

Business Objects 4.1 Quick User Guide

Log into SCEIS Business Objects (BOBJ)

- 1. https://sceisreporting.sc.gov
- 2. Choose Windows AD for Authentication.
- 3. Enter your SCEIS User Name and Password:

	prmation, and click "Log On". our account information, contact your system	
User Name	cor75480	
Password	:	
Authentication	Windows AD 🗸	
8.23		
Str. 2002	Log On	
1		He

Home Screen View:

This is the view that will appear once you login:

	My Recently Viewed Documents	▼ 11 unread messages in My Inbox	 My Applications
Reports that have been viewed recently	SCEIS Budget Vs Actual Doll+10-09_15-47-33 Grave Participation and Actuals Grave Participation and Actuals Grave Budget vs Commitments and Actuals Grave Budget vs Commitments and Actuals Official SCEIS FI - Summary of Expenditures (424 Equivalent) Official SCEIS FI - Available Cach (404 Equivalent) Undrospot Logal : 87404 Budget Actual Scorecard (Fe, New Grave Fract Octavity) Grave Fract Octavity	GRVEP Import : 95405 Analysis Edition for OPAP Koso Sales and Ube Tax Report : 91743 OPAP Koso Sales and Ube Tax Report : 88371 Sto Sales and Ube Tax Report : 88371 Sto Sales and Ube Tax Report : 88371 Sto Sales Analysis New : 87623 Sto Sales Analysis New : 87523 Web Intelligence Sto Sales ube Tax : 85195 GRVEP Tex : 78261 GRVEP Tex : 7386 Sto Sales up mod : 7336	> % > %
		See more	
	 My Recently Run Documents 	▼ 0 Unread Alerts	5
Most recently scheduled report instances	P Official SCEIS FI - Available Cash (404 Equivalent)	No unread alerts	
		See more	



Personal (Favorites) Folder:

Reports placed here can only be accessed and modified by you.

Home Documents	Home Documents								
View - New - Organize - Send - More Actions - Details									
My Documents		Title 🔺	Туре	Last R					
🖹 🚧 My Favorites		~WebIntelligence	Folder						
		BD	Folder						
BD		Test	Folder						
		Official SCEIS FI - Analysis of Expenditures by Minor Commitment Item (427 Equivalent) ch 092	Web Intelligence						
	Ð	Analysis autosave	Analysis Workspace						
Inbox		Asset_History_Sheet510194log2b	Text						
My Alerts		Asset_History_Sheet510194log2b	Agnostic						
		Book1	Microsoft Excel						
	-	budvsact test 09082014	Web Intelligence						

Public Folders:

Personal (Favorites) vs. Public Folders and Categories

Personal folders and categories are those you create for you, and cannot be viewed by any other user. This is called "My Favorites" in the tree panel.

Public folders and categories are created by the Business Objects team, and can be viewed by users, depending on their security access. You will have access to run reports in these folders, but you cannot edit them unless you save a copy in your personal folder, or if you are the owner of the report.

You will find your agency's shared folder (in the "SCSG" folder) here along with other enterprise reports and report templates in the "SCSG Enterprise" folder.

Note: To keep documents and reports in public folders/categories accurate and up-to-date, users can only save and publish objects to their agency's public folder or favorites folder. The chart below shows what you can and cannot do with objects in public folders/categories.

Can:	Cannot:
View objects in public folders	Delete or Cut and Paste objects in public folders
Copy objects from public folders to personal folders	Save objects to public folders other than their agency's
Save objects to their agency's public folder	Create new public folders
	Delete public folders



To search for a report:

1. Select the folder that you'd like to search, enter the search criteria and select the magnifying glass icon next to the search box.

Documents					
ew ▼ New ▼ Organize ▼ Send ▼ More	Actions • De	etails		Select the folder you'd like to Select and enter critera here	🥮 H → 1 of 1 →
Documents		Title *	Туре	Select the inter crite	Instances
ders	în	Auditing	Folder	search and	
Public Folders	i	Data Federation	Folder		
Auditing	<u> </u>	Platform Search Scheduling	Folder		
😳 💴 Data Federation	—	SCSG	Folder		
📁 Platform Search Scheduling	<u> </u>	SCSG Enterprise	Folder		
scsg		SCSG Projects	Folder		
SCSG Enterprise	<u> </u>	Visual Difference	Folder		
H Accounting					
🖲 🔛 Budget					
🖲 🚞 Human Resources					
🗄 🚞 Logistics					
🗄 💴 Publications					
- 📁 SCSG Projects					
🕮 🧰 Visual Difference					

2. You can also search by using the search screen under the **Categories** tab. You can refine your search results by last refreshed, type, and location.

