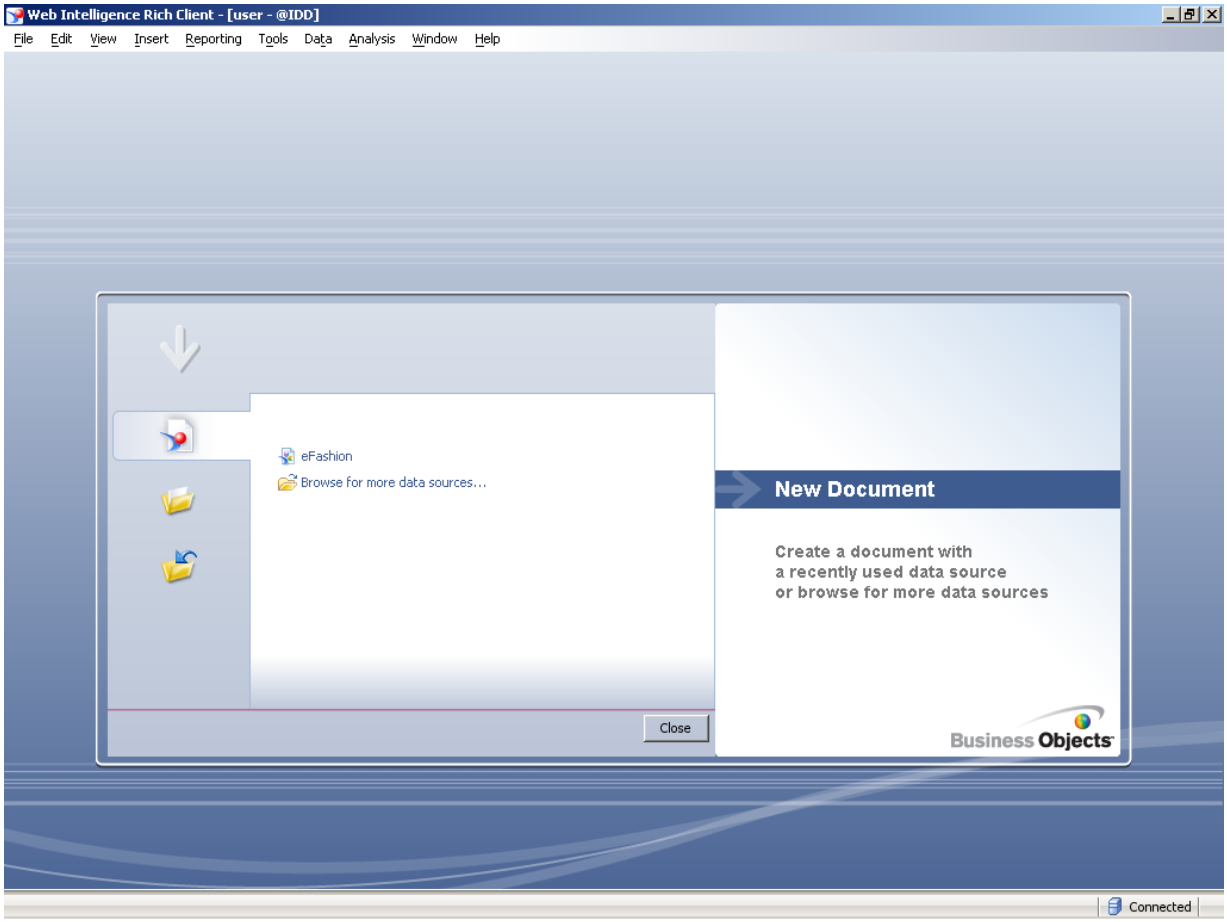
Procedure

1. Start the transaction using the menu path or transaction code.

Web Intelligence Rich Client



2. Click **Create a new document based on a data source** .

In this lesson you will add data from a Microsoft Excel workbook.

You can use similar steps to add data from a personal database such as a Microsoft Access file.

