the sections in the report and lets you search for specific values among the sections. Searching for values saves you time in locating the information you want, particularly when the report contains a lot of data.

Click or tap a section to go to the section data in the report and see its sub-sections in the *Navigation Map*. The sections and sub-sections you selected appear as a path at the top of the *Navigation Map* to remind you of how you navigated to the data you are presently viewing.

You can display the *Navigation Map* in the left panel, according to your device type, as follows:

- With a mouse, show the vanishing toolbar by moving your mouse to the bottom center of the screen and click the  icon on the toolbar.
- On a tactile screen, show the vanishing toolbar by swiping the bottom of the screen and tap the  icon on the toolbar.

5.1.3 The Filters menu

To determine whether the data that interests you is in the report, check the [Filters](#) menu for all the information about the filter types that restrict the data and the values in the report.

Filter types include:

- Prompts
- Input controls and filter paths

To see the [Filters](#) menu, on the toolbar click or tap the  icon.

5.1.3.1 The Prompt Summary

The [Prompt Summary](#) shows the values selected for each question in the prompt. These values limited the data retrieved from the data source at the last refresh.

When your report has prompt questions, you can check the [Prompt Summary](#) by clicking or tapping [Prompts](#) in the [Filters](#) menu.

The [Prompt Summary](#) lists all the prompt questions and the values selected for each question at the last refresh. To check if the values that interest you are in your report, you can also search the values in the [Prompt Summary](#). Searching for values saves you time when the prompt includes many questions and values.

Keep in mind that if you search for a value in the [Prompt Summary](#) and cannot find it, that means the value is absent from the [Prompt Summary](#), not that it is absent from the data source.

You can also see all values selected for a specific prompt question by clicking or tapping the  icon next to it.

5.1.3.2 Input control and filter path values

Input controls restrict the data that displays in the report based on the values selected in the input control.



The input controls display next to the prompts in the [Filters](#) menu. The report designer creates them and, sometimes, groups them together. Each input control in a group further restricts the data that shows in your report.

If there are groups of input control in a report, they display as a filter path. The filter path is a visual representation of the values selected successively for the input controls in the group.

To view the details for an input control, click or tap it.

5.1.3.3 To view the values that filter your report

To understand the data that displays in your report, you can view the filter types and values selected for filtering that data.


1. Click or tap the  icon to see the Filters toolbar, when necessary.
2. Click or tap a prompt or a multi-selection input control on the toolbar.
3. Do one of the following:
 - To view the selected values for a prompt, click or tap the name of the prompt in the [Prompts Summary](#) dialog box.
 - To view selected values for an input control, click or tap the check mark icon .

5.1.4 Manipulating data

To take actions on the data in your report, you select the report element with the data for access to the icons or menu items for the possible actions.

The actions you can perform depend on the advanced options enabled in the report and on the way you select the data. Manipulating data has been made easy by implementing direct actions. They are called direct because you can perform them directly with a mouse click.

Note

Ranking, sorting, folding and drilling actions are only available if you enable them in the  menu.

Left-click actions

Visualization	Actions available
Chart	A tooltip displays more information about the datapoint you selected.
Table	<ul style="list-style-type: none">• Fold• Rank• Sort• Apply/remove element link <p>These actions are applied to the whole chart if you click once. If you click twice, they apply to the feed you selected.</p>

Right-click actions

For charts, the first click or press selects the cell and the second selects the table. You see a blue border around the selected element.

Subsequent clicks or taps select the cell and then the table alternately.

For tables, the first click selects the data point and the second click selects the chart. You see a blue border around the selected element.

Subsequent clicks or presses select the feed and then the chart alternately.



Visualization	Actions available
Chart	<ul style="list-style-type: none">• Comment on the chart you selected• Apply/remove element link (if you click a specific data-point)
Table	<ul style="list-style-type: none">• Copy cell content• Comment on cell• Apply/remove element link

Mouse hover

Hovering over a chart displays a tooltip that provides more information on the datapoint your hover over.

5.1.5 Undoing and redoing actions

When you have second thoughts about certain actions, you can use a toolbar icon to undo them and check the way your data displayed previous to the action. You can then redo the action, when you appropriate.

Click or tap the  icon to undo a previous action. Click or tap the  to redo the action you've just undone.