Home Documents		
View New Organize Send More Actions	• D	etails
My Documents		Search Results
Folders		SCSG Enterprise/Accounting/SW Rev Reports
Categories	-	Revenue Comparison All Funds
revenue		SCSG Enterprise/Accounting/SW Rev Reports
Refine Search Results By:	•	Revenue Comparison graphs
Refresh Time		SCSG Enterprise/Accounting/SW Rev Reports
All (45)	1	DSIT Billed Revenue Comparison
Last Year (23) Last 6 Months (15)		SCSG/F030-DSIT/Revenue Reports
Last Quarter (4) Last Month (4)	-	DSIT Cash Revenue Projections
More		SCSG/F030-DSIT/Revenue Reports
type	1 👰	DSIT Revenue by Customer
web intelligence (30) user (10)		SCSG/F030-DSIT/Revenue Reports
crystal reports (4)	-	Revenue Comparison graphs
location	_	SCSG/F030-GS/Fleet
scsg enterprise (18) scsg (16)	-	CVRP Revenue by Customer
users (10)		SCSG/F030-IO/Accounts Receivable Reports/General Services
	-	Lease Revenue by Customer
		SCSG/F030-IO/Accounts Receivable Reports/General Services
	-	Revenue Comparison All Funds
	<	



Enterprise Reports:

There are seven official SCEIS Enterprise reports that can be found within the SCSG Enterprise > Accounting > Financial folder. They are:

- Analysis of Expenditures by Minor Commitment Item (427 Equivalent)
- Appropriation Balances (477 Equivalent)
- AR Aging (Summary)
- Available Cash (404 Equivalent)
- Estimated Rev vs Cash Rec'd (406 Equivalent)
- Summary of Expenditures (424 Equivalent)

The Enterprise Reports will appear as:

SCES * Home Documents								
View New Organize Send More Actions Details								
My Documents		Title A	Туре					
Folders		Accounts Payable	Folder					
😑 🛄 Public Folders		Accounts Receivable	Folder					
Auditing		Dashboard Components	Folder					
🔲 Data Federation		Finance Report Templates	Folder					
		General Ledger	Folder					
[⊕] [□] scsg	-	Grant Peport Templater	Folder					
	-	Official SCEIS FI - Analysis of Expenditures by Minor Commitment Item (427 Equivalent)	Web Intelligence					
SCSG Enterprise	.	Official SCEIS FI - Appropriation Balances (477 Equivalent)	Web Intelligence					
Accounting	-	Official SCEIS FI - AR Aging (Summary)	Web Intelligence					
Colleges and Universities	.	Official SCEIS FI - Available Cash (404 Equivalent)	Web Intelligence					
🗀 Controlling	-	Official SCEIS FI - Estimated Rev vs Cash Rec'd (406 Equivalent)	Web Intelligence					
🗈 🗁 Financial	\	Official SCEIS FI - Summary of Expenditures (424 Equivalent)	Web Intelligence					
SW Rev Reports	-	FI Dashboard (Agency)	B1 workspace					
Year-End Reporting	33	FI Dashboard (Statewide)	BI workspace					
	-	FI Vendor Expenses (Summary)	Web Intelligence					
Budget	33	Grant Monitor	BI workspace					
🛨 💼 Human Resources								
🗄 ·· 📠 Logistics								
🗄 📄 Publications								
🗉 💼 SCSG Projects								
🗄 💼 Visual Difference								



To run an enterprise report:

- 1. Navigate to Public Folders > SCSG Enterprise > Accounting > Financial.
- 2. Right-click on the report and select **View**.



 Enter the criteria for which the report should be run by entering your agency's business area in the From and To Business Area fields and select the binocular icon next to the search box. Select the right arrow make your selection.

Prompts	× 9
Prompts Summary	Business Area From (optional)
Business Area From BUDGET AND CONTROL BC	Refresh Values 😵 🢡 BUDGET AND CONTROL BOARD
 business Area TO * Fiscal Year (Single Value - Required) SC/2012 	LovBusiness AreaBase
Fund From	BUDGET AND CONTROL BOARD FC
✓ Fund To	
✓ G/L Account	
Grant Number (or Range) From Grant Number (or Range) To	
 Posting Period 13 	
	October 13. 2014 1:53:09 PM GMT-04:00 f030
* Required prompts	OK Cancel



<u>Note:</u> Some reports require you to have **Search in Keys** checked next to the search box when you enter a key (such as F030 for Business Area or 10010000 for Fund):

Prompts	* ×
Prompts Summary	🕑 Business Area
 Business Area DEPARTMENT OF PUBLIC SAFET Grant Number Sponsored Program Fund Fund Type Incoming Grant Doc Posting Date 7/1/2012 6/30/2014 	Image: Start Value I
	f030 ⑧ 下 「 背。 Match Case
	→ → → → → → → → → → → → → → → → → → →

4. Enter values for any required fields (For example, Posting Period and Fiscal Year) and any other optional fields. And click **OK** to run the report.

