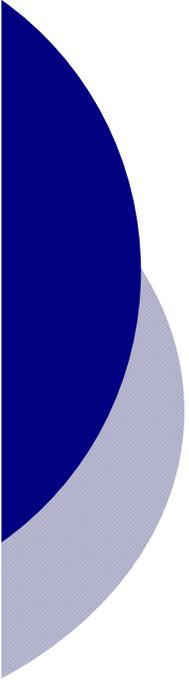




MARS Reporting & Querying

What's New in Business Objects XI 3.1



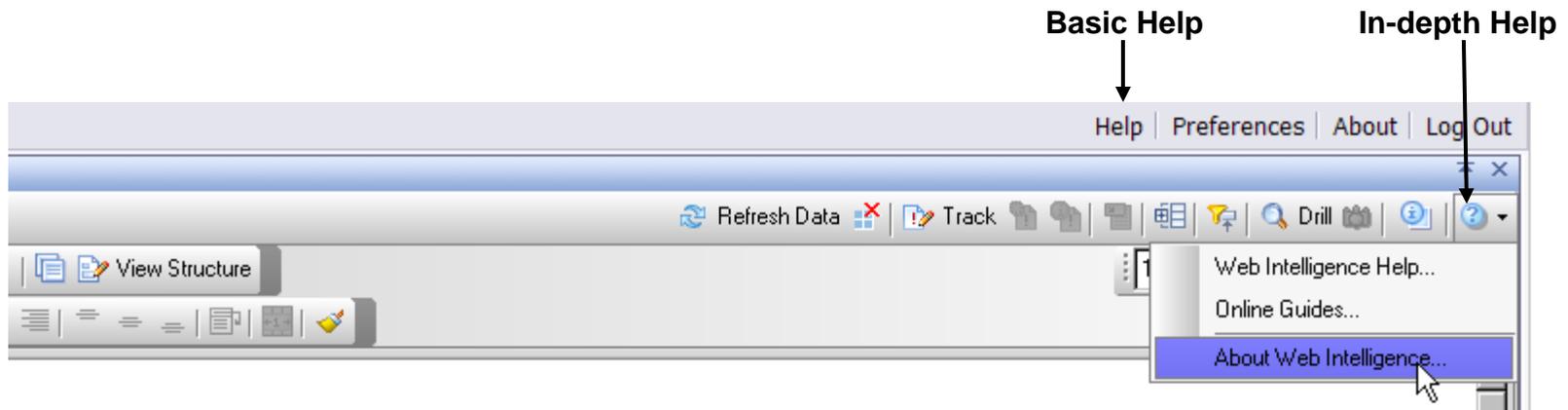


Overview

- This document highlights the changes in functionality and new features of version XI 3.1 of Business Objects.
- MARS released this version in January 2010.
- Intended Audience:
 - This document is for MARS Reporting and Querying Users that have experience using the prior version of Business Objects.
 - Page 1-24 are for Business & Power users.
 - Page 25 and above are for Power Users only.

Getting Additional Help

- Additional help can always be found by using the on-line help.
- Help from the Main Menu covers Setting Preferences, InfoView and basic report building.
- Within *View mode* or *Edit mode* of a document, clicking the help icon will bring you to in-depth documentation on building Web Intelligence documents.



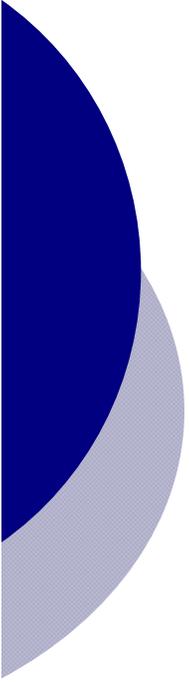
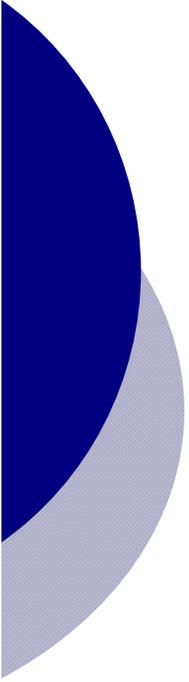


Table of Contents

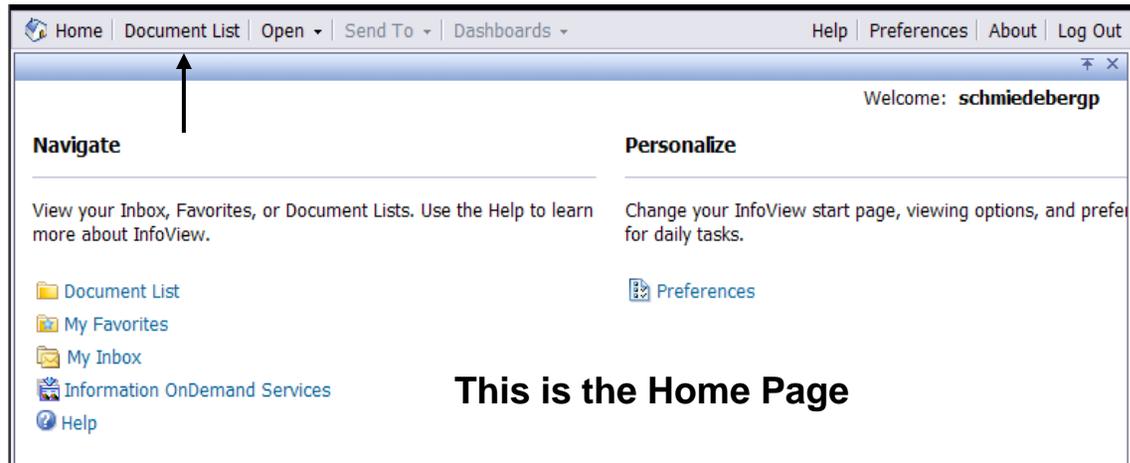
○ Changes in Functionality	
● Setting Preferences	5
● Navigating InfoView	13
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● Creating WebI Documents	25
● Report Formatting	31
○ New Features	
● Optional Prompts	38
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Setting Preferences

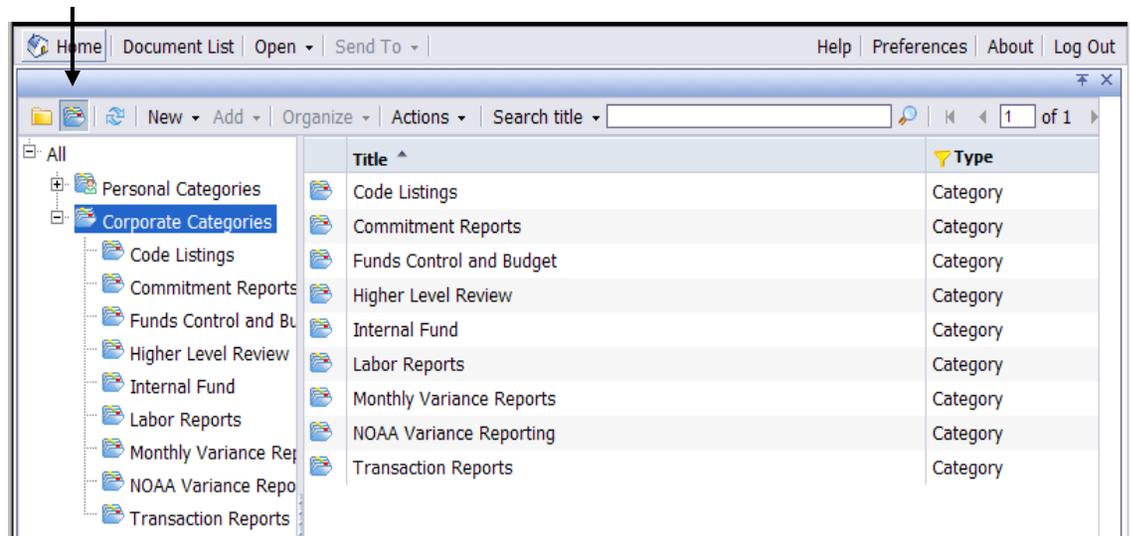
For the MARS R&Q Business & Power User

Setting Preferences: InfoView Start Page



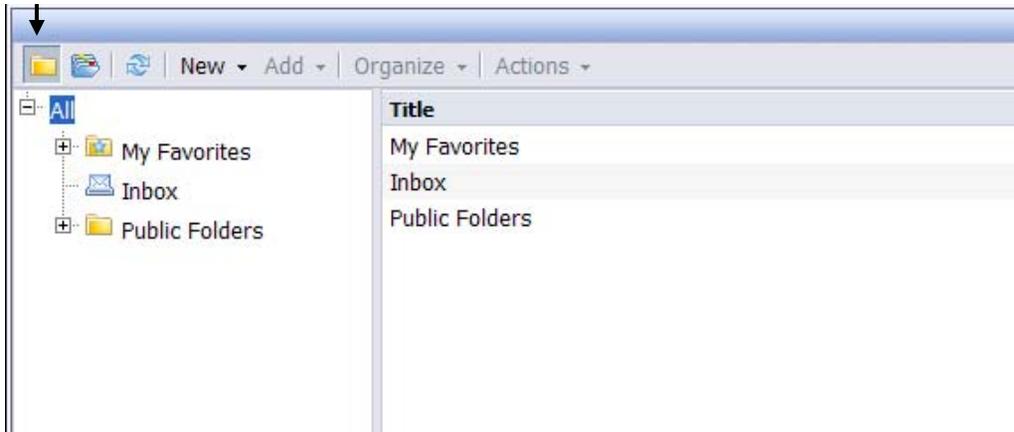
- The first time you login, the *Home Page* will be displayed.