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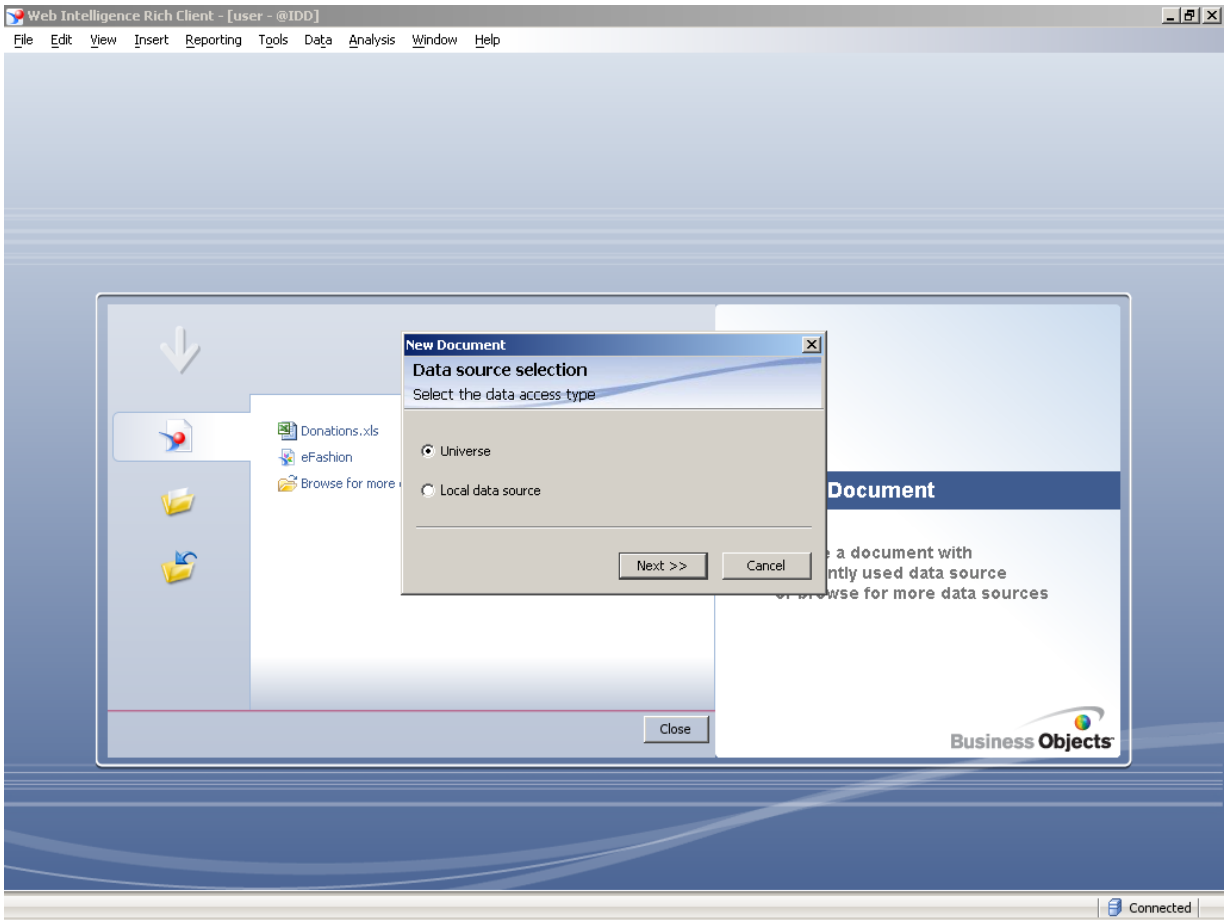
New Document



3. Click **Local data source**.

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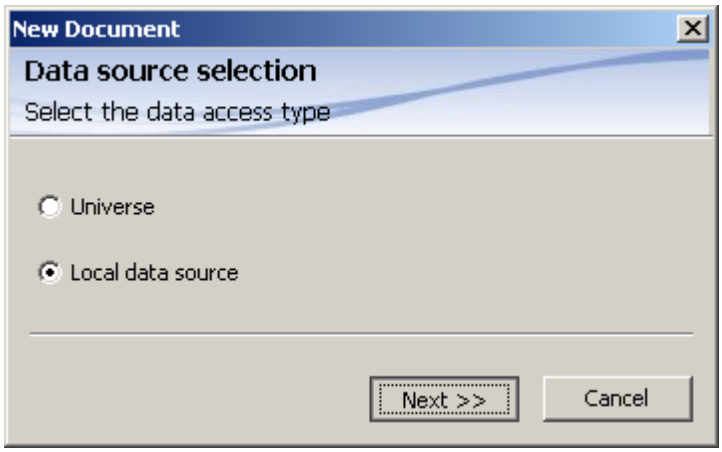
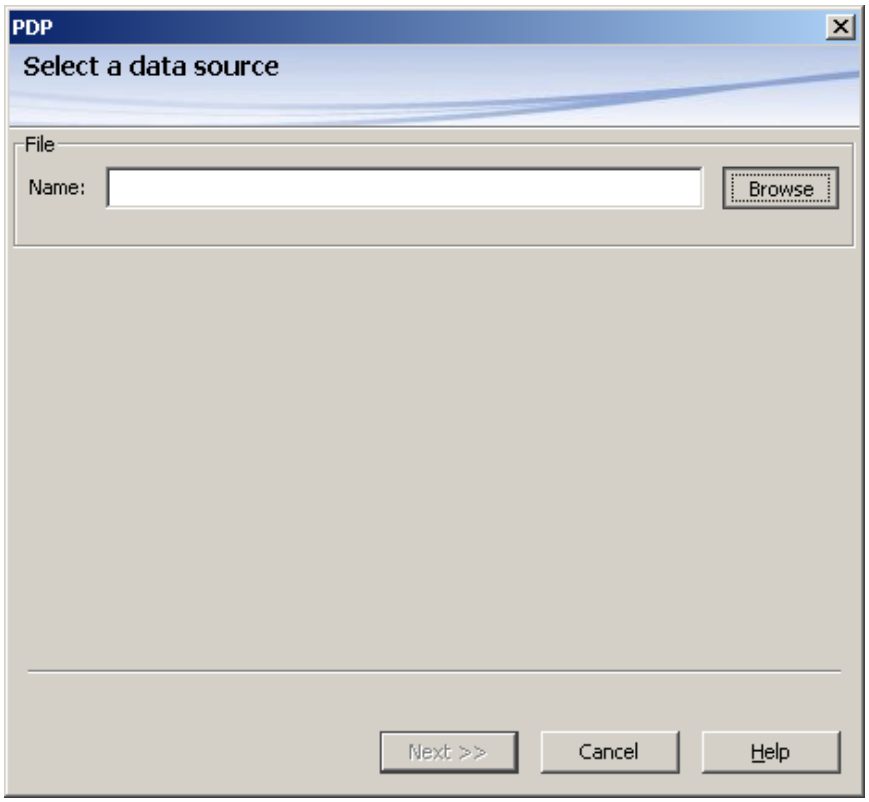
New Document



