Getting Started with SAP BusinessObjects Web Intelligence
## Content

1. **About this guide.** ................................................................. 3
2. **What is SAP BusinessObjects Web Intelligence?.** ......................... 4
3. **What are the sales and profit figures by product line and state?** ............ 6
   3.1 Accessing the Web Intelligence HTML interface in the BI launch pad. .......... 7
   3.2 Creating the query. ............................................................... 9
   3.3 Customizing the report. .......................................................... 15
      To customize a table in the report. .............................................. 15
      To change the report title and name. ........................................... 16
      To change the page layout. ....................................................... 18
      To create a stacked column chart in the report. ............................. 19
      To create a pie chart in the report. .............................................. 22
      To add an image to the report header. ......................................... 26
      To insert and format two cells in the report footer. .......................... 30
      To save the document in PDF format. ......................................... 32
1  About this guide

If you are a business analyst who is using Web Intelligence for the first time, then this guide will help you to understand what Web Intelligence is and how to use it to search your company’s databases for answers to typical business questions.

You can view videos of Getting Started with SAP BusinessObjects Web Intelligence scenarios on the SAP Community Network.
2 What is SAP BusinessObjects Web Intelligence?

SAP BusinessObjects Web Intelligence (referred to simply as Web Intelligence in this guide) is a tool in the SAP BusinessObjects Business Intelligence platform that you can use to access your data wherever it is stored so that you are kept up to date with what’s going on, and can share the information with others.

Web Intelligence uses familiar business terms and offers a drag-and-drop interface.

You can do the following:

● Answer very broad or narrow business questions.
● Create and update reports based on your business requirements.
● Access and combine data from various data sources, including relational and online analytical processing (OLAP) databases, Excel spreadsheets, and even text files.

Web Intelligence has three different interfaces, or versions:

<table>
<thead>
<tr>
<th>Interface</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Intelligence HTML interface</td>
<td>Also sometimes referred to as the DHTML interface.</td>
</tr>
<tr>
<td></td>
<td>You can launch this interface in the BI launch pad.</td>
</tr>
<tr>
<td></td>
<td>We are using the Web Intelligence HTML interface for the first business question in this guide. X-ref to scenario 1.</td>
</tr>
<tr>
<td>Web Intelligence Applet interface</td>
<td>Also sometimes referred to as the Java applet.</td>
</tr>
<tr>
<td></td>
<td>You launch this interface in the BI launch pad.</td>
</tr>
<tr>
<td></td>
<td>We are using the Web Intelligence Applet interface for the second business question in this guide. X-ref to scenario 2.</td>
</tr>
<tr>
<td>Web Intelligence Rich Client interface</td>
<td>Also referred to as Desktop. You install this interface on your computer through the BI launch pad or as a part of a BI platform installation.</td>
</tr>
</tbody>
</table>

What are data sources?

A data source, also called a data file in some contexts, is a collection of stored data. In Web Intelligence, you answer business questions by expressing the question in the form of a query, and when you run the query, it searches the data source to answer your question. For example, you can use a query to ask for the sales margins per product over a time period.

What are universes?

A universe represents a preselected set of data from a complex data source. The eFashion universe, used in Scenario 1, contains measures, dimensions, and attributes that you combine using a query.
A dimension is a collection of related data members that represent aspects of a business; for example, products or sales. A hierarchy is a set of dimension members that are arranged in levels or parent-child relationships.

Measures retrieve data, usually numeric, that is the result of calculations on data in the database.

An attribute provides descriptive data about a dimension or hierarchy, for example Birthdate can be an attribute of a Customer dimension.

The sample universe eFashion used for scenario 1 is a national retail store eFashion that sells fashion merchandise in 11 US cities. In the eFashion information system, there is data that you can use to answer your business question. This data is available to you in the sample eFashion universe.

Note: For you to use this sample universe, your BI administrator needs to copy the eFashion universe and data source onto the BI platform server and allow access to your user profile.

**What is a BEx query?**

A Business Exchange (BEx) query is based on an SAP Info Cube in SAP Business Warehouse (SAP BW). It is also the data source used in Scenario 2. A BEx query is another form of preselected data.
3 What are the sales and profit figures by product line and state?

In this business scenario, as a business analyst in the Sales Management office of eFashion, you will create a report that shows the sales and profit figures for the eFashion product lines.