5.1.6 Reports with element links

Web Intelligence Interactive Viewer calls your attention to element links in a report when you open the report so you know your direct actions may impact the data displayed.

Element links create a parent-child dependency between at least two report elements so a filter applied to the parent element impacts the data display in the child elements. When a report contains element links, you can apply a filter to the parent element with a direct action of a click or a tap.

When you first open a report that contains element links, the parent elements display with a blue border. Also, when you click or tap a value in a parent element to filter a child element, a message confirms the filtering action and value.


5.2 Answering prompts

Prompts limit the data returned from the data source when you refresh the document so you benefit from both an optimal refresh time and a focused selection of data to analyze.

A prompt is a dynamic filter in the form of a question that you're asked each time you refresh a document.

Each prompt is composed of a message, an operator and a object. To respond to the prompt, you can either type a value or select it from a list. The query then retrieves only the data related to the values you have selected.

Prompts allow multiple users who view a single document to specify different subsets of the database information and display them in the same report tables and charts. They also limit the data retrieved from the data source and, in turn, minimize the time it takes to retrieve the data.

Prompts can be either mandatory or optional. When you refresh a document, you have to answer all the mandatory prompts. A blue star  shows next to each mandatory prompt.

Note

You can only access prompts created by the report designer in Web Intelligence. You can't add prompts to a report in Web Intelligence Interactive Viewer.

Related Information

[Prompt variants \[page 18\]](#)

[Prompt settings \[page 19\]](#)

[To access the prompts settings \[page 19\]](#)

5.2.1 Prompt variants

You can save a group of often-used variable value sets as a prompt variant.

In the [Prompts](#) dialog box, after you've selected the values for each prompt, you can give a name to the set of variable values and save them as a prompt variant. Subsequently, the prompt variant is available to you in the dropdown list.

For example, if you are a regional manager with multiple branches in your region, you can create a prompt variant for each branch. Then, when you refresh a report and select a prompt variant for branch A, the document displays only the data for branch A.

5.2.2 Prompt settings


You can access prompt settings.

The available settings are detailed in the table below.

Option	Description
Match case	<p>The search is case-sensitive.</p> <p>This option is not available when the Search keys or Database search options are selected.</p>
Database search	<p>The search includes all the values stored in the database rather than restricting the values to the ones loaded into the list. It improves search accuracy but reduces search speed.</p> <p>This option is available only in lists of values that support database searches.</p> <p>Database searching improves search accuracy at the cost of performance. It is useful when not all values in the list of values were retrieved. This can happen when the total number of values in the list exceeds the Max rows retrieved query property.</p> <p>Database searching is particularly useful when the list of values is hierarchical because values are loaded from the database only in response to their parent value being expanded in the hierarchy. For example, in a geographical hierarchy, the child values of the California value (cities in California) are not loaded from the database until the value is expanded. If the option is selected, the search includes these items even when the California value has not been expanded.</p>
Search by keys	<p>The search uses unique value keys rather than display values.</p> <p>This option is available only in lists of values that support key values.</p>
Show keys	Select whether you want to enable a search for values using their keys.


5.2.3 To access the prompts settings

1. In the [Prompts](#) dialog box, select a prompt.




2. Click or tap the cogwheel  icon.

5.3 Folding and unfolding report elements

You can focus on the key data in your report and hide the rest, by unfolding the report elements with the key data and folding all others.

You can fold and unfold sections, breaks and tables. To enable folding actions click or tap the [More...](#)  icon in the toolbar and select [Enable folding actions](#).

The icons that allow you to fold or unfold data display next to the report elements:

- The  icon folds the data.
- The  icon unfolds the data.
- The  icon gives you access to a menu of more than one folding action.

You can also right-click a section to access actions for all the sections in your report.

Depending on the report element, the data is displayed or hidden in different ways.

Report element	Result
Section	When a section is folded, only the section and free cells associated with the section display. All section details are hidden.
Table or break	When a table or break is folded, the rows or columns are concealed, and only headers and footers are displayed. Tables must have headers and footers to be folded and unfolded. Vertical tables, horizontal tables and cross tables can be folded and unfolded.

Related Information

[To fold and unfold report elements \[page 20\]](#)

5.3.1 To fold and unfold report elements

Fold report elements to hide the data unrelated to your analysis and unfold the ones that show the most meaningful data.