- To see Corporate Documents:
 - Click *Document List*
 - Click *Switch to Categories* button



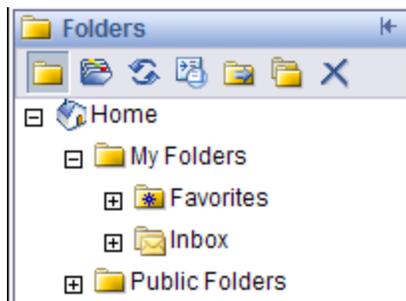
Setting Preferences: InfoView Start Page

New Version

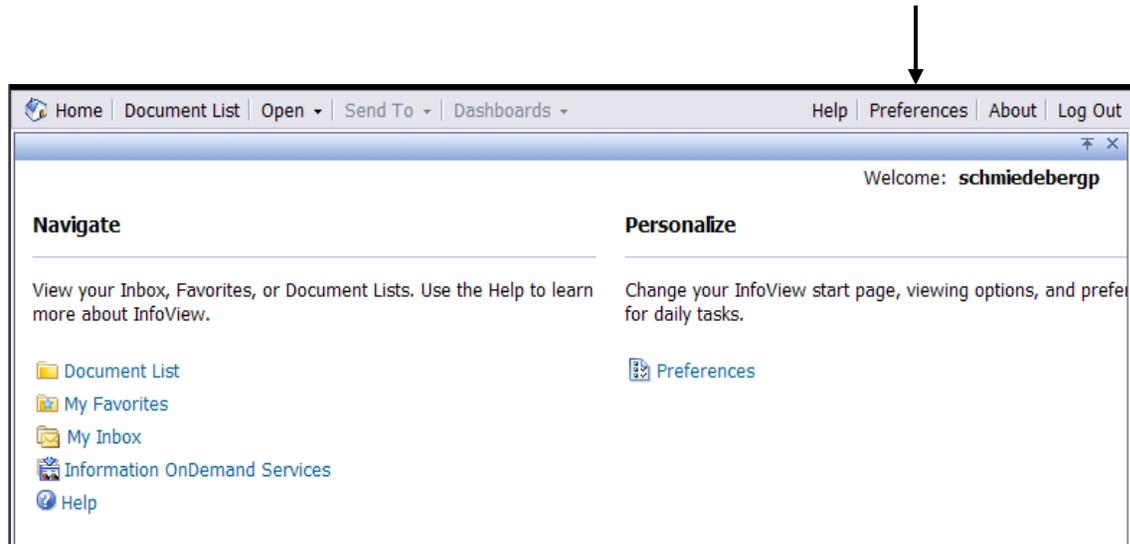


- To see Personal Documents:
 - Click *Document List*
 - Click *Switch to Folders* button
- In the new version My Favorites and Inbox are no longer a sub-folder of My Folders.

Previous Version



Setting Preferences: InfoView Start Page



- Preference settings allow you to change your *InfoView Start Page* if Home is not optimal for you.
- To set preferences, select the *Preferences* option from the menu bar.

Setting Preferences: General Section

Preferences - schmiedebergp

▼ General

InfoView Start Page:

Home

My InfoView

Favorites

Inbox

Folder: (unspecified)

Category: Monthly Variance Reports

Document Navigation View:

Folder

Category

Set the number of objects (max.) per page:

Document List Display:

description

owner

date

instance count

Document Viewing:

In the InfoView portal

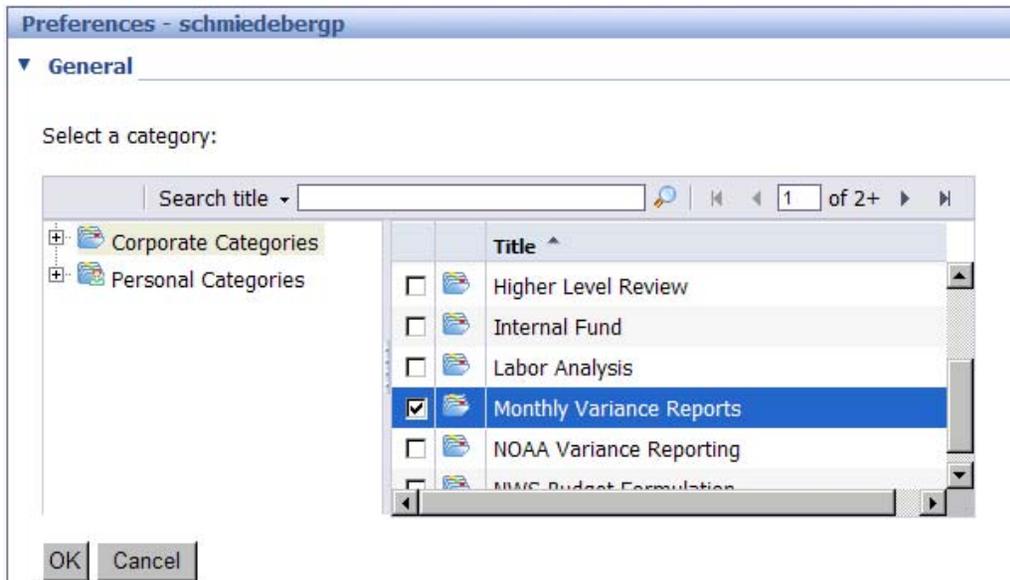
In a single fullscreen browser window, one document at a time

In multiple fullscreen browser windows, one window for each document

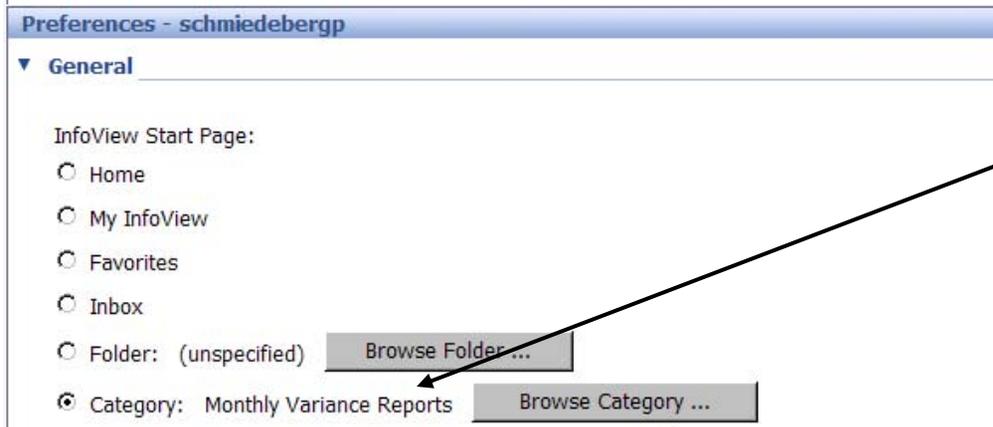
Product Locale:

- Use the following settings if you prefer your InfoView Start Page to be the Category View.
- InfoView Start Page:
 - Category*
- Document Navigation View:
 - Category*
- Additional recommendations:
 - Set the number of objects (max.) per page to *100*.
 - Uncheck everything under *Document List Display* if you prefer a simple list of documents.
- Click *Browse Category* if you would like to see a particular category on your InfoView Start Page . . .

Setting Preferences: General Section



- Scroll through the list of categories and check your preferred category.
- Click **OK** to return to the preference option list.



- Note the selected category.

Setting Preferences: Web Intelligence Section

Preferences - schmiedeberg

▼ Web Intelligence

Select a default view format:

- Web (no downloading required)
- Interactive (no downloading required)
- PDF (Adobe AcrobatReader required)

When viewing a document:

- Use the document locale to format the data
- Use my preferred viewing locale to format the data

Select a default creation/editing tool:

- Advanced (Java 2 required)
- Interactive (no downloading required)
- Desktop (Web Intelligence Rich Client required)
- Web Accessibility (508 Compliant)

Select a default Universe:

No default universe

Drill options:

- Prompt when drill requires additional data
- Synchronize drill on report blocks
- Hide Drill toolbar on startup

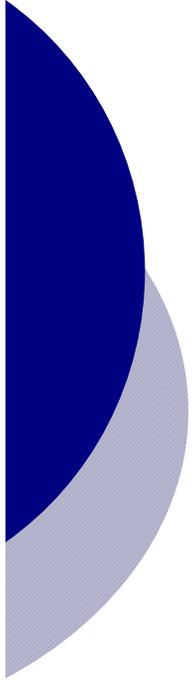
Start drill session:

- On duplicate report
- On existing report

Select a priority for saving to MS Excel:

- Prioritize the formatting of the documents
- Prioritize easy data processing in Excel

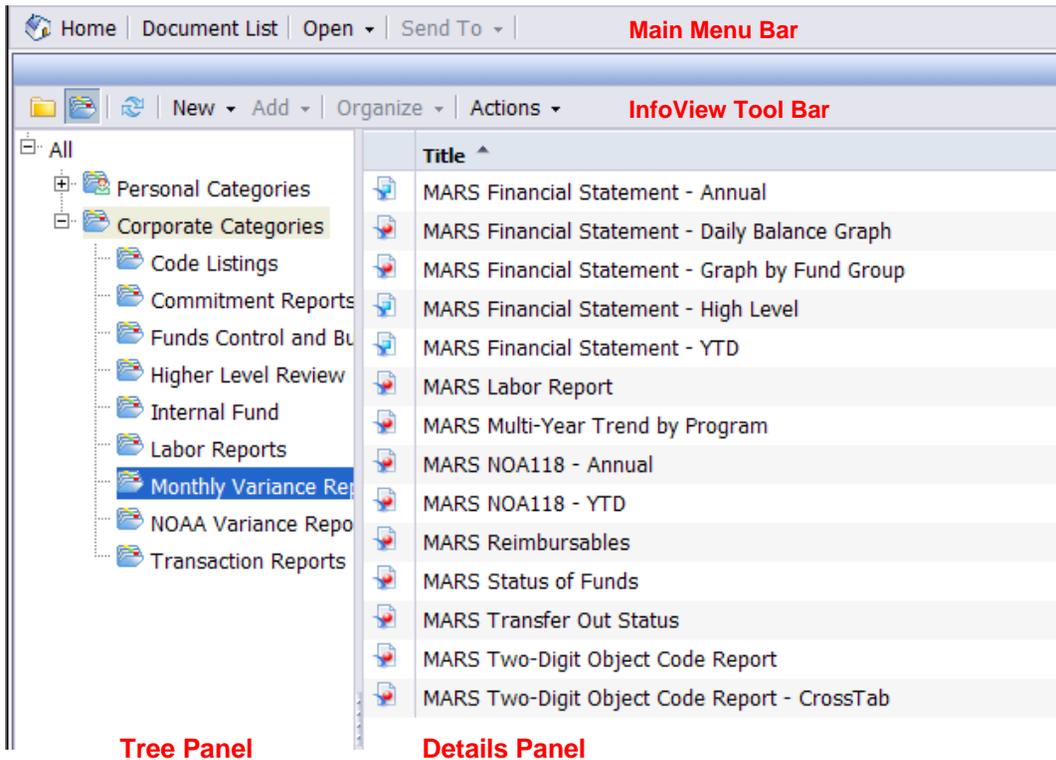
- Scroll down to the **Web Intelligence** section. Click the ► icon next to the section name to expand the list of options within the section.
- The MARS Team recommends the following Web Intelligence settings . . .
- Select a default view format:
 - Web**
- When viewing a document:
 - Use my preferred viewing locale to format the data**
- Select a default creation/editing tool:
 - Advanced**
- Select a default Universe:
 - No default universe**
- Drill options:
 - Prompt when drill requires additional data**
 - Synchronize drill on report blocks**
- Start drill session:
 - On existing report**
- Select a priority for saving to MS Excel:
 - Prioritize easy data processing in Excel**
- **Click OK** to save settings.