Exporting Reports:

Reports can be exported as CSV, Excel, PDF, or Text files. Once the report has run, click the drop-down arrow next to the Export icon and select Export Document As. (Selecting Export Current Report As will export only the current tab of the report). Then choose the desired format.

Home	Home Documents Official SCEIS FI - Ava 🔎 🌵 🛛											
Web	Web Intelligence 🔹 🗋 😂 🔚 📲 📇 🖓 👘 🐨 🖙 🖙 🍘 🔹 👘 🍘 📲 😵 Track 🔹 🐺 Drill 🕐 🌠 Filter Bar 🏢 Freeze 🐇 🌐 Outline											
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		quivalent)			Text	FY 2015	PP: 13 ()				Run Date: 10/1	13/2014-1:55 PM
(?)	▼ General									Source: Avail	able Cash by Posti	ing Period (with
	Type:	Web Intelligenc										CPST Acts)
	Author:	WIL12490	F030 BUDG	ET AND CONTROL BOARD								
	Creation date:	August 9, 2012								Cash	et Balance Sheet	

<u>Note:</u> You will only see the export option if you're in **View** mode. If you go into the report in **Modify** mode, you'll have to save the file to a location to convert the file into an Excel, PDF, CSV or text file.



1. Select the drop-down arrow next to the Save icon.



 Select the location to save the report. The default location will be your favorites within Business Objects and you can only save the report as a Webi document. Once you choose another location (for example, Desktop), options to save as a PDF, Excel, etc. appear and you can choose to save one or more tabs or all tabs of the report.



3. Click Save.

To save a report to your favorites folder or a shared folder from a public folder:

1. Select the drop-down arrow next to the Save icon and select Save As.





2. Select the folder location and report name and click Save.

Save As				? ×
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Eavorites Folder		Title 🔺	Last Run Time	
🖻 🔛 Favorites Folder	-	Cash Detail 444 J020		
~WebIntelligence		Report of Available Cash. FY and monthly summar		
BD	24	FA to Proj Phase 10012014		
Test	9	GPRVEP Test : 78261		
	1	GPRVEP Test 09242014		
	-	Grant Rev vs Exp J020		
	-	HHS		~
Public Folders	<		>	
File Name: Official SCEIS FI	- Availal	ole Cash (404 Equivalent) CH	×	
Save As Type: Web Intelligence			~	
(w)				
			Save Cance	el

<u>Note:</u> If you select the double arrows under file type, you can add a **Description** to the report and set the **Refresh on open** option:

Save As			② ×
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Favorites Folder	Title 🔺	Last Run Time	
Public Folders	Accounts Payable		~
Public Folders	Accounts Receivable		Ç
	<	2	>
	nalysis of Expenditures by Minor Commitment Item (427	Equivalent)	
Save As Type: Web Intelligence		~	
	-		
Description: Monthly Scheduled	Report		\$
Keywords:			
Assign Category:			
🗄 😁 Corporate Categories			
Refresh on open Permanent regional formating			
		Save Cance	el

To add a simple drop-down filter in View Mode:

1. Select the Filter Bar icon at the top of the page:

🔀 Track 🝷 🐺 Drill 🝷	🌾 Filter Bar	Freeze 🔻 🖷 🖯 Outline



2. Select the Add simple report filter icon and choose the criteria to filter by.



3. Select the value to filter:



Modify (Edit) Mode:

You can only edit reports that you own. To modify a report:

- 1. Right-click on the report you wish to edit.
- 2. Choose Modify.





Note: If you are already in **View** mode (or reading mode), you can switch to **Design** mode by selecting Design at the top, right corner of the report. If you first enter the report in View mode, then go into Design mode, you will be able to make modifications to the report, but won't be able to edit the query. To add objects into the query or make any changes to the query within the query panel, you'll need to right-click on the report name in the document list and select Modify.

	Reading	Ŧ	Design	۳	?
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To Edit a Query:

You can view available fields and add them to your report, add additional queries, and add filters to your report by editing the query in the **Query Panel**. You must be in **Modify mode** in order to edit the query.

- 1. Go into the Data Access tab.
- 2. Click Edit found in the Data Providers tab.

Report	Elements	Formatting	Data Access	Analysis Page Setup
Data Pro	oviders 🧲		Data Obje	ects
💕 Edit	× Purge -	Nefresh	🔹 🔛 New Var	riable 🝷 💋 Merge
[₽] × ✔				

3. This view will appear:





4. You can preview the data for the selected fields in the **Query Panel** by clicking the **Refresh** icon at the top of the **Data Preview** pane. The results should appear as:



5. You can add fields from the available objects pane to the Result Objects panel by selecting the desired field and dragging it into the **Results Objects** panel or by double-clicking the field. You can also remove items from the **Result Objects** panel by selecting the field and pressing Delete on your keyboard or by using the Remove icon.



Note: You can add no more than 50 objects from a query into a report or an error will occur.