1. Click or tap the [More...](#)  icon and select [Enable folding actions](#).



The icons for folding and unfolding report elements display.



2. Click or tap the icons to unfold the data you want to analyze and to fold the rest, as necessary.
3. Optionally, to access folding actions for all the sections, right-click a section.

4. Optionally, to disable the folding actions, click or tap [More...](#)  icon and select [Disable folding actions](#).

5.4 Collapsing and expanding hierarchical data

When your report includes hierarchical data, you see the data organized in different hierarchical levels with the measures aggregated for each hierarchical level. You can expand and collapse the hierarchical data to analyze the data at the level of detail that interests you.

You expand and collapse the hierarchical data as a direct action with a simple click or tap. Click the  icon to expand the children values of the current hierarchy value or the  icon to collapse the children values.

You can determine the drill focus by right-clicking or pressing a hierarchical data value. Then, select the  icon or the  according to the direction of your drill focus.

For example, in a [Geography] hierarchy, you can navigate to and analyze the [Revenue] measures for [USA] and for the more detailed levels of [California] and then, of [San Francisco] and [Los Angeles].



Whether or not your report includes hierarchical data depends on the data source.

Related Information

[To expand and collapse hierarchal data \[page 21\]](#)

5.4.1 To expand and collapse hierarchal data

In a table with hierarchical values, you can expand or collapse child members of the current hierarchical data value.

1. To expand the child members, click the  icon for the hierarchical data value.
2. To collapse the child members, click the  icon for the current hierarchical value.

5.5 Commenting on report data

Collaborate more effectively with your coworkers by exchanging information about the report data in comments, right where you see the data.

When you add a comment to a report element, a yellow ribbon  displays on the report element so anyone who opens the report can identify it quickly.

To read the comment in a tooltip, click or tap the yellow ribbon. When there's a comment thread, or more than one comment, for the report element, the tooltip shows only the first or last comment, depending on the report design.

To display all the comments in a thread in the left panel and edit, add, or delete them, from the tooltip, click or tap [Open thread](#).

Depending on your rights, you can view, add, edit, and delete comments on the following report elements:

- Sections
- Tables or charts
- Report cells
- Table cells

Related Information

[To view comments in a report \[page 22\]](#)


[To add comments to a report \[page 23\]](#)

[To edit comments in a report \[page 23\]](#)

[To delete comments from a report \[page 23\]](#)

5.5.1 To view comments in a report

Read report comments and comment threads.


1. Place the cursor on the yellow ribbon .
2. 
3. Click or tap the ribbon.
The comment displays in a tooltip.
4. To display all the comments in a thread, click or tap [Open thread](#).

All the comments in the thread display in the left panel where you can edit, add, or delete the comments, depending on your rights.

5.5.2 To add comments to a report

Add comments to a report to exchange information about the data with your coworkers.

1. Right-click or press the report element where you want to add your comment.


2. Click or tap the  icon.

The *Comments* area displays in the left panel.

3. Type your comment and click or tap *Save*.



5.5.3 To edit comments in a report

Edit the text in an existing comment to update or correct it.

1. Place the cursor on the yellow ribbon .
2. Click or tap the ribbon.
3. Click or tap *Open thread*.
4. Edit the comment text and click or tap *Save*.

5.5.4 To delete comments from a report

Delete comments when they are not relevant for the report's target users.

1. Place the cursor on the yellow ribbon .
2. Click or tap the ribbon.
3. Click or tap *Open thread*.
4. Click or tap the  icon for the comment.

6 Filtering in Web Intelligence Interactive Viewer

Filters give you an opportunity to focus your analysis on the data directly related to your business questions, free from the distraction of unrelated data.

All the controls that limit the data in your report – prompts, input controls and drill filters – are in the [Filters](#) menu on the toolbar.

Unlike prompts, which you define at refresh to limit the data returned to your report from the data source, filters limit the data that displays in your report. You can change the values of filters any time you want to shift the focus of your analysis.

This section covers the following filter types and their use:

- Input controls and filter paths
- Element links
- Drilling

Related Information

[The Filters menu \[page 15\]](#)

[The Prompt Summary \[page 15\]](#)

[Answering prompts \[page 18\]](#)

[Input control and filter path values \[page 15\]](#)

[Input controls \[page 24\]](#)

[Element links \[page 27\]](#)

[Drilling \[page 28\]](#)

6.1 Input controls

Input controls provide you with a convenient and easy way to filter report data for accurate analysis that does not require extensive experience with Web Intelligence Interactive Viewer.