InfoView Navigation

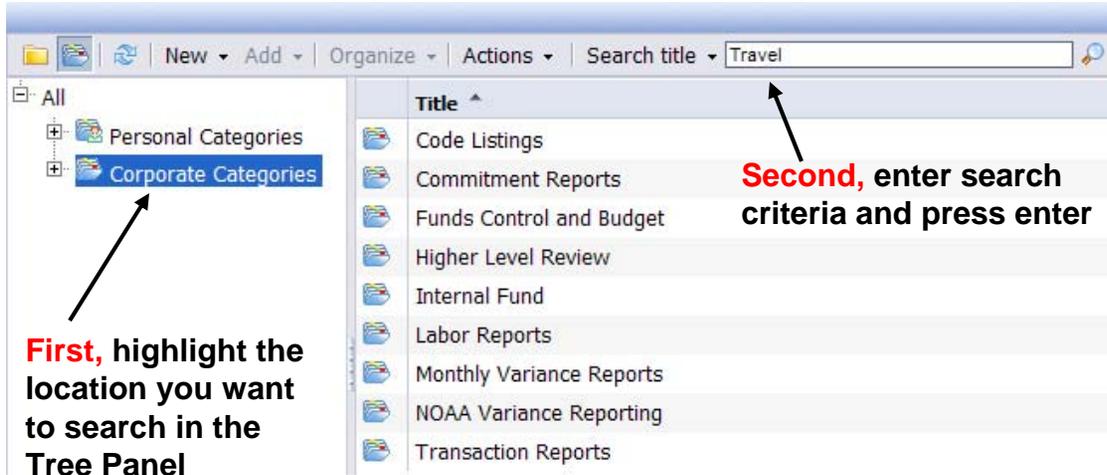
For the MARS R&Q Business & Power User

InfoView Navigation: Panels and Menu Bars

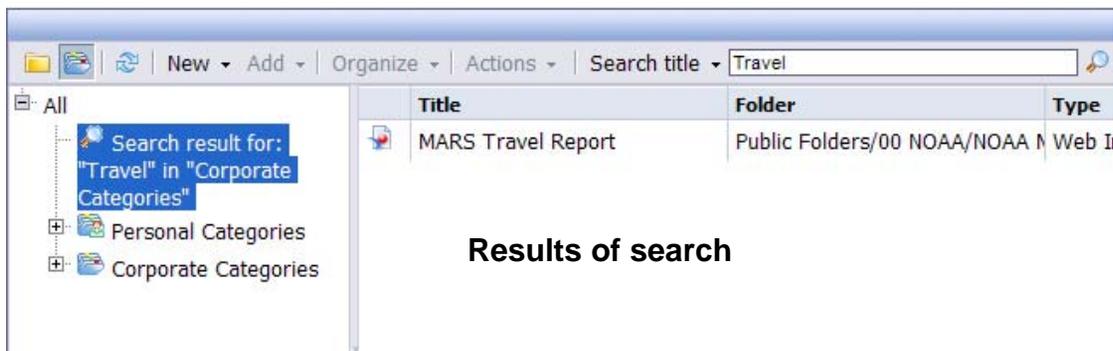


- Click the *Home* icon to return to the home screen specified in your preferences.
- Note that the screen is divided into two panels:
 - Tree Panel
 - Details Panel
- The *Tree Panel* is used to browse personal folders & categories, Inbox documents and corporate categories.
- The *Details Panel* is where the objects within the selected folder or category are displayed.
- The *InfoView Tool Bar* is only available when the Tree and Details panel are displayed.
- The *Main Menu Bar* on top is always displayed.

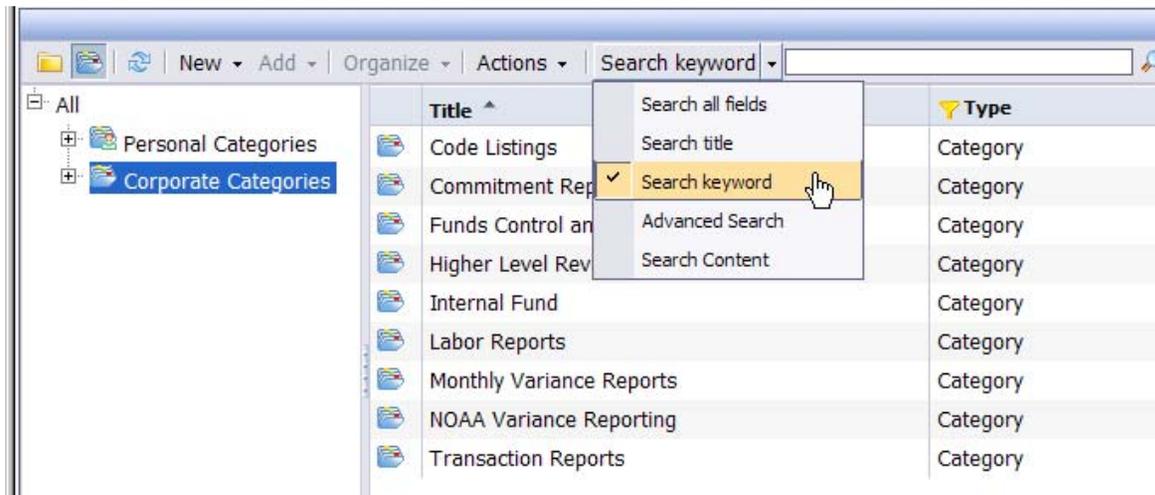
InfoView Navigation: Finding Documents by Name



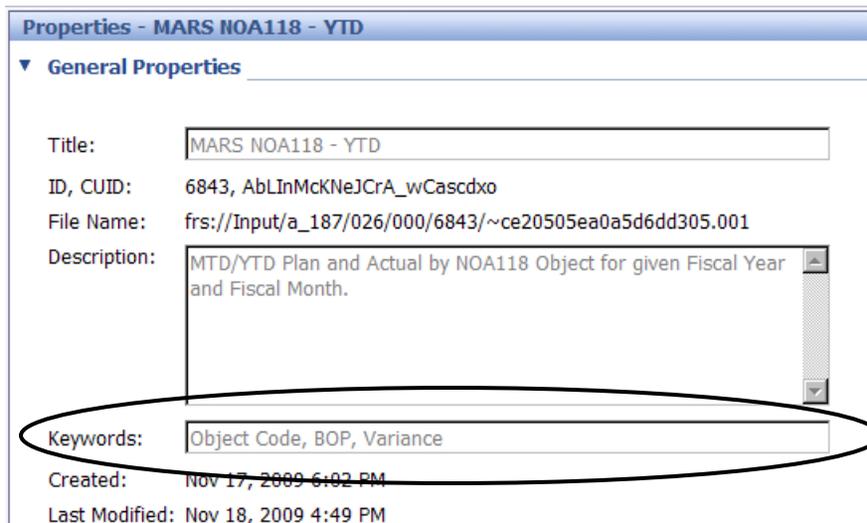
- Searching for a document has changed slightly.
- The search facility will only search the selected folder or category.
- Be sure to first highlight the folder or category you would like to search in the Tree Panel.

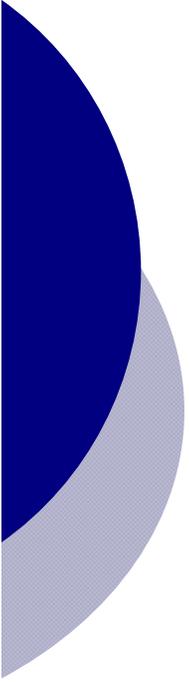


InfoView Navigation: Finding Documents by Keyword



- Another way to search is by keyword.
- The MARS team has updated document keywords as part of this new release.

