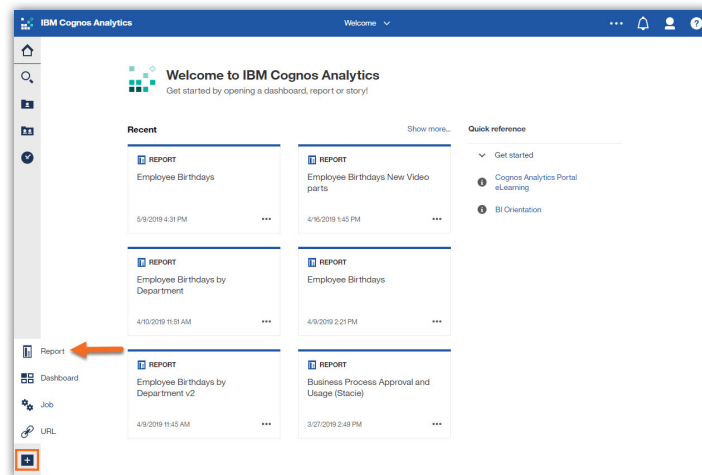


Building a Filter in a Business Intelligence Report

The steps below outline the process for creating a new filter in a Business Intelligence report.

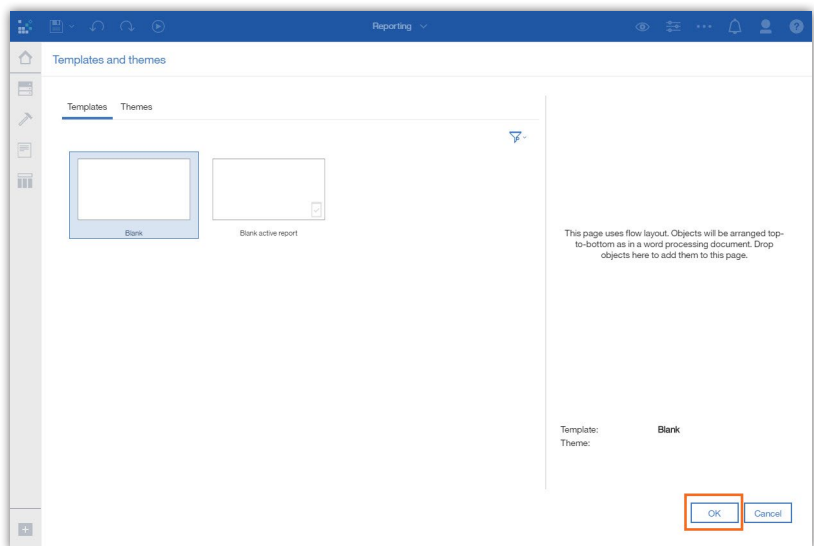
1

Start the creation process by clicking the + button on bottom left



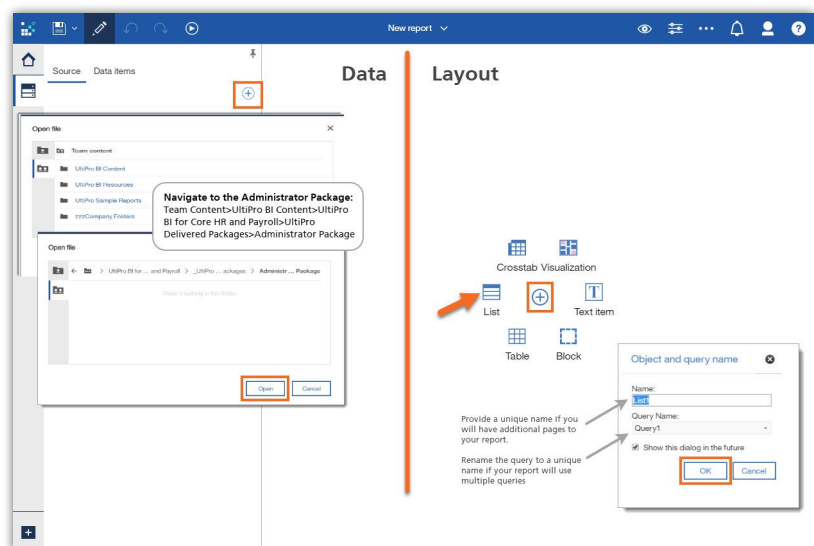
2

Choose a template and/or theme or leave on blank template and then click OK to open the reporting interface



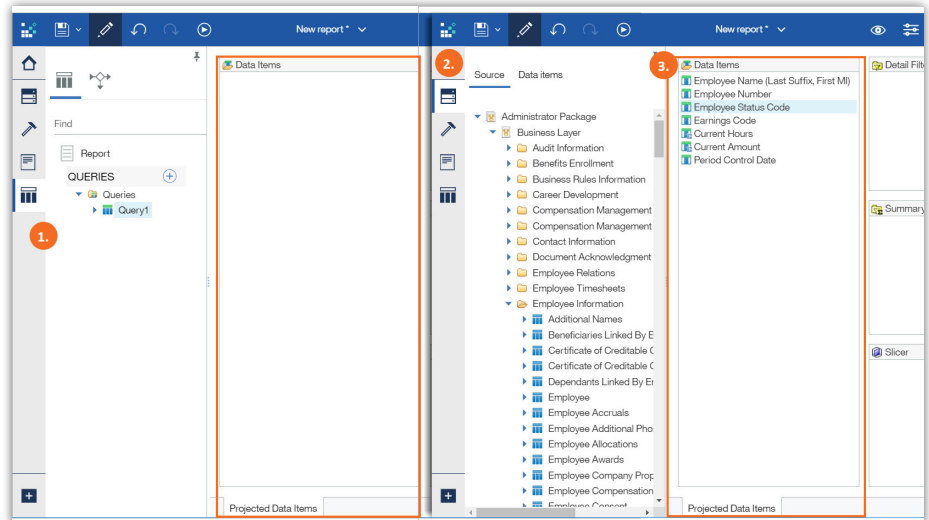
3

On right side, choose a report layout and on the left side, the data package to start building your report