The input controls display next to the prompts in the [Filters](#) menu.

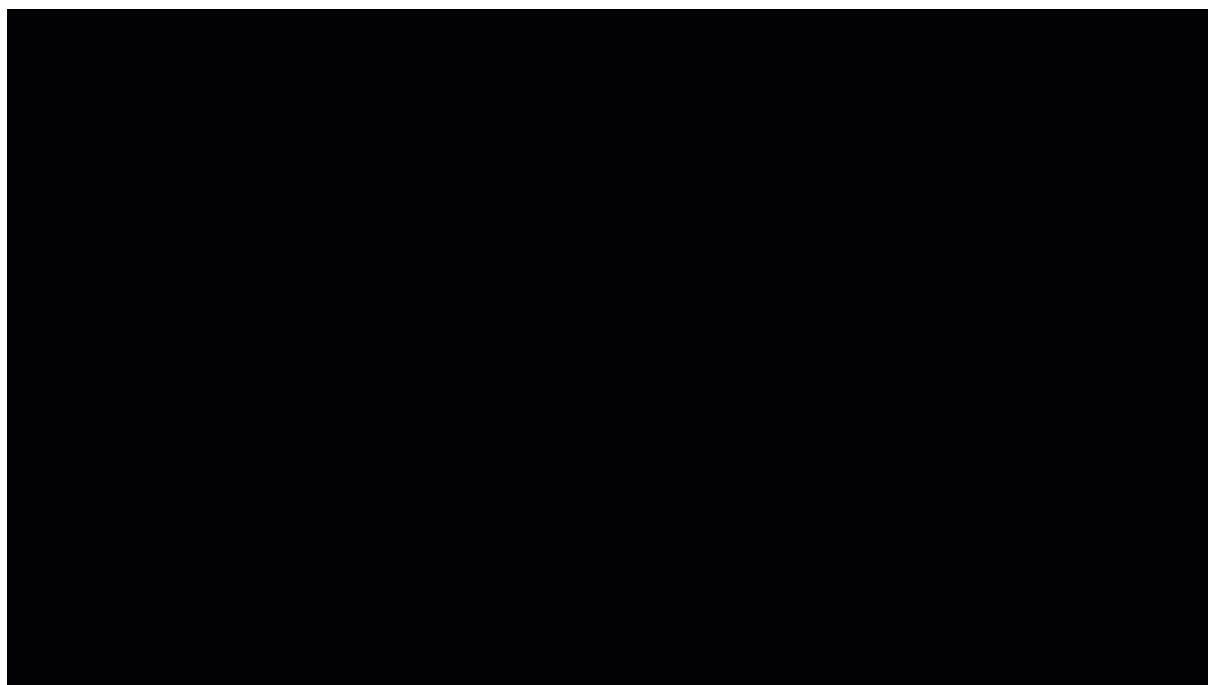
When you select a value for an input control, you filter the data in the associated report elements by the value you have selected. Input controls are predefined and created by the report designer in Web Intelligence. They can be grouped to enable dynamic filtering, and restrict possible values for each input control in a group according to your successive selections.

If there are groups of input control in a report, you work with what's called a filter path. The filter path is a visual representation of the values you have successively selected for several input controls that your report designer has purposely grouped together. It allows you to control the progressive restriction of your data.

Note

You can only select values of input controls created by the report designer in Web Intelligence. You can't add input controls to a report in Web Intelligence Interactive Viewer.

Example



Related Information

[To select a value for an input control \[page 26\]](#)

[To edit the value of an input control \[page 26\]](#)

[To reset the value of an input control \[page 26\]](#)

[To create a filter path \[page 26\]](#)

[To add an input control to the filter path \[page 27\]](#)

[To remove an input control filter from the filter path \[page 27\]](#)

6.1.1 To select a value for an input control

1. Click or tap the name for an input control.
2. Select a value.
3. Click *OK*.

The value selected now shows below the name of the input control, and the report displays only the data related to the value.

6.1.2 To edit the value of an input control

1. Click or tap the input control you want to edit.
2. Edit the value.
3. Click or tap *OK*.

The new value now shows below the name of the input control, and the report displays only the data related to the value.