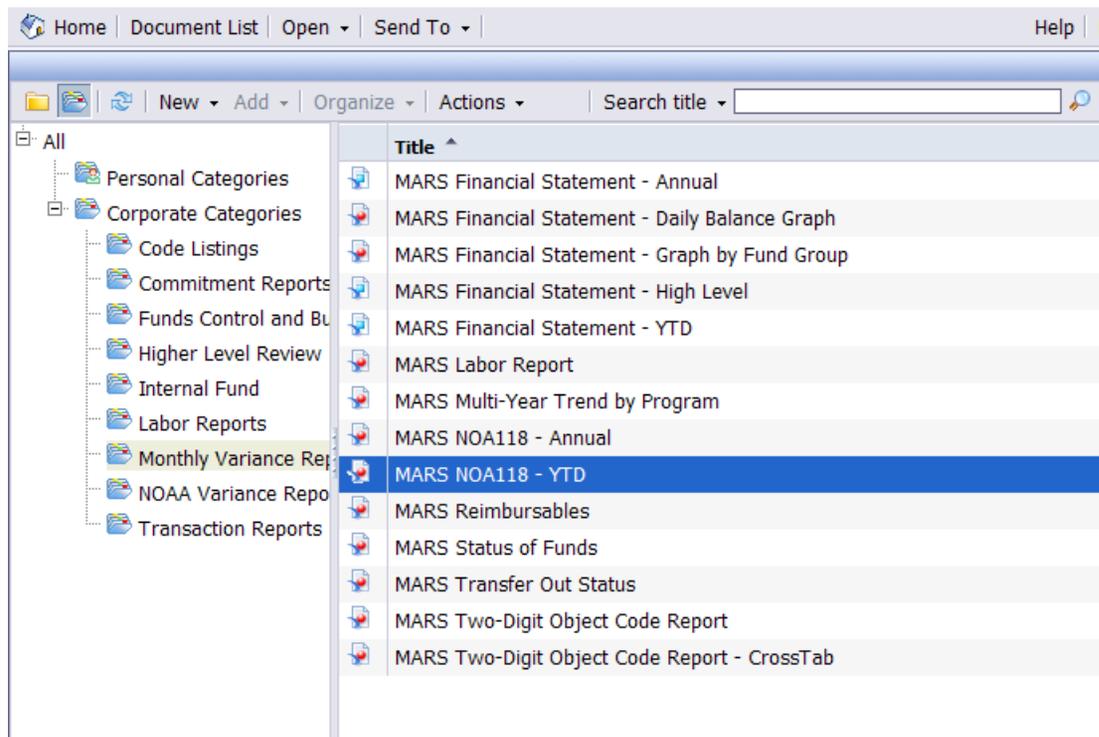




Working with Documents

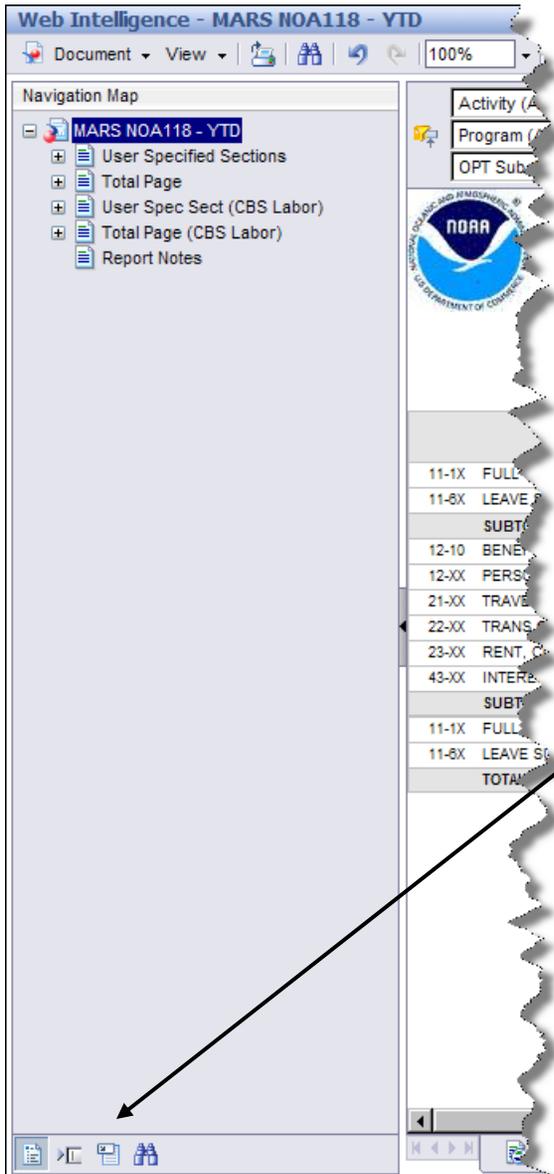
For the MARS R&Q Business & Power User

Working with Documents: Using a Corporate Document



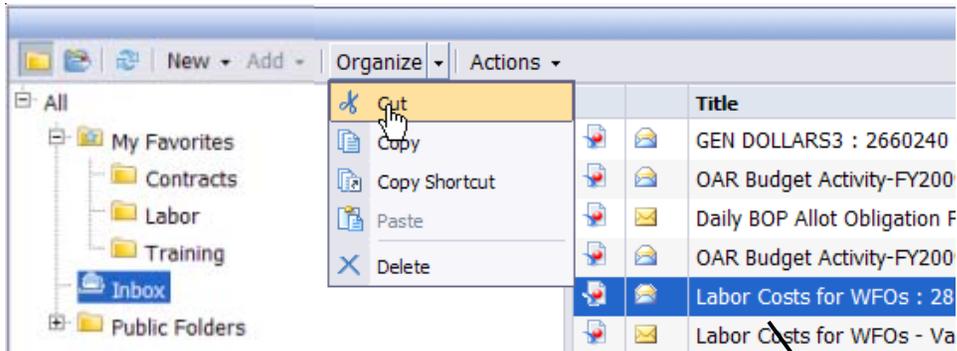
- To view a document, you must *double click* on the document name in the *Details Panel*.
- In the previous release the document would open with a single click.

Working with Documents: Navigating Within a Document



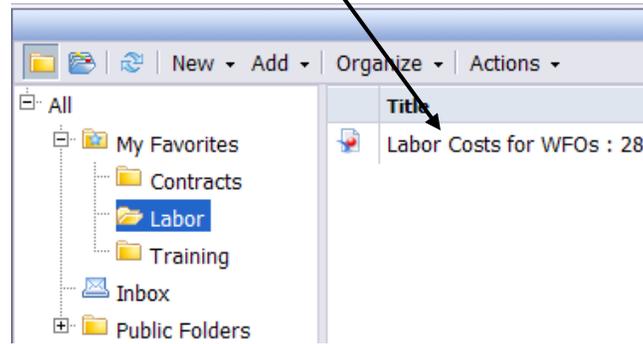
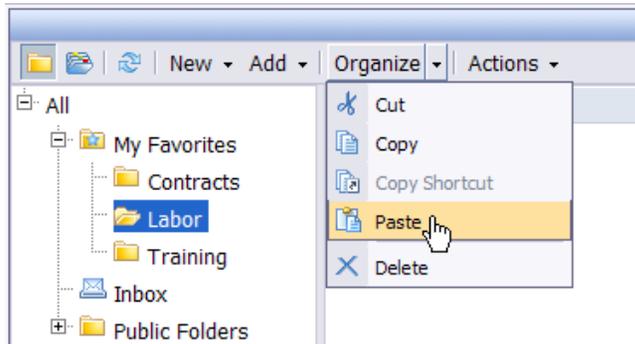
- There will be a panel to the left of the report. This panel is used to show the following features:
 - User Prompt Input
 - Navigation Map
 - Input Controls (new feature)
 - Find
- The icons at the bottom of the left panel control which feature you see.
- The last feature you used will show as default.
- The Navigation Map is displayed here.

Working with Documents: Organize Menu



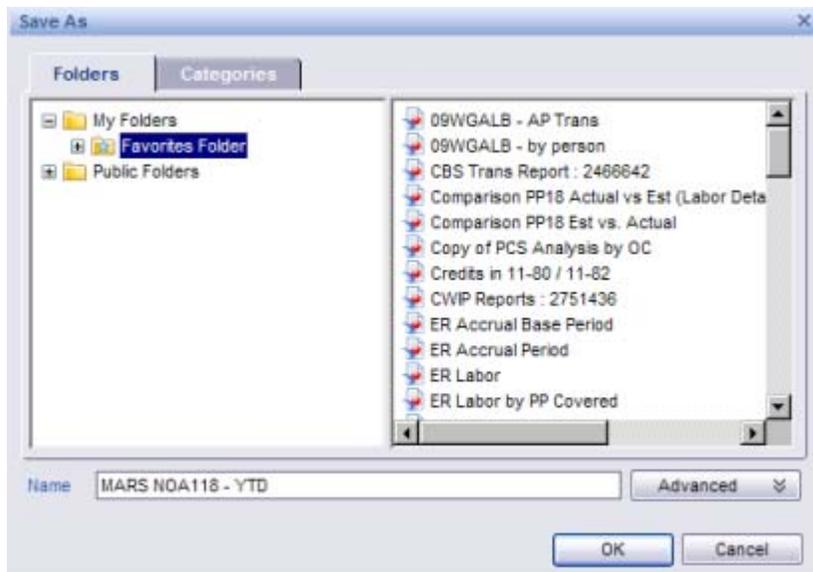
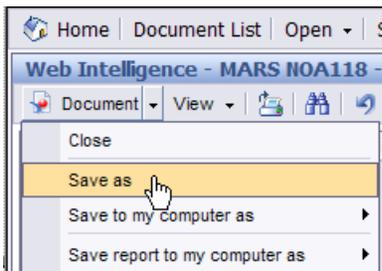
This document has been cut from inbox and pasted in Labor folder

- The Organize menu has been redesigned. Now you will use the Cut, Copy, Paste and Delete functions much like you would in Windows Explorer.
- For example, to move a document, **highlight the document** you would like to move.
- From the **Organize Menu**, select **Cut**.
- **Highlight the Personal Folder** where you would like to place the document.
- From the **Organize Menu**, select **Paste**.



Working with Documents: Adding a Corp Doc to Personal Folder

- You cannot use Copy / Paste to copy a Corporate Document to a Personal Folder.
- Instead you must first view the Corporate Document, and then use the **Save As** option from the **Document menu**.
- You must **uncheck the Corporate Category** before saving, or you will get an error message and have to cancel out of the window and try to save again.



Working with Documents: Sending Documents to Other Users

The screenshot shows the 'Send To' menu with 'Business Objects Inbox' highlighted. Below it, the 'Send' dialog box is open, showing document details and recipient selection options.

Title: Labor Costs for WFOs : 2815759
Description:
Created: Nov 19, 2009 3:21 PM
Last Modified: Dec 7, 2009 11:06 AM
Last Run: Never
Destination: Business Objects Inbox

Use default settings ← **UNCHECK this option**

Available

Title	Full Name
hillb	Beth A Hill
hilld	R. Derek Hill
hille	Eric Hill
hilln	Nicolle Hill
hillr	Randy Hill

Selected

Title	Full Name
hilld	R. Derek Hill

Target Name:
 Use Automatically Generated Name
 Use Specific Name Add placeholder... ▾

Send As:
 Shortcut
 Copy ←

Submit Cancel

- To send a document to another user:
 - Highlight or view the document you wish to send
 - From the **Send To Menu**, select **Business Objects Inbox**
- In the Send screen:
 - **Uncheck 'Use default settings'**
 - Enter all or part of the recipients last name in the search title box and click the search icon
 - Highlight the recipients name
 - Click the > button to add the name to the Selected list
 - Click **Submit**
- Note that **Send As Copy** is now the default.