4. Click **Next >>**.

PDP



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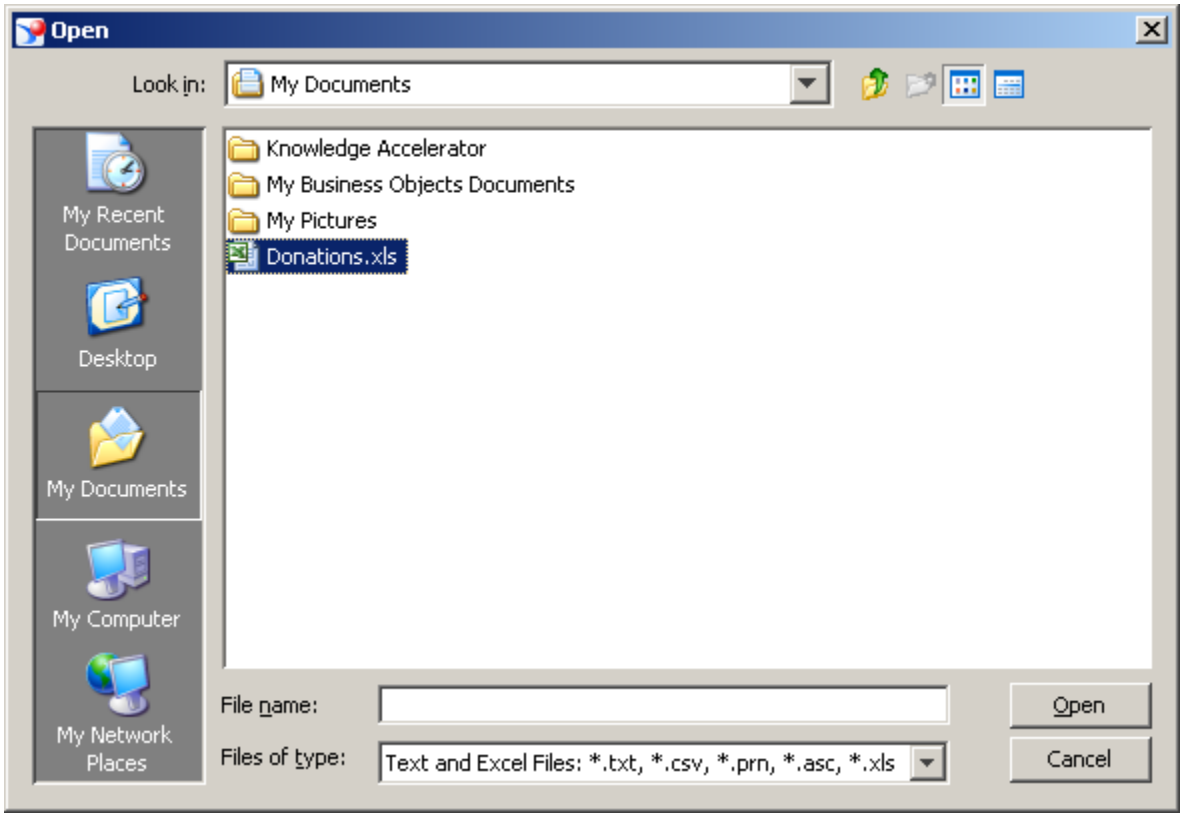
5. Click **Browse**.