Filters

Filters can be applied to the entire report (document) to limit the returned results by using the criteria fields in the prompt box or by placing a filter in the **Query Filters** pane in the **Query Panel**. Filters can also be applied at the report level (tab) or on the tables.

To add a filter to the query in the Query Panel:

<u>Note:</u> When using a BEx query as a data provider, you cannot filter on Keys (*) or Key Figures (*). You can place these filters at the report (tab) level or on the block (table), but not in the **Query Filters** section.

1. Access the **Query Panel** by going to the **Data Access** ribbon and in the **Data Providers** tab, choose **Edit**.



2. Chose the field that you'd like to filter and drag and drop the object into the **Query Filters** pane.

Uuery Panel												3 X
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👋 ▾ Type here to filter tree 🛛 ↔ 🖛	🐴 External Ref - Key	🔆 External Ref - Key 👫 CFDA - Key 🦘 in Grant - Key 🔰 in Grant 👫 Grant - Key 🔰 Grant 🥀 Fiscal year - Key (Not Compounded) 🔰 Lifecycle Status 👫 Grant - Valid-to Date (Key)										
Grant Periodic Revenue vs Expenditure Repor	💋 Posting date 🍂	Fund - Key (Not Com	pounded) 🥖 Sp	onsored Class	🔺 G/L Account -	Key (Not Compo	ounded)	G/L Account	🔺 Cost Cent	ter - Key (Not Compour	ided) 🍂 Functional area - Ke	,
Grant Type	FIDoc number	Revenue Amount	Expenditure A	mount 🗰 En	ding Balance							
🗈 🧯 External Ref		Revenue Anount	Experience		ang bulance							
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Sponsored class Type	Q- Type a text to filter t	he values										
Query 1												4 ▷ 🗉
										Last refresh dat	e: September 24, 2014 9:08:28	M GMT-04:00

3. Once you've selected the field to filter the query, you can choose the operand needed and select the values by choosing from a list of values, typing a constant or adding the filter to the prompt box.

Y Query Filters		
Functional area In list	• =	
	\bullet	Constant
	\odot	Value(s) from list
	\odot	Prompt
	\cap	Object from this query
Data Preview	\bigcirc	Result from another query

To add a filter to a report (tab):

1. Go to the **Analysis** tab at the top of the page.



2. Select the drop-down arrow next to Filter and choose Add Filter.



3. Choose whether you want to apply the filter to the entire tab of the report (called a **Report**) or just the block. Click **Add Filter** and a box will appear for you to choose the object to filter the selected report or block by.

Report Filter		3 ×
Filter Map Pane 🛛 🔍	Report 1	Y Add filter 🍸 🐂
	Report 1 Click Add filter to add a new filter in this area	
	ОК	Cancel Apply



4. Once the object to filter is chosen, you'll see familiar operands and a list of values to choose from.

Filed Map Pane Report 1 Report 1 Image: Contract Contrect Contract Contract Contrect Contract Con	Report Filter		⊘ ×
Vertical Table: Block 1 Type a value: Selected Value(s) © © © In Grant - Key Init I In Grant - Key Init I Posotic Coolito I I I Postic Coolito I I I I Postic Cool	Fiter Map Pane 🛛 🔍	Report 1	🌱 Add filter 🏾 🌱 🔖
In Grant - Key PostEcconto FostEcconto FostEcconto <tr< td=""><td></td><td>👫 In Grant - Key 🛛 Inist 🔹</td><td></td></tr<>		👫 In Grant - Key 🛛 Inist 🔹	
OK Cancel Apply		Ib Grant - Key Image: Constraint of the second	Value(s)

<u>Note:</u> To quickly add a filter to a table, you can right-click in the column of the object that you would like to filter by and choose **Filter** and **Add Filter**.

In Grant - Key		Fiscal year - Key (Not Compound^d)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)
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		Format Cell			



You will then see the filter panel for the block and be given the choice to choose an operand and list of values for the selected column.

Filter Map Pane 🔍	Block 1	
	block i	🌱 Add filter 🏾 🍟 🔯
Renort 1 Vertical Table: Block 1	Ak In Grant - Key In list v	
	Type a value: Image: Control of the second sec	

To remove filters from a report:

1. To remove all filters from a table, select the table by clicking the edges of the table. Place the crosshairs of the mouse over the edge of the table and left-click. The table should appear with darker lines around the edge and should look like:

External Ref - Key	CFDA - Key	In Grant - Key	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G/L Acc Key (No Compo
200200616243	93.068	F0301EC00210	2014	06/30/2014	50550000	610001
200200616243	93.068	F0301EC00210	2014	06/30/2014	50550000	610001



2. You can then delete all filters by right-clicking, selecting **Filter** and then **Remove Filter**. You will be asked if you would like to remove all filters on the block.