Working with Documents: Creating a Corporate Document Shortcut

Title: MARS NOA118 - Annual ← **Corporate Document**

Description: Annual Approp, Annual BOP, YTD Actual, Remaining Commitment and Balance by NOA118 Object Code and Organization through given Fiscal Year and Fiscal Month. Labor and Non-Labor subtotals on some report tabs. Summarized to the Direct/Reimb, Fund Group, Fund, Program, Project or Task level for any level of the organization code.

Created: Nov 17, 2009 6:02 PM

Last Modified: Dec 31, 2009 2:24 PM

Last Run: Never

Destination: Business Objects Inbox

Use default settings

Available

Search title: schmie

Search result for: "schmie" in "User List"

Title	Full Name
schmiedebergp	Penny Schmiedeberg

Selected

Title	Full Name
schmiedebergp	Penny Schmiedeberg

Send to yourself

Target Name:

Use Automatically Generated Name

Use Specific Name Add placeholder...

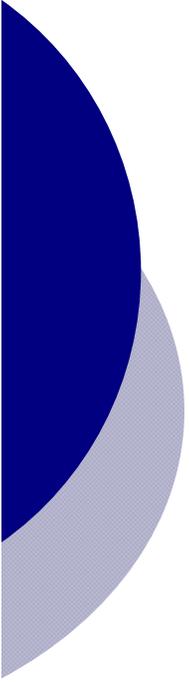
Send As:

Shortcut ← **Send as shortcut**

Copy

Submit Cancel

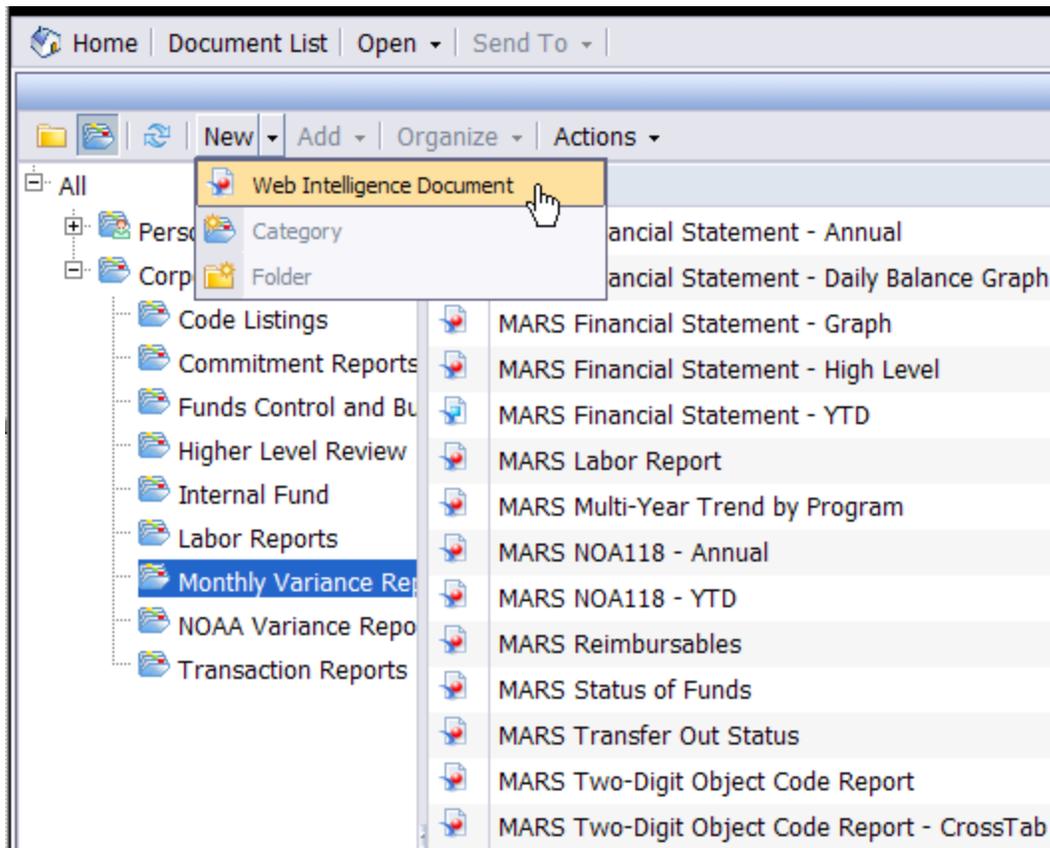
- In the new release you can no longer add a document as a shortcut directly into your personal folders.
- You must first send the Corporate Document to your Inbox as a shortcut, then save the shortcut to your personal folders.
- Use the Organize menu to cut and paste the shortcut to your personal folder.
- Saving Shortcuts of Corporate Document rather than a copy ensures that you are always referring to the latest version of the Corporate Document.



Creating WebI Documents

For the MARS R&Q Power User Only

Creating Web Documents



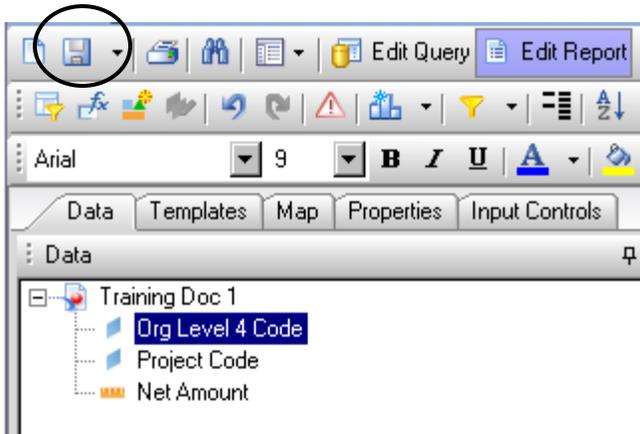
- Click *Home* or *Document List* so that the InfoView Menu Bar is displayed.
- From the *New Menu* select *Web Intelligence Document*.

Creating WebI Documents: Universes

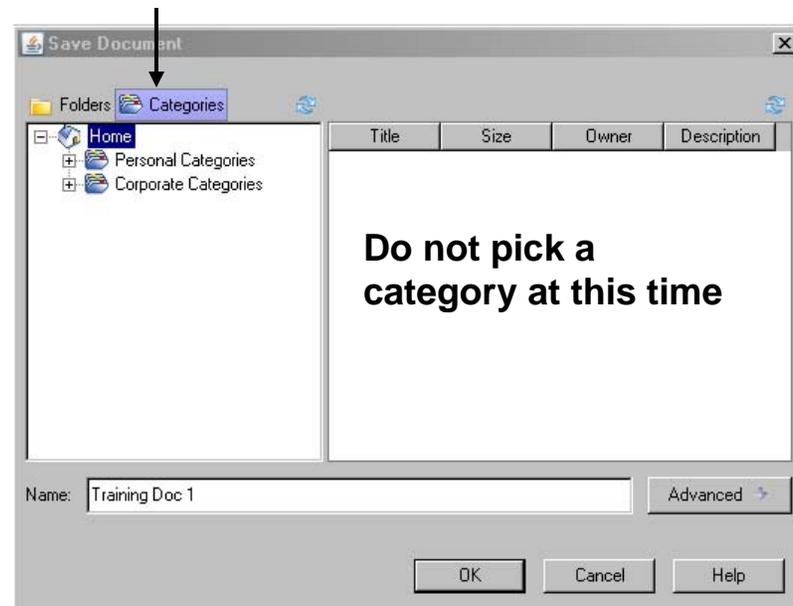
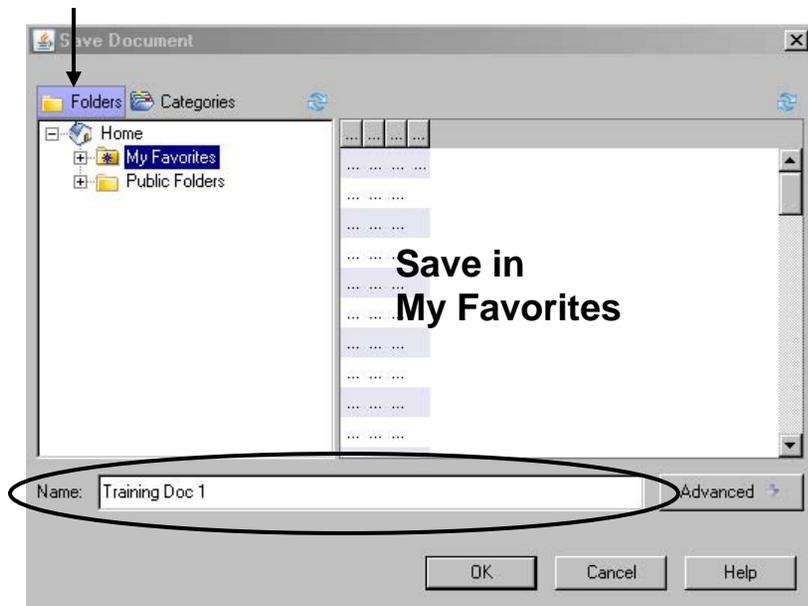
Web Intelligence Document - New Document		
Universe ^	Description	
MARS Allotment Detail (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS Allotment tables. Allotment	
MARS Allow Advice (MARS)	This universe accesses the MARS R&Q nightly copy of the Allowance Advice table	
MARS AP Trans (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS AP Trans table. AP Trans document and reference numbers, trans dates, ACCS, non-private employee and	←
MARS BOP Detail (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS BOP tables. NDW_BOP	
MARS Budget Detail (MARS)	This universe accesses the MARS R&Q nightly copy the Budget table from MARS	
MARS Codes Listings	This universe accesses the variance master file information for all systems with Object Codes, Organizations, OPT Groups, Pay Periods, etc.	
MARS Commitment Detail (MARS)	This universe accesses the R&Q nightly copy of the Commitment Detail tables from	
MARS Commitments & Projections (MARS)	This universe accesses the MARS R&Q nightly copy of the Static Data from MARS	
MARS Credit Card Trans (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS Credit Card Transa	
MARS GL Acct Summary (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS GL Summary Tab. 20,1720,1832,4222,4252,4800 thru 4999,5700-89,6100. NDW_GL_ACCT_SUMMA	
MARS PPBES Reporting (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS PPBES tables. NDW_PPBES_SUMMARY, NDW_RPM_GOAL_CODES_MV	
MARS Stored Accounting (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS Stored Accountin NDW_CARD_HOLD_ACCT_V, NDW_GSA_TAG_V, NDW_RECURRE_V	
MARS Travel Authorization (CBS)	This universe accesses the MARS R&Q nightly copy of the CBS Travel Authorizat	
MARS Variance Reporting	This universe accesses a combine table of data from multiple sources; Actual, BOP, Initplan and MARS Labor. The data is summarized to the ACCS, Fiscal Per F_MONTHLY_VARIANCE_RPT3	

- You are presented with a list of universes.
- The MARS teams has updated Universe Names and Descriptions during the migration to the new release.
- The word 'Adhoc' was removed from all universe names.
- The data source (CBS or MARS) was added in parentheses at the end of the universe name.