Open



6. Click **Donations.xls**.

7. Click **Open**.

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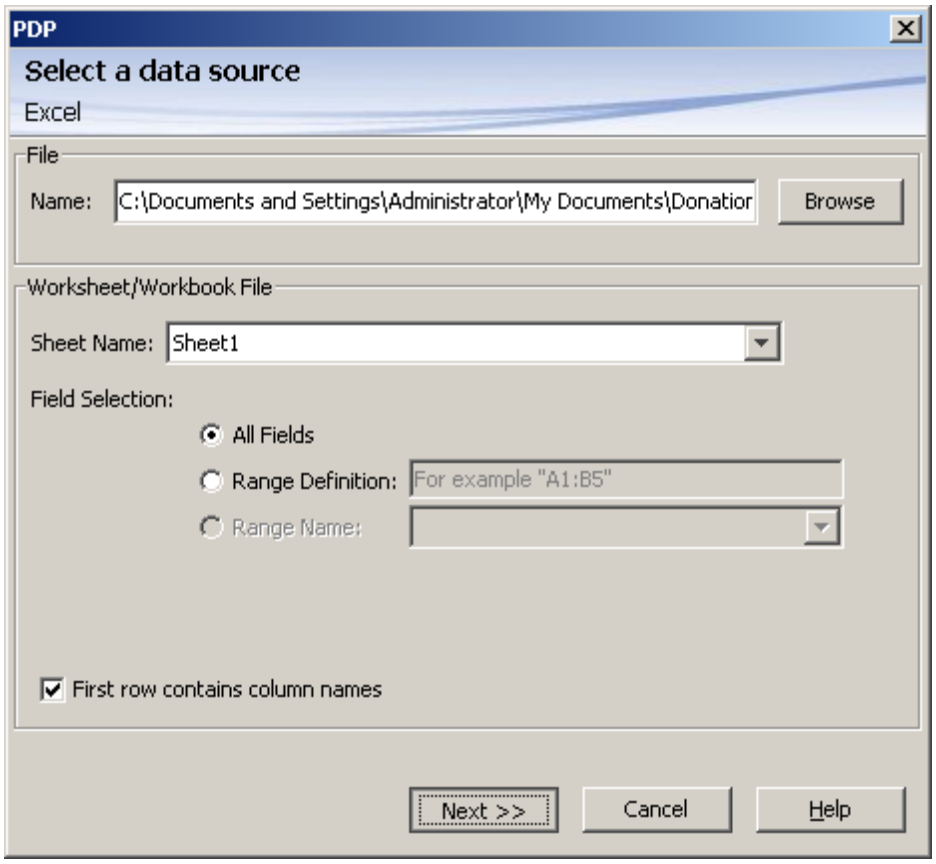
PDP



8. Click **Next >>**.

You can select a specific worksheet or field range which contains the data you want. However, in this exercise you will use the default settings to select all of the data on the first worksheet.

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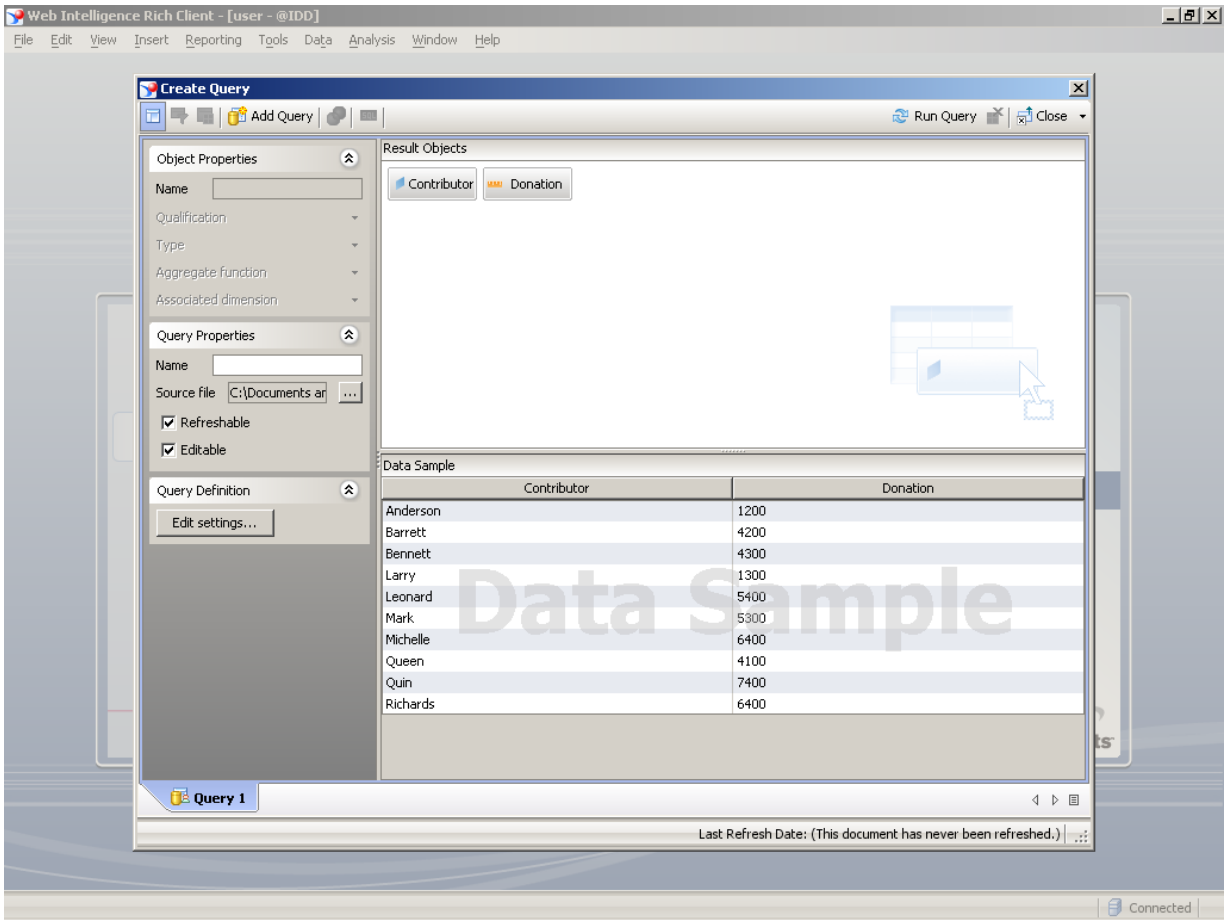
Create Query