You will open and use the Web Intelligence HTML interface. You can also use the Web Intelligence Applet and Rich Client interfaces for this scenario; however you will encounter slight differences in the user interfaces.

What you will accomplish in this scenario

In this scenario, you will:

- Update your BI launch pad preferences to select the Web Intelligence HTML interface as the default interface.
- Select dimensions and measures to create a query on the eFashion universe.
- Use the dimensions and measure you selected in the query to create:
  - A table of data showing the important numbers by state
  - A stacked column chart with the sales revenue by product lines per quarter
  - A pie chart with the revenue by state
- Format the appearance of the report.

Prerequisites to complete if you wish to do this scenario yourself

To complete this scenario you need:

- to request that the BI administrator copy the eFashion universe and data source onto the BI platform server and allow access to your user profile
- an Internet browser installed on your PC
- a URL to the BI launch pad at your company or group
- your login name and password for the BI launch pad
- security rights to use the full Web Intelligence feature set and to access the eFashion universe
3.1 Accessing the Web Intelligence HTML interface in the BI launch pad

Before building your document in Web Intelligence, you need to log into the BI launch pad. You also need to be sure that the Web Intelligence HTML interface opens when you launch Web Intelligence in the BI launch pad.

1. Go to the SAP BI launch pad web site.
2. Enter your user name and password, and click Log On.
   
   The BI launch pad opens.

3. Click Preferences.

4. In the Preferences dialog box, select Web Intelligence in the side panel.

5. For the View and Modify settings, select HTML.
6. At the bottom of the dialog box, click **Save & Close**.

7. In the **Preferences Changed** dialog box, click **OK**.

8. In the BI launch pad, click the arrow next to **Applications** and select **Web Intelligence** from the dropdown list.

Web Intelligence opens.

You have logged into the BI launch pad, set the Web Intelligence HTML interface as your default interface for viewing and modifying Web Intelligence reports, and opened Web Intelligence itself. In the next section, you will use Web Intelligence to select data for your report.
3.2 Creating the query

In Web Intelligence, you are going to create a query using the following objects in the eFashion universe:

- **Dimensions:** Quarter, State, Lines
- **Measures:** Sales revenue, Margin, Quantity sold, Discount

1. Open the Web Intelligence HTML interface, and click the **New** icon.

   ![Web Intelligence interface with New icon highlighted]

   The **Create a document** dialog box appears.

2. To select your universe data source, click **Universe**, then **OK**.

   ![Create a document dialog box with Universe selected]

   The **Universe** dialog box appears.

3. Select the **eFashion** universe and then click **OK**.
The Query Panel appears.

4. In the Universe Outline pane, expand the Time period folder and select Quarter.
5. Click the right angle bracket (>) button next to the Result Objects pane.

➤ Tip

You can also drag and drop the Quarter dimension into the Result Objects pane.

The Quarter object appears in the Result Objects pane.

6. Expand the Store folder and select State.
7. Click the > button. The State object appears in the Result Objects pane.

8. Expand the Product folder to select Lines, and then click the > button. The Lines object appears in the Result Objects pane.

9. Expand the Measures folder to select Sales revenue and then press Ctrl and click Quantity sold, Margin, and Discount.
10. Click the > button.

The Sales revenue, Quantity sold, Margin, and Discount objects appear in the Result Objects pane.

11. Click Run Query.

When the query is run for the first time, Web Intelligence automatically creates a report and document and opens them in Design mode. All of the objects that you selected appear in the Available Objects list and in a table that you’re going to configure.
12. Click the **Save** icon.

The **Save As** dialog box appears.

13. In the **File Name** text box, enter **Sales report** and click **Save**.

In the next section, you will customize the report.
3.3 Customizing the report

When you run a query for the first time, a report appears with all of your data in one table.
1. In the report, you want to customize the table to show only the data you need.
2. Also, you want to create pie and column charts that show sales revenues by state and product line.
3. Finally, you want to add a few formatting elements to the reports.

3.3.1 To customize a table in the report

The table automatically contains all of the objects that you added to the query, but you don’t need all of the data in the table. Also, the default column widths are too narrow.
1. In the report, in the table created in the previous section, click in the Lines column and press Delete. Repeat this action for the Quarter column.

Your table now has only 5 columns.