External R Key	ef -		DA jey	In Grant - Key	Fiscal yea Key (Not Compoun		Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G K C
20020061	5243	3 93.068		F0301EC00210	2014		06/30/2014	50550000	6
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		E	Align Format	t Table	•				111
	Que	stio		ou sure you wan	t to delete a	II filters Yes	s of Block 1 ?	• ×	

Note: This can also be done by choosing Remove Filter in the Filter tab of the Analysis section.





To remove a filter (but not all filters):

1. Go to the Document Structures and Filters area in the navigational panel and select filter:



2. The \neg icon notes a filter that has been placed on the block or report.



3. Right-click on the filter to delete and choose Remove Filter.



Note: You can also make changes to the filter here by selecting Edit Filter.



Variables:

Variables can be created just as in the previous version of Business Objects by selecting the **Create Variable** icon next to the toolbar.

Report Element Form	nat Data Access Analysis	Page Setup
Table Cell Section	Chart Others	Tools Position Linking
· · · · ·	• 🔰 н • 🕸 • 🥥 •	Turn Into 👻 🛗 Set as Section
« 🗗	²	
	Create Variable	
	Create a new variable using this formula	
pounded)	_	Report 1

1. After you choose the **Create Variable** icon, the **Variable Editor** will appear and you can create a variable using the functions, available objects, and operators listed.

									~		
Create Variabl	e								3 ×		
Variable Defi	nition										
Name:											
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						2	More or	this fur	iction.		
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<u>Note:</u> If you are unsure how to use a particular function or what it does, the description below the functions and the **More on this function** link is very helpful. The link will provide examples of uses for the function and the syntax needed to use it.

Formula							✓ ×
The formula is correct							
Available objects	Functions	Operators	s				
GPRVEP Test : 78261 FI Doc number		+	< <= - 1	。 *	>= ;	> ()
Grant - Key Grant - Key Grant - Key Grant - Valid-to Date (Key)	f.c DayName f.c DayNumberOfMonth f.c DayNumberOfMvek f.c DayNumberOfVeer f.c DaySetween v.c.usen	Values Prompts : After All And					* III
Description							
Returns the number of days between two dat int DaysBetween(first_date;last_date)	tes			?	More or	n this fur	iction.
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<u>Breaks</u>

You can add breaks to any field to add subtotals.

- 1. Select the column that you'd like to add the break.
- 2. Select the **Break** icon within the **Display** tab in the **Analysis** ribbon.

8						
Report Element	Format Data	Access	Analysis Page	Setup		
Filters Data Track	ing	1	Display Cond	litional In	teract Functions	
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inded)	13-2221	93.283	F0301EC01220	F0301EC01220	2013	12/29/2013
	13-2221	93.203	F0301EC01220	F0301EC01220	2013	12/29/2013
	13-2221	93.203	F0301EC01220	F0301EC01220	2014	12/29/2013
	13-2221	93.203	F0301EC01220	F0301EC01220	2014	12/29/2013
	13-2221	93.203	F0301EC01220	FU301EC01220	2014	12/29/2013
	13-2221	93.203	F0301EC01220	FU301EC01220	2014	12/29/2013
	13-2221	93.283	F0301EC01220	FU301EC01220	2014	12/29/2013
	13-2221	93.283	F0301EC01220	FU301EC01220	2014	12/29/2013
	13-2221	93.203	F0301EC01220	FU301EC01220	2014	12/29/2013
	13-2221	93.283	F0301EC01220	FU301EC01220	2014	12/29/2013
d)	13-2221	93.283	F0301EC01220	F0301EC01220	2014	12/29/2013
1)	13-2221	93.283	F0301EC01220	F0301EC01220	2014	12/29/2013



External Ref - Key	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)
NONE	93.048	F0301EC00110	F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000
		F0301EC00110					
External Ref - Key	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded
200200616243	93.068	F0301EC00210	F0301EC00210		2010	06/30/2014	50550000
200200616243	93.068		F0301EC00210		2010	06/30/2014	50550000

3. You can then subtotal your key figures using the Sum function.

Manage Breaks

4. You can also manage your break and change properties such as display first, display all, start on a new page, avoid page breaks in block, etc by selecting the column with the break, selecting the arrow next to the Break icon and choosing Manage.



Add...

Remove

Duplicate values

Avoid page breaks in block Repeat header on every page

OK Cancel Apply

Display first Page Layout Start on a new page ÷



Note: To delete the header row for each break:

1. Select the table by right-clicking on any edge and go to Format Table.

NONE		93.048		FO
NONE	-	93.048		FO
NONE		93.048		FO
		00.010		FO
æ	Cut		Ctrl+X	FO
D	Сору		Ctrl+C	
13	Paste		Ctrl+V	F03
	Paste Special		Ctrl+Alt+V	
х	Delete		Delete	
-	Turn Into		in in ng T <mark>(ey</mark>	Gra
	Assign Data		0210	F03
	Linking		*	F03
3	Publish as Web	Convine		F0:
2002	Publish as web	Service		F0:
7	Filter		•	FO
₽↓	Sort		•	F0:
-	Break		•	F0
	Hide		•	F0:
e.	Order		•	F0:
E	Align		•	
	Format Table			

2. Select the option **Show table headers** in the general tab of the properties box. The first header row will then display duplicate headers.