9. As required, complete/review the following fields:

Field	R/O/C	Description
	R	**Example:** Charitable Donations

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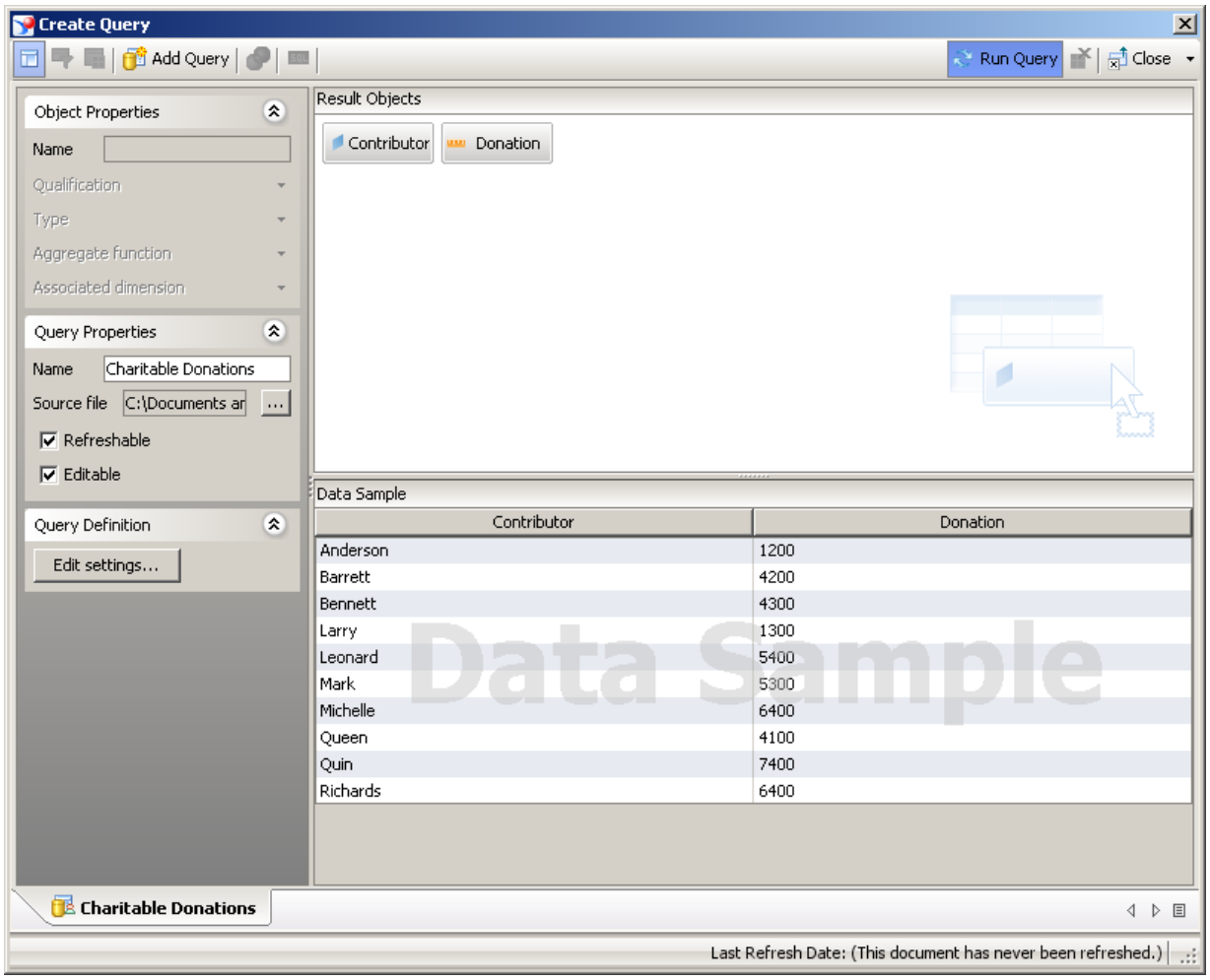
Create Query