6.1.3 To reset the value of an input control

When you reset the value of an input control, you change it to the default value defined by the report designer.



1. Click or tap the input control whose value you want to reset.
2. Click *Reset*.

The default value now shows below the name of the input control, and the report displays only the data related to the value.

6.1.4 To create a filter path

If your report contains a group of input controls created by the report designer, you can create what's called a filter path by selecting values successively for at least two input controls of the group.

The filter path allows you to restrict the data more precisely. Each time you select a value for an input control, the number of possible values for the next input control is reduced. Its display gives you a clear understanding of the data you are analyzing in a glance.

1. In the *Filters* menu, click or tap the name of the group.
2. Click or tap the  icon to the left of the group name.
3. Click or tap the  icon.
4. Select an input control.


5. Select a value.
The selected value now shows below the name of the input control, and the report displays only the data related to that value.
6. Repeat the steps above for at least another input control to create a filter path.
The value for each additional input control shows below the name of the input control, and the report displays only the data related to the additional value.

6.1.5 To add an input control to the filter path

You can add an input control to an existing group and make it part of an existing filter path.


Note

The input control you add has to be part of the same group of input controls that are in the existing filter path.

1. Expand the group to which you want to add a input control.
2. Click or tap the  icon.
3. Select an input control.
4. Select a value.
The value for the additional input control shows below the name of the input control, and the report displays only the data related to the additional value.

6.1.6 To remove an input control filter from the filter path

1. In the [Filters](#) menu, tap or hover your mouse over the input control you want to remove.

This icon  displays to the right of the input control.

2. Click or tap the icon.
The report now displays the data previously restricted by the input control.



6.2 Element links

Element links are another kind of input control. When you select a value in one element, that value filters the data displayed in the other linked elements.

Element links create a parent-child dependency between at least two report elements, and add dynamic filtering to a report. The value you select in the parent element filters the data displayed by one or more children report elements.

When you first open a report that contains element links, a blue border appears around the parent elements to indicate that you can use them to filter data in the child elements. After you select a value in the parent element, a message confirms the filtering action and value and a blue border highlights the filtered child element. When the filtering is complete, a blue border highlights the value in the parent element for which you filtered.

You can apply a filter with a direct action of a click or tap of the value in the parent element. To remove the filter, click or tap the value again.

When active, element links are represented by this icon  in the *Filters* menu. Click or tap it to see the object that is filtered. From here, you can also delete the object by clicking or tapping the  icon.

Caution

If drill filters are enabled in a report, then you cannot use element links.

Note

You can only use element links created by the report designer in Web Intelligence. You can't create element links in Web Intelligence Interactive Viewer.

Related Information

[Reports with element links \[page 17\]](#)

6.3 Drilling

Drilling lets you look deeper into your relational data to discover the reasons behind good or bad results displayed in tables, charts or sections.

It's a quick and easy way to get access to the data you are most interested in, and is readily available to you in your report. When you drill up or down on an object, the dimensions and values that you select display in the *Filters* toolbar.

Drill filters use the "Equal to" operator so you can only select one value per filter.

You can either drill directly from a report element or use the drill filters at your disposal in the *Filters* menu. You drill down with a direct action of a click or tap of a cell or of a data point. To choose between drilling down or up, right-click the report element.

Note

If you enable drilling in your reports, you cannot use element links.

Want to know more about hierarchical navigation?

You can drill on both relational and hierarchical data in the Interactive Viewer. When navigating through hierarchical data, you switch the drill focus of the data so that you can explore the hierarchy.

Note

Hierarchy drilling is possible even if the *Enable drilling* option is disabled.

For more information about hierarchical data navigation, see [Working with hierarchical data](#).

Related Information

[Drilling along a drill path \[page 29\]](#)

[To drill on a dimension from the Filters menu \[page 30\]](#)

[To drill on a dimension from a report element \[page 30\]](#)

[To edit or reset a drill filter \[page 31\]](#)

[To remove a drill filter \[page 31\]](#)

[To enable drilling \[page 30\]](#)

6.3.1 Drilling along a drill path

When you drill on your data, you move along a drill path that takes you to various levels of detail in the data.

These paths are based on the dimension hierarchies set by the designer of the universe. Universe designers organize objects in classes in a hierarchy with the summary objects at the top and the most detailed at the bottom.