Format Table		3 X
General Border Appearance Layout	Name Block 1 Display Image: Constraint of the second seco	Show table headers

External Ref - Key	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)	Cost Center - Key (Not Compounded)
	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)	Cost Center - Key (Not Compounded)
NONE	48	F0301EC00110	F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
NONE	93.048		F0301EC00110		2010	11/30/2009	50550000	4280020000	F030EC0000
		F0301EC00110							
External Ref - Key	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)	Grant - Valid-to Date (Key)	Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)	Cost Center Key (Not Compounded
200200616243	93.068	F0301EC00210	F0301EC00210		2010	06/30/2014	50550000	4280020000	F030EC0000
200200616243	93.069		E0301EC00210		2010	06/20/2014	50550000	4280020000	E030EC0000



3. Select the duplicate header row by right-clicking and then choose **Delete** and **Remove Row.**

External Ref - Key	CFDA - Key	In Grant - Key	Grant - Key	Person Responsible	Fiscal year - Key (Not Compounded)
NONE	93.048	F0301EC00110	F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
NONE	93.048		F0301EC00110		2010
		F0301EC00110		_	
200200616243	93.068	F0301EC00210	F0301EC00210		2010
200200616243	93.068		F0301EC00210		2010
					2010

Quick Functions

Quick functions allow you to Sum, Count, Average, find the Min and Max, and Percentage of a column.

Display Conditional	Interact Functions
ntrols ▼ Group ▼ -≣ Break ▼ A↓	Sort ▼ Σ Sum ▼ <i>n</i> Count More ▼
ount]	Min
	Max
	Percentage

- 1. Select the column that you'd like to perform a calculation.
- 2. In the **Analysis** ribbon, go to the **Functions** tab and choose your desired function.

							Reduing	
	reract Functions	tore 🔹						
t - -to (Key)	Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)	Cost Center - Key (Not Compounded)	Functional area - Key	Posting date	FI Doc number	Revenue Amount	E (per A nou
0/2009	50550000	4280020000	F030EC0000	F030_EC00	10/31/09	4000001445	2.33	3
/2009	50550000	4280020000	F030EC0000	F030_EC00	10/31/09	4000002309	2.33	
)/2009)/2009	50550000 50550000	4280020000 4280020000	F030EC0000	F030_EC00 F030_EC00	10/31/09 10/31/09	4000002309 4000002934	2.33	3
				-				3
1/2009 1/2009	50550000	4280020000	F030EC0000	F030_EC00	10/31/09	4000002934	2.33	3 3 3
/2009 /2009 /2009	50550000 50550000	4280020000 4280020000	F030EC0000 F030EC0000	F030_EC00	10/31/09 10/31/09	4000002934 4000004419	2.33	3 3 3 3
/2009	50550000 50550000 50550000	4280020000 4280020000 4280020000	F030EC0000 F030EC0000 F030EC0000	F030_EC00 F030_EC00 F030_EC00	10/31/09 10/31/09 10/31/09	4000002934 4000004419 4000005474	2.33 -2.33 -2.33	3 3 3 3 3 3



Sorting

The sorting option can be found in the **Analysis** ribbon in the **Display** tab.

- 1. Select the column that you'd like to sort.
- 2. Select the arrow next to the **Sort** icon and choose whether to sort by ascending or descending order.

		Ž,	↓ As	scending	_							
		Z,	↓ De	escending								
			Re	emove All Sc	orts							
			A	dvanced								
ey	Person Responsible	Fiscal y Key (Ne Compo	ot	Gra Vali I) Date		Fund - Key (Not Compounded)	G/L Account - Key (Not Compounded)	Cost Center - Key (Not Compounded)	Functional area - Key	Posting date	FI De num	
01110		2010		09/3	80/2012	50550000	1801022000	F030RBB009	F030_RB00	7/1/09	9:10	
01110		2010		09/3	80/2012	50550000	1801022000	F030RBB009	F030_RB00	7/1/09	990	
01110		2010		09/3	80/2012	50550000	1801022000	F030RBB009	F030_RB00	7/1/09	990	
00310		2010		01/3	81/2012	50550000	1801023000	F030RBB009	F030_RB00	7/1/09	990	
00310		2010		01/3	31/2012	50550000	1801023000	F030RBB009	F030_RB00	7/1/09	990	
00310		2010		01/3	81/2012	50550000	1801023000	F030RBB009	F030_RB00	7/1/09	990	
01310		2010		04/3	80/2013	50550000	1801099000	F030RBB009	F030_RB00	7/1/09	990	
01310		2010		04/3	80/2013	50550000	1801099000	F030RBB009	F030_RB00	7/1/09	990	
01310		2010		04/3	80/2013	50550000	1801099000	F030RBB009	F030_RB00	7/1/09	990	
00510		2010		06/3	80/2014	50550000	4280020000	F030EC0000	F030_EC00	10/31/09	990	
00510		2010		06/3	80/2014	50550000	5010580000	F030EC0000	F030_EC00	10/31/09	990	

Formatting

Basic formatting options such as Fonts, Borders, Bold, Underline, Alignment, Cell size, Cell Merge, etc. can be found within the Format Ribbon.