10. Click **Run Query**.

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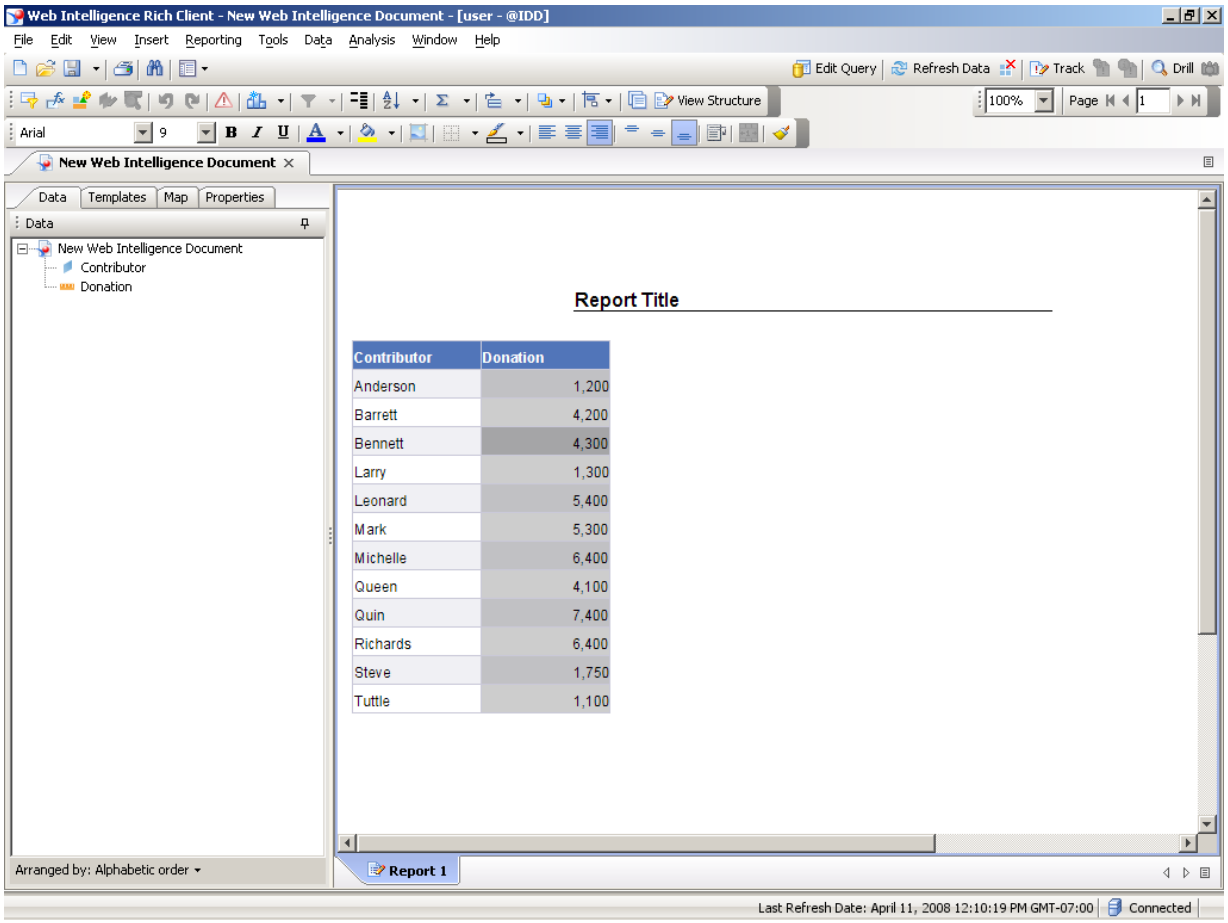

11. Click **an entry in the Donation column**.

The data from the Excel worksheet is displayed.

12. Press [Enter] to continue.

Next you will format the donations as currency.

In the application you would right click an entry in the Donation column.

In this exercise the right mouse button has been pressed for you.

Press **[Enter]** to continue.