Creating WebI Documents: Save Document

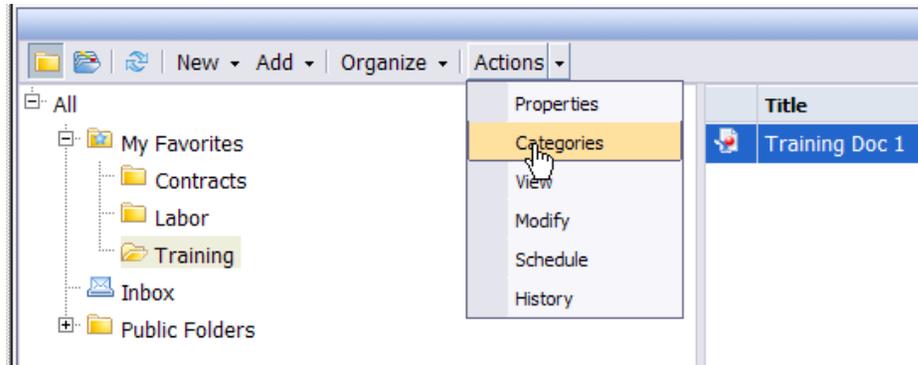


- The *Save Document* screen has changed.
- The first time you click Save, you will be prompted to select a folder and document name. Optionally you can specify a personal category.

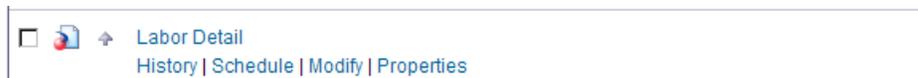


Creating Web Documents: Actions Menu

New Version



Previous Version



- The *Actions* menu is new. In the previous version the actions could be found underneath the document name.
- To use the *Actions* menu, highlight the document you would like to work with first.
- Alternatively you can right click on the document name to open the quick menu.
- A document Category is now changed via the *Categories* menu rather than the *Properties* menu.
- You can change the document name, description and keywords from the *Properties* menu.

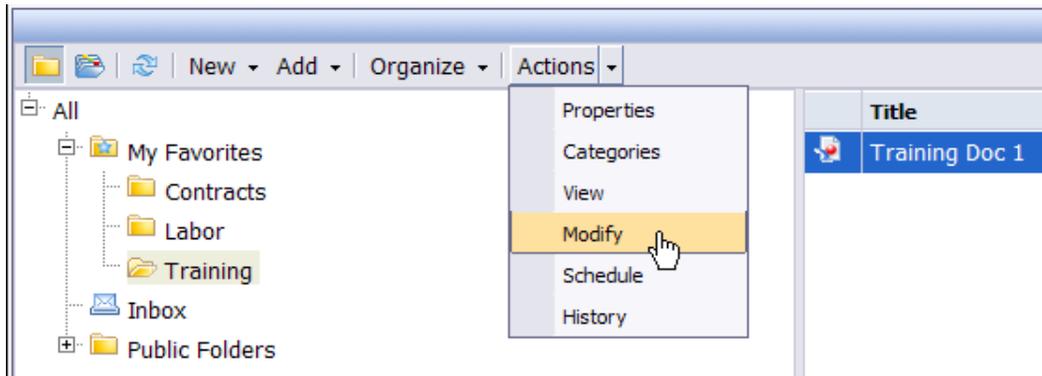
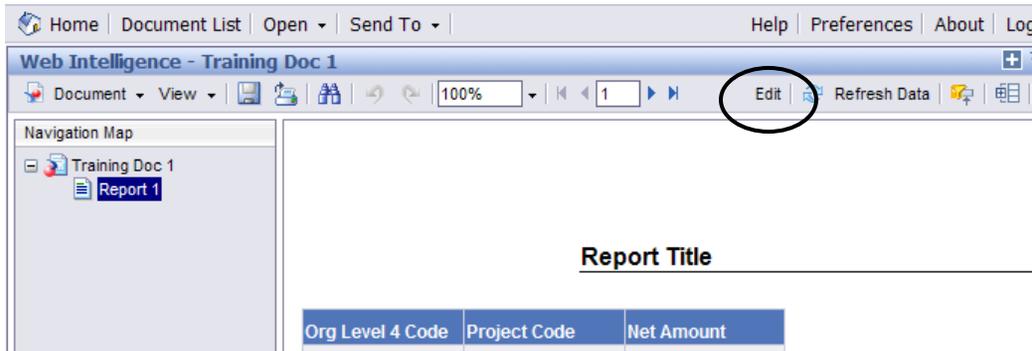
Creating WebI Documents: Actions Menu

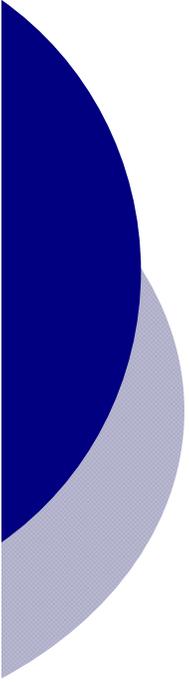
- You can open a document for editing in one of two ways:

- While in view mode
 - Click on the *Edit* option

Or . . .

- From the Detail Panel
 - Highlight the document* in the Detail Panel
 - From the *Actions Menu*, select *Modify*





Report Formatting

For the MARS R&Q Power User Only

Report Formatting: Formatting Toolbar

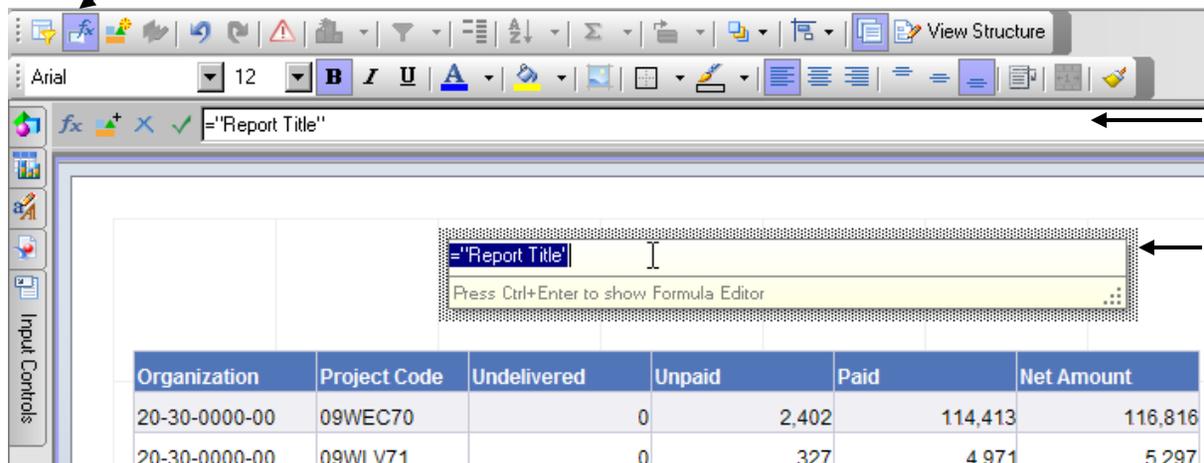


- Much of the cell formatting you have been changing via the Properties tab, can now be done more easily via the *Formatting Toolbar*.

1. Font
2. Font size
3. Bold
4. Italicize
5. Underline
6. Font color
7. Background color
8. Background image
9. Borders
10. Border color
11. Horizontal alignment
12. Vertical alignment
13. Wrap text
14. Merge columns
15. Format painter

Report Formatting: Formula Editor

- In the previous release, double clicking on a cell would position you in the *Formula Toolbar*.
- In the new release, a *Formula Bar* is opened in place.
- Click *Ctrl+Enter* to show the Formula Editor.
- You can still manually open the Formula Toolbar by clicking the icon.



Formula Toolbar is still available

Formula Bar opened in place

Report Formatting: Page Layout

The screenshot shows the 'Training Doc 2' report editor. The 'Properties' tab is active, and the 'Page layout' section is expanded. The 'Page layout' section includes the following settings:

- Top margin: 0.79 "
- Bottom margin: 0.79 "
- Left margin: 0.79 "
- Right margin: 0.79 "
- Page size: Letter
- Page orientation: Portrait
- Show page header: Yes
- Header height: 0.5 "
- Show page footer: Yes
- Footer height: 0.5 "

The report preview shows a table with the following data:

Org Level 4 Code	Project Code	Net Amount
20-30-0000-00	09WEC70	116,8
20-30-0000-00	09WLV71	5,29
20-30-0000-00	09WLV81	31,50
20-30-0000-00	E8M5J10	
20-30-0000-00	F2NS2AA	
20-30-0000-00	F8M5J10	1,025,5
20-30-0000-00	F8M5JGE	39,27
20-30-0000-00	F8M6JFM	-88

- *Page Layout* properties are more accessible in the new release.
- Switch to the *Properties* tab.
- If you do not see the *Page Layout* options, click within the white space of the report until they appear.
- Click the + sign if necessary to expand the Page Layout section.