<table>
<thead>
<tr>
<th>State</th>
<th>Sales reven</th>
<th>Quantity sol</th>
<th>Margin</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$7,479,569</td>
<td>46,074</td>
<td>$2,972,910</td>
<td>$1,299,910</td>
</tr>
<tr>
<td>Colorado</td>
<td>$2,060,275</td>
<td>12,737</td>
<td>$808,149</td>
<td>$343,370</td>
</tr>
<tr>
<td>DC</td>
<td>$2,961,950</td>
<td>18,744</td>
<td>$1,153,001</td>
<td>$582,601</td>
</tr>
<tr>
<td>Florida</td>
<td>$1,879,159</td>
<td>11,257</td>
<td>$777,281</td>
<td>$187,350</td>
</tr>
<tr>
<td>Illinois</td>
<td>$3,022,659</td>
<td>17,076</td>
<td>$1,254,003</td>
<td>$273,717</td>
</tr>
<tr>
<td>Massachusset</td>
<td>$1,283,707</td>
<td>7,676</td>
<td>$511,684</td>
<td>$246,788</td>
</tr>
<tr>
<td>New York</td>
<td>$7,582,221</td>
<td>46,358</td>
<td>$3,072,744</td>
<td>$780,708</td>
</tr>
<tr>
<td>Texas</td>
<td></td>
<td>62,347</td>
<td>$4,037,078</td>
<td>$1,253,653</td>
</tr>
</tbody>
</table>

Note

If nothing happens when you press Delete, make sure that you are in Design mode. You can’t delete columns in Reading mode.

In the table, the Texas sales revenue and table column titles are too long to display correctly with the default column width.
2. To resize the column to fit the data, double-click the right cell border. Repeat this action with each column to be sure that the width is suitable for the column contents.

<table>
<thead>
<tr>
<th>State</th>
<th>Sales revenue</th>
<th>Quantity sold</th>
<th>Margin</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$7,479,569</td>
<td>46,074</td>
<td>$2,972,910</td>
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</tr>
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<td>$2,060,275</td>
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<td>$2,961,950</td>
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<td>$1,153,001</td>
<td>$582,601</td>
</tr>
<tr>
<td>Florida</td>
<td>$1,879,150</td>
<td>11,267</td>
<td>$777,291</td>
<td>$187,360</td>
</tr>
<tr>
<td>Illinois</td>
<td>$3,022,658</td>
<td>17,976</td>
<td>$1,254,093</td>
<td>$273,717</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>$1,283,707</td>
<td>7,676</td>
<td>$511,684</td>
<td>$246,788</td>
</tr>
<tr>
<td>New York</td>
<td>$7,582,221</td>
<td>46,358</td>
<td>$3,072,744</td>
<td>$786,708</td>
</tr>
<tr>
<td>Texas</td>
<td>$10,117,664</td>
<td>62,347</td>
<td>$4,037,078</td>
<td>$1,253,653</td>
</tr>
</tbody>
</table>

3. Save the document.

3.3.2 To change the report title and name

By default, a free-standing cell was created that contains the report name. You want to change this to read Sales revenue data.

1. Select the Report 1 cell.

The Formula Bar becomes active. You’re not going to create a formula in this cell, but you need to use the Formula Bar to edit the text in this cell.

2. Type Sales revenue data in the text box, and click the green checkmark icon.
3. Click the *Formatting* tab.

4. In the *Style* subtab, click the *Underline* (U) icon to remove the underline format.

5. To increase the size of the text, in the *Font* subtab, click in the font size box, type 18 and press *Enter*.

6. To rename the report, click the *Page Setup* tab, and then select the *Rename Report* subtab.

7. In the text box, type *Sales revenue data* and press *Enter*.

The tab at the bottom of the report page shows the name you just typed.

8. Save the document.
3.3.3 To change the page layout

You can view the report in **Page** mode. In this mode, you can more easily envision the final appearance of your report. This mode shows the edges of each page, and you can tell if any objects are placed outside the page margins. You will also change the page layout to **Landscape**, so that you can fit next to and below the table charts that show supporting information in an attractive way.

1. First, go to the bottom of the Web Intelligence report and click the **Page** icon to change the layout mode to **Page** mode.

2. In the percent menu next to the **Page** icon, select **75%**.

3. To change the page layout, click the **Page Setup tab**, and then the **Page** subtab.

4. Click **Portrait** and select **Landscape** from the dropdown list.

The report page changes to landscape.

5. Adjust your browser window so that you can see the entire report page.
6. Save the document.

### 3.3.4 To create a stacked column chart in the report

You want to insert a stacked column chart in the report that shows the sales revenue by product line and sales quarter.