Report Element Format	Page Setup		
Font Border Cell	Style Numbers	Alignment Size Padding	Tools
Arial v 9 v A A	BIUSA - 🖄 - 関	Width: 0.13 cm 📩 Height: 0.4 cm 🛓	🍼 🏘 🍕
	✓ =[Grant - Key]		

Page Setup

Changes to the page size, margins, and orientation can be made in the **Page Setup** section of the toolbar. Also, you can make changes to the Header and Footer properties along with the page display can be made here.

Report Element Format Data Access	Analysis Page Setup				
Report Rename Report Move Report	Page Header Footer	Scale To Page Margins Display			
🗎 Add Report 👔 Duplicate Report 🔖	A ^b Landscape • A4 •	2 cm 🔹 🛄 2 cm 🔹 🛄	2 cm 🔹 🛄 2 cm 🔹		



Charts

Charts can easily be created from tables.

- 1. Once you have the data that you would like displayed within your table, select the table by rightclicking on the outer portion of the table.
- 2. Go to Turn Into and select the type of chart that you need.







3. Changes can then be made to the chart properties by right-clicking on the edge of the chart and choosing **Format Chart**.

	~		
	×	Cut	Ctrl+X
	D	Сору	Ctrl+C
leasures		Paste	Ctrl+V
xpenditure Amount		Paste Special	Ctrl+Alt+V
	x	Delete	Delete
		Turn Into	•
		Assign Data	
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	7	Filter	۲
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	竗	Format Chart	
L	8	Publish as Web Service	

Format chart		? ×
Global General Area Display Measure Properties Data Values Palette and Style Background	Name Block 1 Size Width 19.47 cm 📩 Height 11.27 cm 🛋 Display	A
Border Layout	 Avoid duplicate row aggregation Show measure values with empty dimension values Show dimension values with empty measure values Show measure values when value = 0 Show measure values for which the sum of values = 0 Hide always Hide when Empty Hide when following formula is true: 	II
Title Legend Category Axis Value Axis Plot Area		x fx T
	OK Cancel App	ly



Creating new reports and adding additional queries to existing report

To create a new report:

1. Select the **Web Intelligence** icon on the Homepage.

Home Documents For documentation 🧬 👘	X		
	* My Recently Viewed Documents	* 12 unread messages in My Inbox	 My Applications
	HR Dashboard Cash Detail 444 Gothical SCEIS FI - Estimated Rev vs Cash Rec'd (406 Equivalent) Official SCEIS FI - Detail Transaction Report (403 Equivalent) GRVEP Test ; 72356 Official SCEIS FI - AR Aging (Summary) Official SCEIS FI - AR Aging (Summary) Official SCEIS FI - AR Aging (Summary) Official SCEIS FI - Asponsition Balances (477 Equivalent) Official SCEIS FI - Asponsition Report Official SCEIS FI - Asponsition Report Official SCEIS FI - Vacancy Report Official SCEIS STARS 404 Equivalent - Available Cash March 2012 Official SCEIS STARS 404 Equivalent - Available Cash March 2012	Grant Rev vs Exp Jametta : 113174 GRPVP2 Import : 95405 GPRVP2 Text New : 95404 WOS Oslear of User X Report : 91743 GOS Salary History : 88505 Wisson Salar and User Tax Report : 88371 TO Salary History : 67623 Wisson Salary Analysis-New : 87623 GPVEP Text : 78051 GPVEP Text : 78051	→ →

2. Select the New icon.



3. You will then be given the choice of type of data source. You can choose the Universes that were used in Business Objects 3.1, an Excel spreadsheet, or use a BEx query directly. It is suggested that you use BEx queries rather than Universes.



4. If you choose BEx as your data source, you will see all the available queries within their associated Infoprovider once you expand **CommonConnections.** When you click on an Infoprovider, you will see the available queries.