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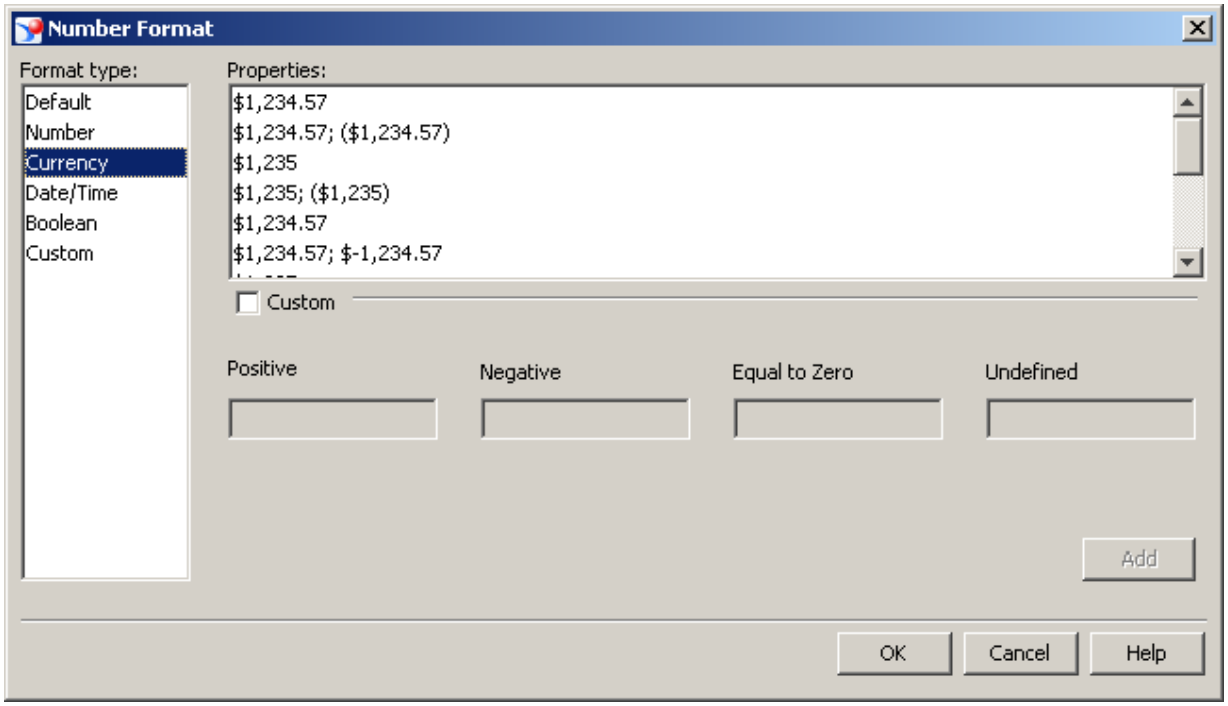
13. Click **Format Number...**.

Number Format



14. Click **Currency**.

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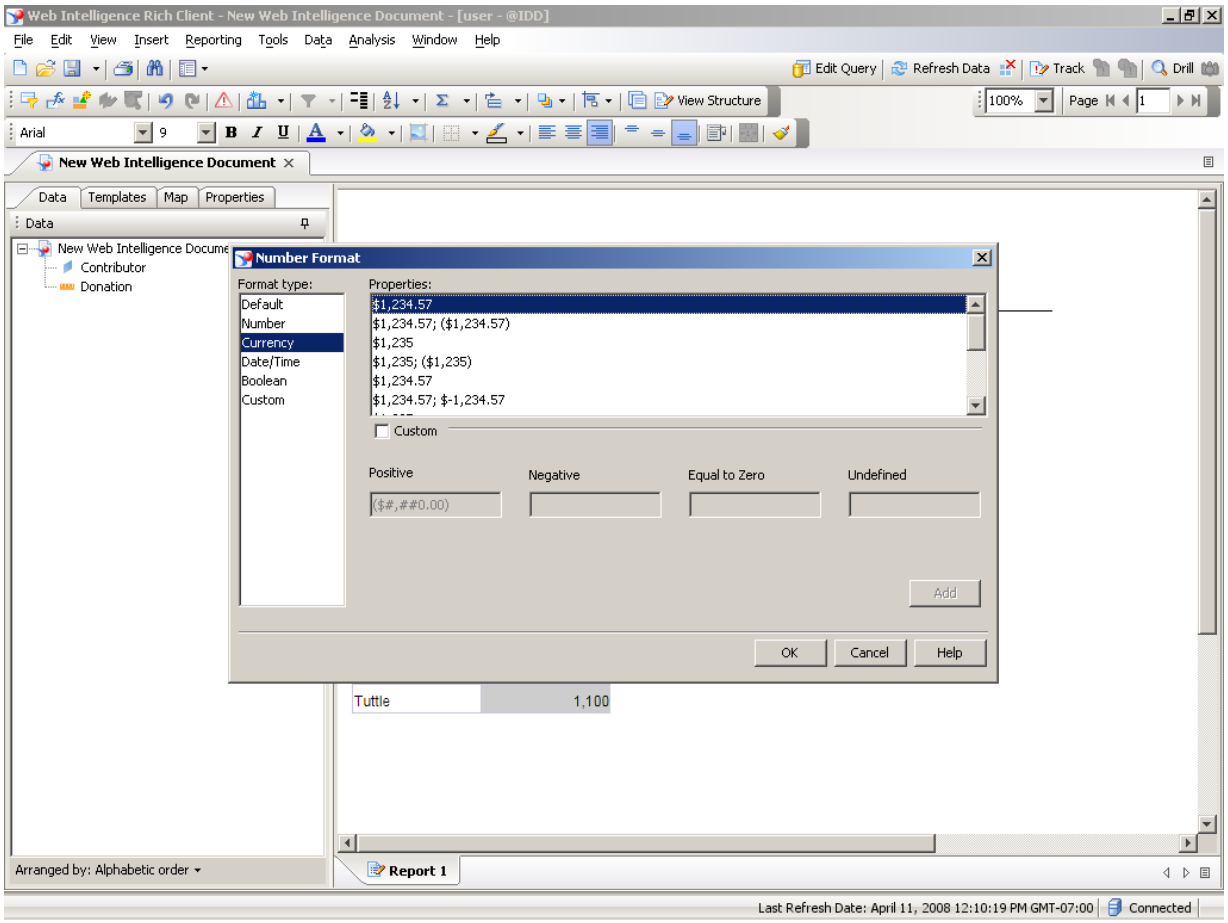
Number Format