For example, if the data from [Quarter] did not sufficiently explain a result, you could drill down to [Month] or [Week], depending on how the universe designer set up the hierarchy. When you drill to a different level, measures, such as a [Revenue] or [Margin], are recalculated accordingly.


Drill paths usually follow the same hierarchy order as the classes on a universe. For example, a class called Time typically includes the [Year] dimension at the top of the class, followed by the [Quarter], [Month], and [Week] dimensions. The hierarchies for drill within the Time hierarchy typically follow the same order, because users want to drill annual results to analyze details for quarter, month, and so on. However, the universe designer can also define custom hierarchies.

As you drill along a drill path, you can also use drill filters to restrict the data that shows at each level of detail. When you edit or reset a drill filter, your report will then reflect the change in the filter values, but stay at the same level of detail in the drill path.

For example, let's say your original filter value for [Year] was 2015 and you drilled down to the [Quarter] level. Your report displays the [Revenue] and [Margin] for Q1 2015, Q2 2015, Q3 2015, and Q4 2015. When change the value of the drill filter to 2016, your report reflects that change by showing the measures for the year 2016, but remains at the [Quarter] level so you see the measures for Q1 2016, Q2 2016, Q3 2016, and Q4 2016.



6.3.2 To enable drilling



1. Click the  menu in the toolbar.
2. Check the *Enable drilling* option.


6.3.3 To drill on a dimension from the Filters menu

Apply a drill filter to your report to limit the data that it displays. You can only use drill filters in Web Intelligence Interactive Viewer when the report designer has enabled drilling.

1. In the *Filters* toolbar, click or tap the  icon next *Drill filters*.
2. Click the  icon.
3. Select a dimension.
The report displays the data for the dimension filtered for *All Values*.
4. Select a value.
5. Click or tap *OK*.
The report displays only the data related to the selected filter value.

6.3.4 To drill on a dimension from a report element


Drill up or down on a dimension from a report element to follow the drill path to different levels of the data.

An  icon is displayed in the column header of the dimension to which the drill filter is applied when you open a report.

Note

The icon is not displayed if a drill down action has been performed before you opened the document.

1. Click or tap a cell in a table, a column header or a data point in a chart to drill down. Right-click the cell, column header, or data point to choose between drilling up or drilling down.

The report page displays the drill  icon next to the column header to let you know that a drill filter is active. In the *Filters* menu, the drill filter displays.
2. **Optional:** Repeat the step above to drill further.
3. To drill back up, go to the *Filters* menu and manually delete the filters.

6.3.5 To edit or reset a drill filter


After you edit or reset a filter, your report data reflects the change in filter value, but does not change the level of detail you reached in the drill path before the change. A reset restores the filter value to the default of all values for the filtered dimension.

Drill filters are enabled in Web Intelligence Interactive Viewer if the the report designer enabled filters in the document.

1. In the *Filters* menu, click or tap the drill filter you want to edit.
2. To edit the value, select a new value. To reset to the default, click or tap *Select all*.
3. Click or tap *OK*.

The report displays the data related to the value.

6.3.6 To remove a drill filter

1. In the *Filters* toolbar, hover over your mouse or tap the drill filter you want to remove.
2. Click or tap the  icon to remove the filter.

Note

The level of the drill is not reset when removing a drill a filter. In you drilled down from Year to Month for instance, removing the drill filter does not reset the data to the Year level.

7 Organizing data in Web Intelligence Interactive Viewer

You can organize and order data with ranking and sorting.

This section describes the principles for data manipulation and how to rank and sort the data in your report.

7.1 Ranking

You can use the ranking technique to filter the data in your report.

Ranking allows you to isolate the top and bottom records based on different criteria and answer multiple business question such as:

- Which 3 regions generate the most revenue?
- Which are the bottom 10% of stores in terms of revenue generation?
- What is the group of the best-performing stores that generates a combined revenue of up to \$10,000,000?

To answer these questions, several parameters help you tailor the results you are going to get after you've ranked the data. You can find these parameters in the table below.