	 Commitment, Actual, and Budget in 	F Search	(
Connections	Names	Туре	Techname
📮 🧰 CommonConnections	Budget vs Actuals - Carryforward	Query	ZFM_ZPU_C02_Q019
🕞 😥 Business Area	Bus Obj FI Dashboard Expenditure	Query	ZPU_C02_BOB_Q004_EX.
👘 主 🤪 Commitment, Actual, and Budget in Funds Mana	📮 CAFR AAA FM Budget vs Actual	Query	ZFM_ZPU_C02_Q109_C
🗉 🤪 FI AR AGing with GL Splits - ZFIARO14	Copied FM Budget vs Actual Testing	Query	YYFM_ZPU_C02_Q002
표 🤪 FI Line Items in Funds Management - ZPU_032	DNU FM Budget vs Actual	Query	ZFM_ZPU_C02_Q002
🗉 🤪 FITX_Sales Tax Data - ZFITXO03	DO NOT USE FM Budget vs Actual	Query	XFM_ZPU_C02_Q002_J
표 🤪 G_L Cash Reporting - ZCSH_002	FM Budget vs Actual	Query	ZFM_ZPU_C02_Q009
🗉 🤪 GL-AP with Vendor and Payee - ZGLAP_IS1	- 💭 FM Estimated Revenue	Query	ZFM_ZPU_C02_Q020
표 🤪 GM Line Items - ZGM_001	FM Estimated Revenue Prototype	Query	ZFM_ZPU_C02_Q008
🗉 🤪 New G_L (Public Sector Details) - ZGLP_001	FM Estimated Revenues vs Actual	Query	ZFI_ZPU_C02_Q007
표 🤪 One-Time Vendor Payment Data - ZFIAPO02	FMAVCR01 Report	Query	ZFM_ZPU_C02_Q010
Personnel Actions - ZPA_C01A	JWG FM Budget vs Actual	Query	JWG_ZFM_ZPU_C02_Q00
🗉 🤪 Purchase Order Items - ZPUR_001	Jdh pub query	Query	ZFM_ZPU_C02_RE_PRSS
표 🤪 RH039 - Reports DSO - ZPA_039R	PBF_ZPU_C02_Q001	Query	ZPU_C02_Q001
🗉 🤪 Staff and Account Assignments (1018) - ZPAO	🗊 Personal Service Transfer Limits	Query	ZFM_ZPU_C02_Q004
🗉 🤪 Staffing Assignments (Custom) - ZPAOS_C01	RECONCILIATION TESTING	Query	ZFM_ZPU_C02_Q002_RE
🕀 🏭 FM Budget vs Actual	💭 Recon FM Budget vs Actual Jdh	Query	YZFM_ZPU_C02_Q002
	The second secon	Query	YFM_ZPU_C02_Q002_HIE

- 5. Select the query and choose **OK**.
- 6. You will then be prompted to refresh the query and you will see the objects available to include in your report from the query in the **Query Panel**.

Note: When using a BEx query as a data source, you cannot type directly into the prompt field. You'll

need to use the link icon next to the field and choose from a list of values.

	Set Variables [Query 1]					
	Variable	Value(s)				
	Fiscal Year (Single Value - Required)		*			
	Posting Period	16				
	(optional) Business Area					
	(optional) Funds Center					
	(optional) Fund					
	(optional) (optional) Can't type directly into the fields					
	(optional) Grant Number Selection		v			
	Reset	OK				

To add additional Data Sources:

You can add multiple data sources to one Business Objects report within the Query Panel.

1. In the **Query Panel**, go to the drop-down arrow next to **Add Query**.



2. Select the desired data source.

🕕 Query Panel		@ ×			
💕 Add Query •	🛿 😵 🖅 🗅	🕸 Run Query 😴 Close •			
C From Universe	C Result Objects	₹×¥			
From Excel	To include data in the report, select objects in the Data tab and drag them here. Click Run Guery to return the data to the report.				
From BEx					
From Analysis View					
🛞 🦸 Funded Program - Bud					
Suprior Commitment I Funds Center - Bud 4					
E f FM area					
🖲 🥖 Fiscal year					
Fund (High Level) Functional area					
Grant					
Application of funds					
🛞 🧃 Order					
. Ø Workflow status	Cuery Filters	BBT *			
🕀 🥖 Ledger		4-4			
🗈 🥖 Vendor	To filter the query, drag predefined filters here or drag objects here then use the Filter Editor to define custom filters.				
Stat. key figures GAAP Fund Code					
GAAP Fund Code					
GAAP 2 Indicator GAAP Budget Code					
Major Cl					
Budget Act Cl					
E ≠ Exp/Rev Char					
🕑 🦸 Funds Center	Data Preview	@ Refresh			
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E Commt/Actual Detail					
Fund Commitment items					
Original Budget					
Budget Adjustments					
Returns					
	Q+ Type a text to filer the values				
💭 Query 1					
	Last refresh date: (This docum	ent has never been refreshed.)			

Note: You must always include at least one key figure in the Result Objects pane in order for it to run. You do not have to include it in your report, but it must be added to the Result Objects pane. Once you add your data source, you can then add the information into your report.