Report Formatting: New Formula and Text Cells

Under *Templates* there are 3 new *Formula and Text Cells*:

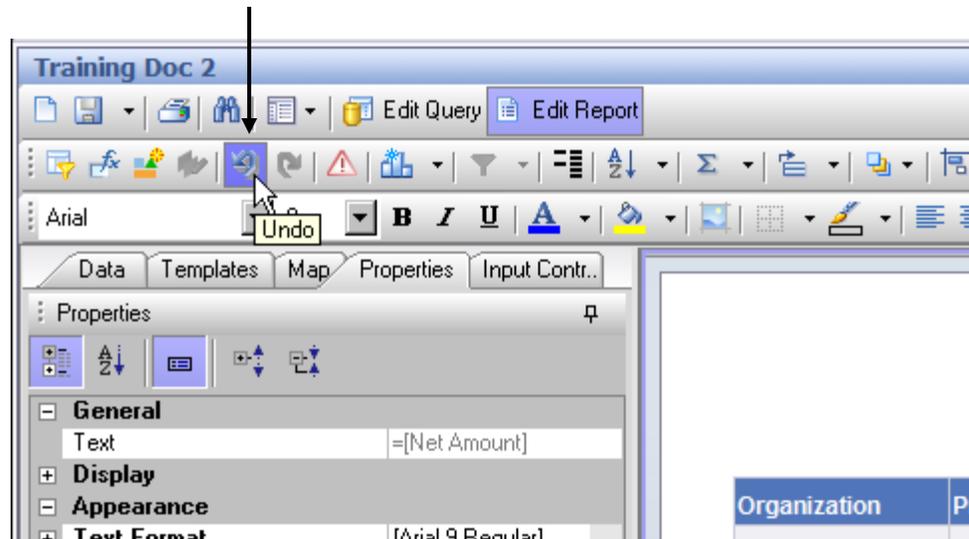
- Query Summary
- Prompt Summary
- Report Filter Summary

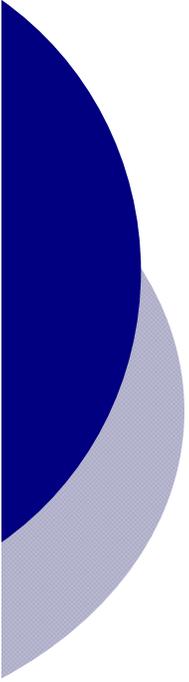
When cells of these types are placed on your report, they return detail information on query execution, query structure, prompt values entered by the user, and filters used on the report.

Examples are shown here.

Report Formatting: Undo Formatting

- If you make a mistake while formatting a report, you can click the Undo icon.
- The previous version allowed only one undo. The new version allows more than one.
- Be sure to Undo before you save. Saving clears the undo cache.





New Features

For the MARS R&Q Power User Only

New Features: Optional Prompts

Fund Code In list Enter value(s) for Fund Code: ?

Prompt

Prompt text: Enter value(s) for Fund Code:

Prompt Properties:

Prompt with List of Values Select only from list

Keep last values selected Optional prompt

Set default values

Type a value

> < ...

OK Cancel Help

- The Optional Prompt setting allows you to bypass a prompt without having to fill in an answer.
- Leaving the prompt blank has the same effect as the '*' for all option built into most Corporate Documents.
- Click the *Prompt Properties* icon to open the properties dialog and check *Optional prompt*.

New Features: Optional Prompts

Select or type the prompt values for each prompt below.

Enter value(s) for Fund Code: [optional] If no value is selected, this filter will be removed.

✓ FMC or LO for all **20-01**

✓ Fiscal Year **2009**

Type a value

Enter value(s) for Fund Code:

Refresh values

Fund Code	Fund Descr
*	ALL
0001	OR&F GENERAL OPE...
0002	INTERNAL FUND 13X...
0003	REIMBURSABLE (w/...
0004	REIMBURSABLE (w/...
0005	ADVANCES - SINGLE ...
0006	ADVANCES - MULTI ...
0007	REIMBURSABLE
0008	DIRECT FIN FLUND 13

Last Refresh Date: December 28, 2009 4:38:30 PM ...

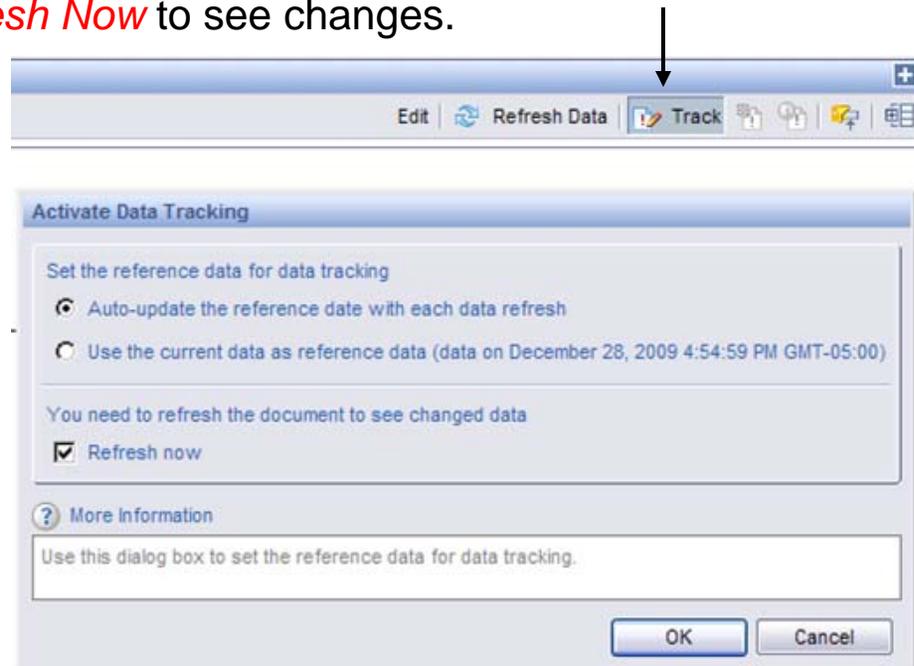
Enter your search pattern

Run Query Cancel

- When the query is run, the prompt box will be displayed.
- If the List of Values does not appear, click Refresh Values.
- With the new optional prompt you can either
 - Not select any funds
 - Select one fund
 - Select multiple funds
- When reports are run, the prompt text of optional prompts will contain the following note: *[optional] If no value is selected, this filter will be removed.*
- Note – the “*” for All will not work with a User Defined Prompt. If you want all funds, do not select any funds.

New Features: Data Tracking

- When you track data changes, you select a particular data refresh as a reference point. When you display the data changes on subsequent report refreshes, Web Intelligence places your current data in context by showing how it relates to the reference data.
- To turn on Data Tracking, click the *Track* icon.
- Determine if you want the reference data to be updated with each refresh, or to use a particular refresh date a fixed reference point.
- Check *Refresh Now* to see changes.



New Features: Data Tracking

- You can control the Data Tracking Options:
 - Insertions
 - Deletions
 - Changes
 - Increased Values
 - Decreased Values

Report Title			
Org Level 4 Code	Project Code	4-Digit Object Code	Net Amount
20-01-0000-00	F8M5JGA	11-12	834.01
20-01-0000-00	F8M5JGA	11-51	-58.99
20-01-0000-00	F8M5JGA	11-60	168.85
20-01-0000-00	F8M5JGA	11-82	887.11
20-01-0000-00	F8M5JGA	12-10	254.33
20-01-0000-00	G8M5JGA	11-12	901,530.86
20-01-0000-00	G8M5JGA	11-51	8,797.97
20-01-0000-00	G8M5JGA	11-59	47,849.51
20-01-0000-00	G8M5JGA	11-60	199,931.48
20-01-0000-00	G8M5JGA	11-80	347.58
20-01-0000-00	G8M5JGA	11-82	4,939.79
20-01-0000-00	G8M5JGA	12-10	285,682.96
20-01-0000-00	G8M5JGA	12-18	364.80
20-01-0000-00	G8M5JGE	11-12	46,709.01
20-01-0000-00	G8M5JGE	11-60	10,358.60
20-01-0000-00	G8M5JGE	11-80	537.46
20-01-0000-00	G8M5JGE	11-82	59.72
20-01-0000-00	G8M5JGE	12-10	14,801.47

Data Tracking Options

Format | Reference Data

Select which changes you want to display and their formats.

Dimensions

Insertions Cell Content Format...

Deletions Cell Content Format...

Details

Changes Cell Content Format...

Measures and details (numerical values only)

Increased values \$100.00 Format...

greater than or equal to 10.0 %

Decreased values \$100.00 Format...