Parameter	What it does
<i>Top/Bottom</i>	<p>When the calculation mode is set to <i>Count</i>, the ranking returns the top/bottom n records based on the measure specified as the <i>Based on</i> parameter. For example, the top 3 countries by revenue generated, the bottom 3 year/quarter combinations by revenue generated.</p> <p>When the calculation mode is set to <i>Percentage</i>, the ranking returns the top/bottom n% of the total number of records based on the measure specified as the <i>Based on</i> parameter. For example, if there are 100 records and you rank the top 10%, the ranking returns the top 10 records.</p> <p>When the calculation mode is set to <i>Cumulative Sum</i>, the ranking returns the top/bottom records, for which the cumulative sum of the measure specified as the <i>Based on</i> parameter does not exceed the value specified in the top/bottom parameter.</p> <p>When the calculation mode is set to <i>Cumulative Percentage</i>, the ranking returns the top/bottom records, for which the cumulative sum of the measure specified as the <i>Based on</i> parameter does not exceed n% of the total of the measure, specified in the top/bottom parameter.</p>
<i>Based on</i>	The measure on which the ranking is based.

Parameter	What it does
<i>Ranked by</i>	<p>The ranking dimension. If you specify a ranking dimension, the aggregated values of the <i>Based on</i> parameter, calculated for the dimension, determine the ranking. If you do not specify this dimension, the values of the <i>Based on</i> parameter calculated for all dimensions in the block determine the ranking. In other words, the ranking returns the top/bottom X rows in the block based on the measure.</p> <p>The ranked by dimension does not need to be part of the block where the ranking is applied. However, in this case, the ranked data cannot be sorted.</p>
<i>Calculation mode</i>	The type of calculation used to create the ranking.

Example



Related Information

[To create a quick ranking \[page 34\]](#)


[To create a ranking \[page 34\]](#)


[To edit a ranking \[page 34\]](#)

[To remove a ranking \[page 35\]](#)

7.1.1 To create a quick ranking


You can create a quick ranking by selecting a report block or a feed directly.


Make sure that ranking is enabled in the  menu.

1. Select a report block or a feed.
2. Click or tap the *Rank*  icon.
If you have selected a feed and it's a measure, the *Rank* dialog box opens with the *Based on* field prefilled. If you have selected a feed and it's a dimension, the *Rank* dialog box opens with the *Ranked by* field prefilled.
3. Select whether you want to return top or bottom records and how many.
4. Do one of the following:
 - If you are ranking on a measure, click or tap *OK*.
 - If you are ranking on a report block or a dimension, select a measure in the *Based on* field and click or *OK*.


The report page displays the data with the quick ranking applied.

7.1.2 To create a ranking

Make sure that ranking is enabled in the  menu.

1. Click or tap the report block you want to rank.
2. Click or tap the rank  icon.
3. Fill in the different fields.
The *Ranked by* and *Calculation mode* parameters are under *Advanced*.
4. Click or tap *OK*.

7.1.3 To edit a ranking

1. Click or tap the report block whose ranking you want to edit.
2. Click or tap the rank  icon.
3. Edit the values and parameters you want.
4. Click or tap *OK*.