15. Click **$1,234.57**.

16. Click **OK**.

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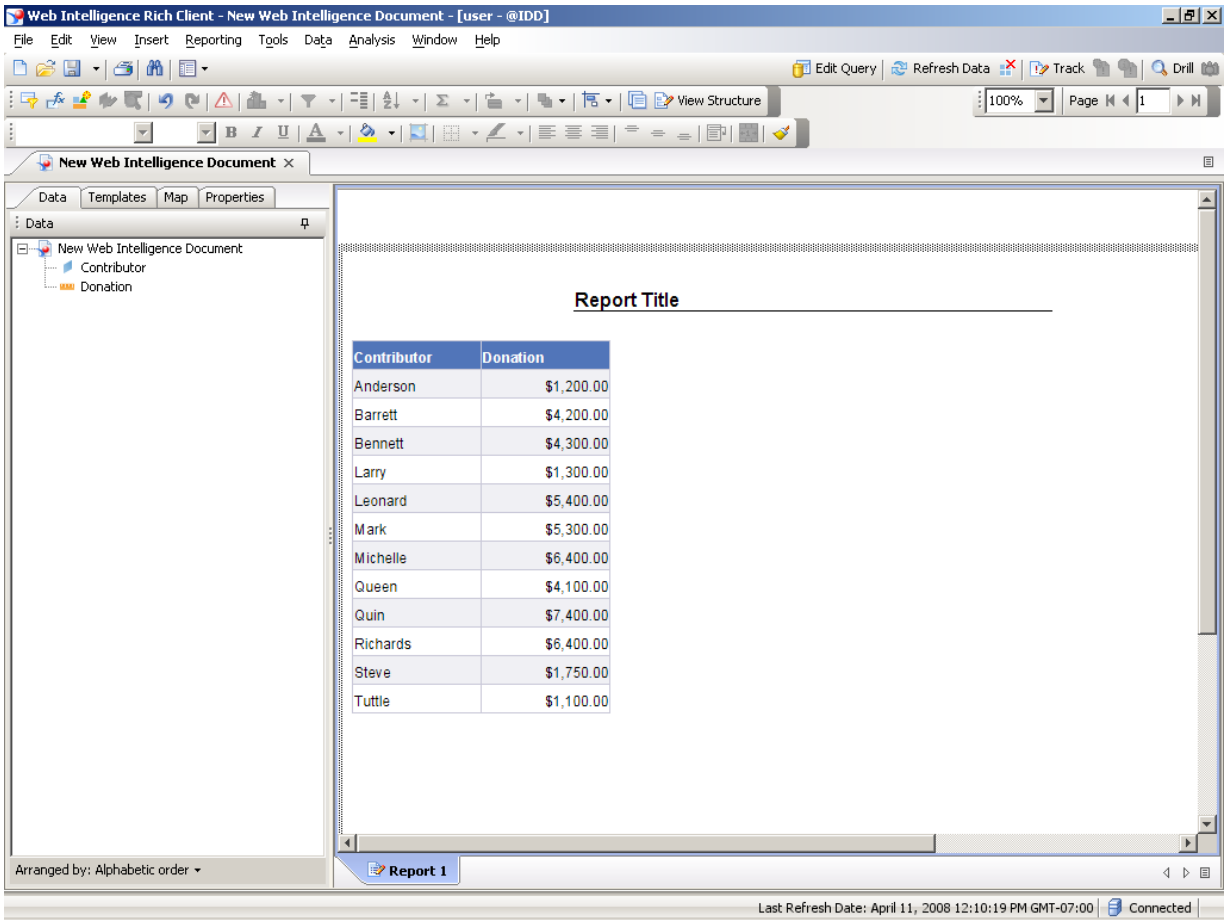
Web Intelligence Rich Client



17. Press **[Enter]** to continue.

The data from the Donations.xls workbook is now displayed and formatted.

Press **[Enter]** to continue.

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