greater than or equal to 10.0 %

OK Cancel Help

New Features: Fold / Unfold

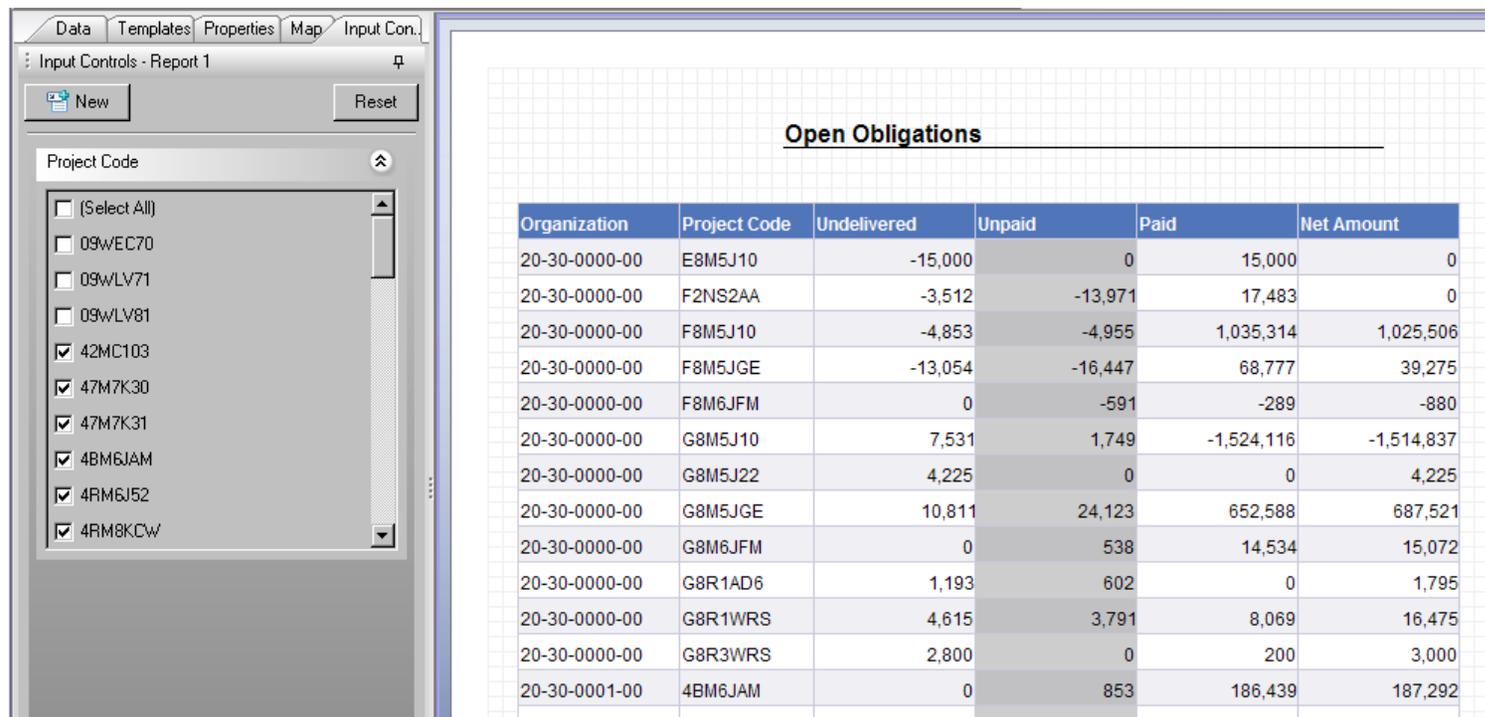
The screenshot shows a software window titled 'Training Doc 2' with a toolbar and a report titled 'Open Obligations'. The toolbar includes a 'Fold / Unfold' icon. The report contains a table with the following data:

Organization	Project Code	Undelivered	Unpaid	Paid	Net Amount
20-30-0000-00				438,548	430,771
20-30-0001-00	09WE			173,705	176,745
	09WLV71	0	369	23,204	23,573
	09WLV81	0	-2,454	58,800	56,346
	4BM6JAM	0	853	186,439	187,292
	E8M5J10	-6,674	0	6,674	0
	F8M5J10	-75,286	-20,095	94,137	-1,238
	F8M5J20	0	-1,178	1,178	0
	F8M5J72	0	-4,035	4,840	805
	F8M5JHP	0	-3,412	3,412	0
	G8M5J10	84,247	35,224	1,042,769	1,162,240
	G8M5JHP	910	1,651	10,307	12,868
20-30-0001-00	Sum:	3,204	9,962	1,605,465	1,618,631
20-30-0002-00	09WEC70	0	-4,492	34	-4,458
	09WLV71	0	-220	-1,588	-1,809

- If you don't need to see the detail rows within certain sections of your report you can use the *Fold / Unfold* toolbar.
- When a table or break is folded, the rows are concealed and headers and footers only are displayed.
- Tables must have headers and footers to be folded and unfolded.
- To turn on the Fold / Unfold toolbar click this icon.
- To fold a break, first click within the table, then click the arrows in the toolbar to the left.

New Features: Input Controls

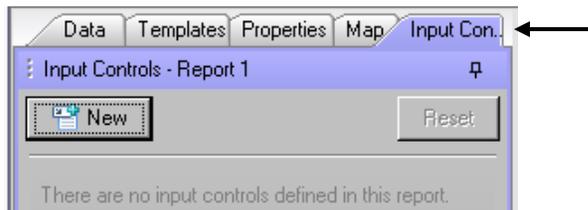
- Input controls provide a convenient, easily-accessible method for filtering and analyzing report data. You define input controls using standard windows controls such as text boxes and radio buttons. You associate these controls with report elements such as tables or section headers, and use the controls to filter the data in the report elements. When you select values in the input control, Web Intelligence filters the values in the associated report elements.



The screenshot displays the 'Input Controls' window for 'Report 1'. The 'Project Code' control is active, showing a list of project codes with checkboxes. The 'Open Obligations' table is filtered based on the selected project codes.

Organization	Project Code	Undelivered	Unpaid	Paid	Net Amount
20-30-0000-00	E8M5J10	-15,000	0	15,000	0
20-30-0000-00	F2NS2AA	-3,512	-13,971	17,483	0
20-30-0000-00	F8M5J10	-4,853	-4,955	1,035,314	1,025,506
20-30-0000-00	F8M5JGE	-13,054	-16,447	68,777	39,275
20-30-0000-00	F8M6JFM	0	-591	-289	-880
20-30-0000-00	G8M5J10	7,531	1,749	-1,524,116	-1,514,837
20-30-0000-00	G8M5J22	4,225	0	0	4,225
20-30-0000-00	G8M5JGE	10,811	24,123	652,588	687,521
20-30-0000-00	G8M6JFM	0	538	14,534	15,072
20-30-0000-00	G8R1AD6	1,193	602	0	1,795
20-30-0000-00	G8R1WRS	4,615	3,791	8,069	16,475
20-30-0000-00	G8R3WRS	2,800	0	200	3,000
20-30-0001-00	4BM6JAM	0	853	186,439	187,292

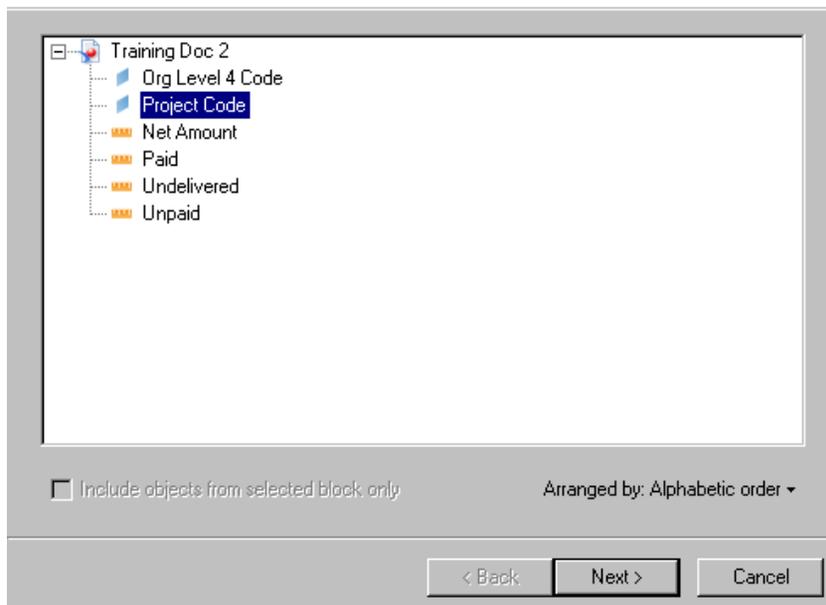
New Features: Input Controls



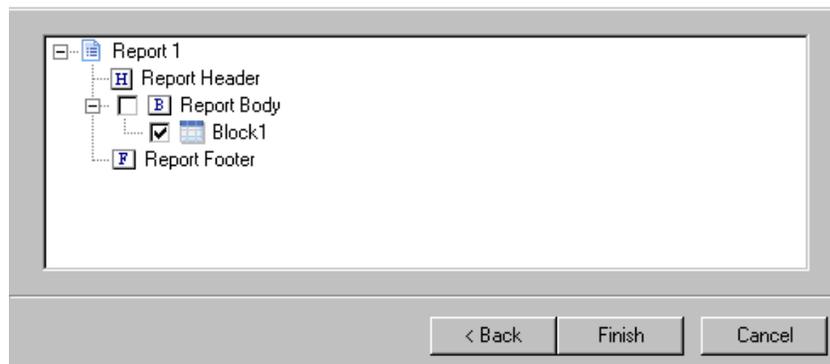
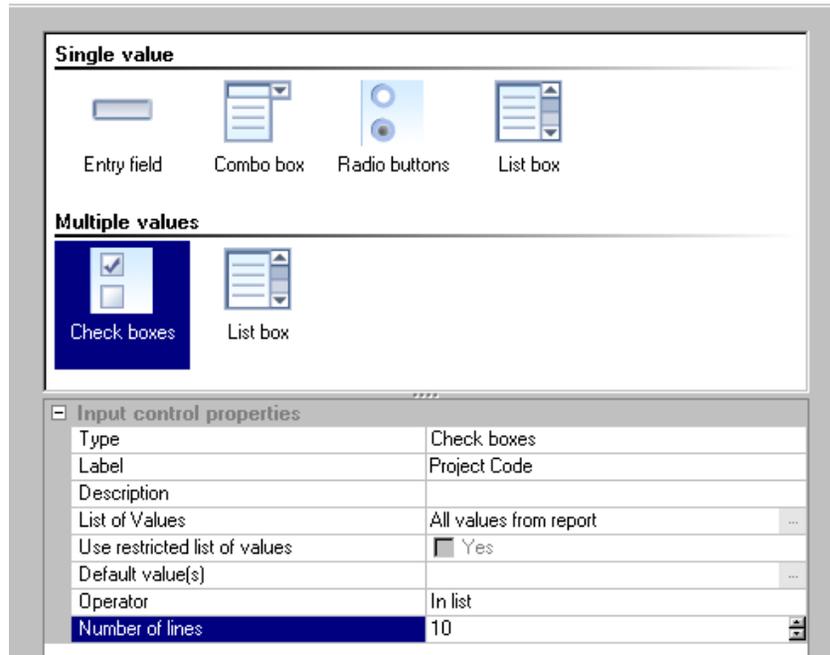
- To create an input control, switch to the *Input Control tab*.
- Click *New*
- Select an object to be assigned to the input control.

Select Report Object

Select the report object assigned to the input control



New Features: Input Controls



- First decide if the control will allow a *Single Value* or *Multiple Value*.
- Second pick a *Control Type*.
- The example on the previous page used a Multiple Value Check Box.

- Finally, determine which *Report Elements* the Input Control will apply to.