1. Click the *Report Elements* tab, and then the *Chart* subtab.

2. Click the *Insert a Column Chart* icon and select *Stacked Column*.

3. When the cursor changes to a plus sign, click in the report, next to the table.
4. You want to assign some data objects to this chart. In the Available Objects list, select Line, press and hold CTRL and click Quarter and Sales revenue, and then drag the selections to the empty chart.
Web Intelligence automatically assigns the objects to the appropriate areas on the chart.

The Quarter data for some of the columns is not visible and so you can expand the chart to the bottom of the page body.

5. Place the mouse over the bottom anchor of the chart object and drag down until it is twice the height of the table.
6. Save the document.

3.3.5 To create a pie chart in the report

You want to insert a pie chart that shows the sales revenue by state.

1. In the **Available Objects** list, select **State**, press and hold **CTRL** and click **Sales revenue**.
2. Click the **Report Elements** tab, and then the **Chart** subtab.
3. Click the **Insert a Pie Chart** icon. The cursor changes to a plus sign.

4. Click in the page just under the right corner of the table. The pie chart appears with the data you selected already assigned. It is cut off at the bottom because it has overlapped with the report footer.

5. Select the chart and resize it using the lower right chart anchor so that it does not overlap with the report footer.

You also want to have the percentage of revenue for each quartile appear in the chart.

6. Select the **Formatting** tab, and then in the **Chart Style** subtab, click the **Format Chart** icon.

The **Format Chart** dialog box appears.
7. Click the **Data Values** tab, then select **Data Label Displaying Mode** and click **OK**.
Percentages appear in the chart.

8. Save the document.
3.3.6 To add an image to the report header

You want to add an image that says “Confidential” to the header report element.

1. In the report, hover your mouse in the upper part of the page until the header report element appears, and then click in that area.

2. Select the **Formatting** tab, and then in the **Tools** subtab, click the **Formatting** icon.

The **Format header** dialog box appears.
3. Select the Appearance tab and select the Image from file option.

4. Click Add.
The Upload Image dialog box appears.

5. You want to use an image file saved to your computer, so click Browse.

6. Click image_confidential.gif and then Open.

The address for the file appears in the Upload Image dialog box.

7. Click Upload and then Apply in the Format header dialog box.
The Format header dialog box remains open, but your changes in the dialog box are applied to the Header report element. You’d like to change the position of the image in the header field.

8. In the Format header dialog box, change the Position from Left to Center.

9. Click Apply.

The image is centered in the Header report element.

10. Click OK to confirm your changes and close the Format header dialog box.

11. Save the document.
3.3.7 To insert and format two cells in the report footer

You want the date of the last time the report was refreshed to appear in the report footer element.

1. In the report, select the Report Elements tab and then the Cell subtab.

2. Click the Pre-Defined button, select Last Refresh Date from the dropdown list and with your mouse click in the middle of the report footer element.

A cell appears that contains the last date the report data was refreshed.

You want to add a label in front of this cell to indicate what this date represents.

3. In the Report Elements tab, in the Cell subtab, click the Blank button and move your mouse down to click in the footer report element in front of the Last Refresh Date cell.

The cell appears in the footer report element.

4. Drag the lower cell border down to where it is even with the Last Refresh Date cell.

5. In the Formula Bar, enter Report last refreshed: in the text box and click the green checkmark icon.
6. To resize the cell, click the right cell border and drag it right until you see all the text.

7. To remove the bottom border from the cells, click the cell and then press and hold \texttt{CTRL} and click the \textit{Last Refresh Date} cell, so that both cells are selected.

8. Select the \textit{Formatting} tab, and then the \textit{Border} subtab.

9. Click the \textit{Borders} icon.

The border on the bottom of the cells is gone.

10. To change the font size of the text, make sure that both cells are still selected.
11. Select the \textit{Formatting} tab, and then select the \textit{Font} subtab.
12. From the font size list, select 10.

The font size in the cells changes to size 10.

13. Save the document.

3.3.8 To save the document in PDF format

You want to distribute the report you just created in PDF format.

1. Go to the File menu and click the Export icon.
2. From the dropdown list, click *Export Document As* and then *PDF*.

3. When you are prompted to choose *Save* or *Save as*, choose *Save As* and save the document to your local computer.

You now have a professional-looking document that presents your information in a format you can send or share easily.
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