7.1.4 To remove a ranking

1. Click or tap the report block whose ranking you want to remove.



2. Click or tap the rank icon.
3. Click or tap [Remove](#).

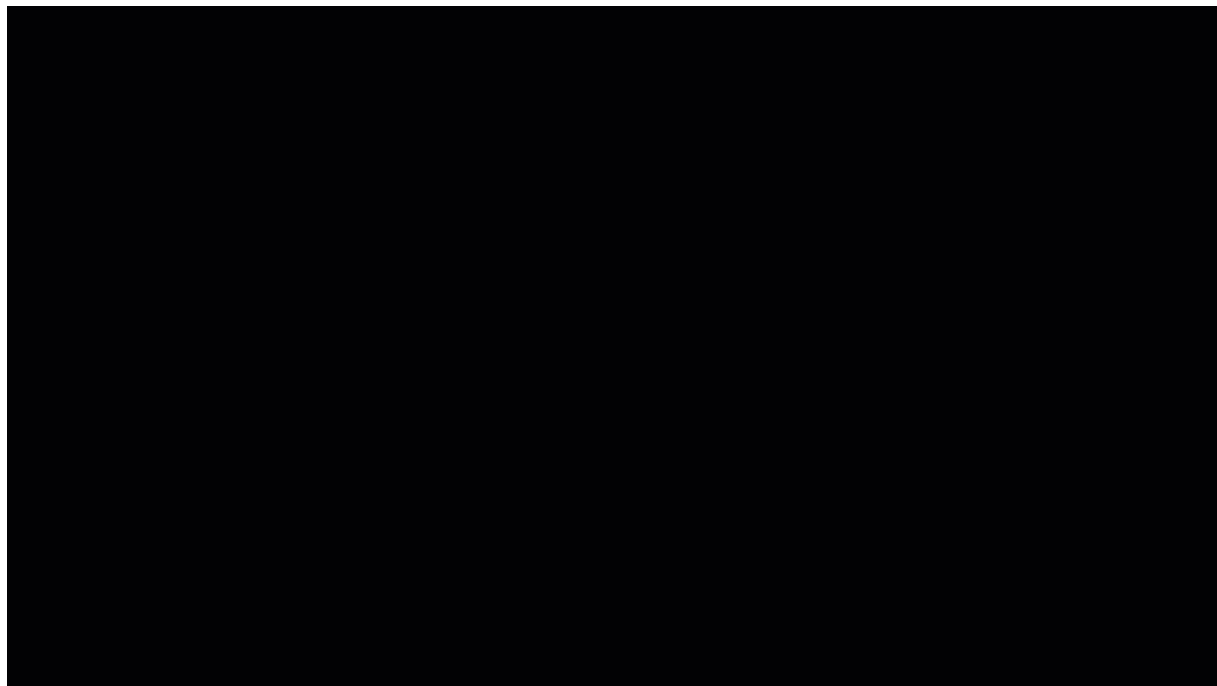
7.2 Sorting

Sorting values displayed in tables, charts and sections allows you to organize the order in which they appear in the report.

By default, sorts always start from the first column. The table below describes the different parameters available.

Parameter	What it does
Default	Depending on the type of data in the column or row, the results are sorted as follows: <ul style="list-style-type: none">• ascending numeric order for numeric data• ascending chronological order for date• alphabetical order for alphanumeric data
Ascending	When selected, results are arranged in ascending order, starting with the smallest value at the top of the column. For example: 100, 200, 300 or California, Colorado, Florida.
Descending	When selected, results are arranged in descending order, starting with the highest value at the top of the column. For example: 300, 200, 100 or Florida, Colorado, California.

Example



Related Information

[To add a sort to a report block \[page 36\]](#)


[To add a sort to a specific feed \[page 37\]](#)





[To remove one or all sorts from a report block \[page 37\]](#)

[To remove a sort from a specific feed \[page 37\]](#)

[To manage sort priority \[page 38\]](#)


7.2.1 To add a sort to a report block

Make sure that sorting is enabled in the  menu.

1. Click or tap a report block.
2. Click or tap the sort  icon.
3. Click or tap the  icon.
4. Select the column of the report block you want to sort in the dropdown list.
5. Click or tap  for an ascending sort or  for a descending sort.





The report block displays the sorted data.

7.2.2 To add a sort to a specific feed

Make sure that sorting is enabled in the  menu.


The feed you want to use for the sort may be in a column for a vertical table, a row for a horizontal table, or a cell for a cross table.



1. Click or tap the feed twice.
2. Do one of the following:

- Click or tap the sort  icon once for an ascending sort.
An up arrow shows in the upper right corner of the icon .
- Click or tap the sort  icon twice for a descending sort.
A down arrow shows in the upper right corner of the icon .


The report block displays the sorted data.

7.2.3 To remove one or all sorts from a report block

Make sure that sorting is enabled in the  menu.




1. Click or tap a report block.
2. Click or tap the sort  icon.
3. In the *Sort* dialog box, click or tap either the  icon to remove a specific sort or *Remove All* to remove all sorts.
4. Click or tap *OK*.

7.2.4 To remove a sort from a specific feed

Make sure that sorting is enabled in the  menu.

The feed from which you want to remove the sort may be in a column for a vertical table, a row for a horizontal table, or a cell for a cross table.

1. Click or tap the feed twice.
2. Do one of the following.

- If the sort was ascending, click or tap the sort  icon twice so it displays without an arrow .
- If the sort was descending, click or tap the sort icon  once so it displays without an arrow .

7.2.5 To manage sort priority

Make sure that sorting is enabled in the  menu.



1. Click or tap a report block.
2. Click or tap the sort  icon.
3. In the [Sort](#) dialog box, click the up  and down  arrows to define the priority among several sorts.
4. Click [OK](#).

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