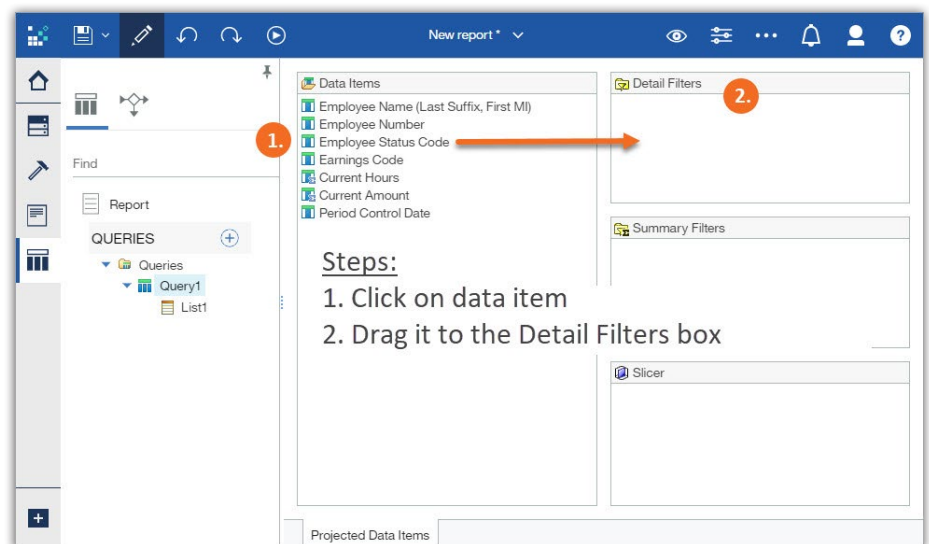
4

Open Queries page to add data items. To select the data items, go to Data drawer and drag the appropriate values to the Data Items box.



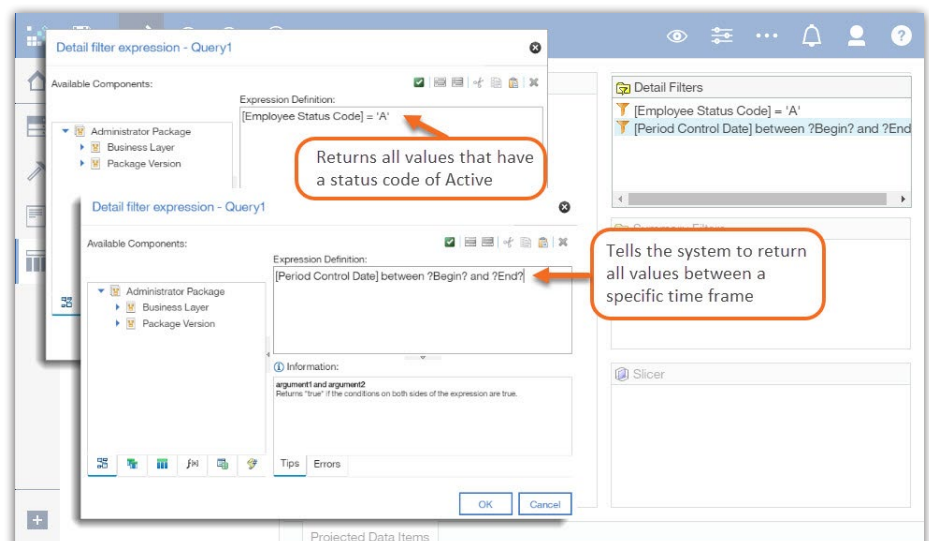
5

Start to create the first filter by dragging the data item to the Detail Filters box. Do this for all the values a filter is being built on.



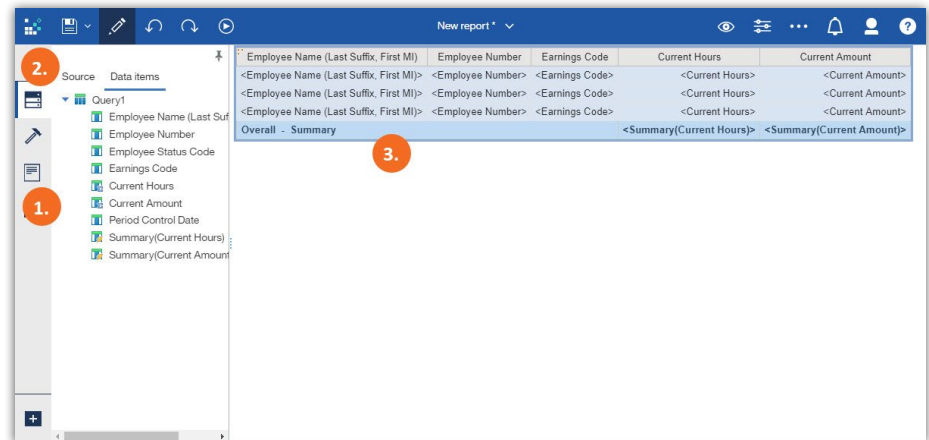
6

As you drag a data item to the detail filter box, the main filter query menu opens for specific filter instructions. Write the expression definition for each filter so the system creates the parameters on the value.

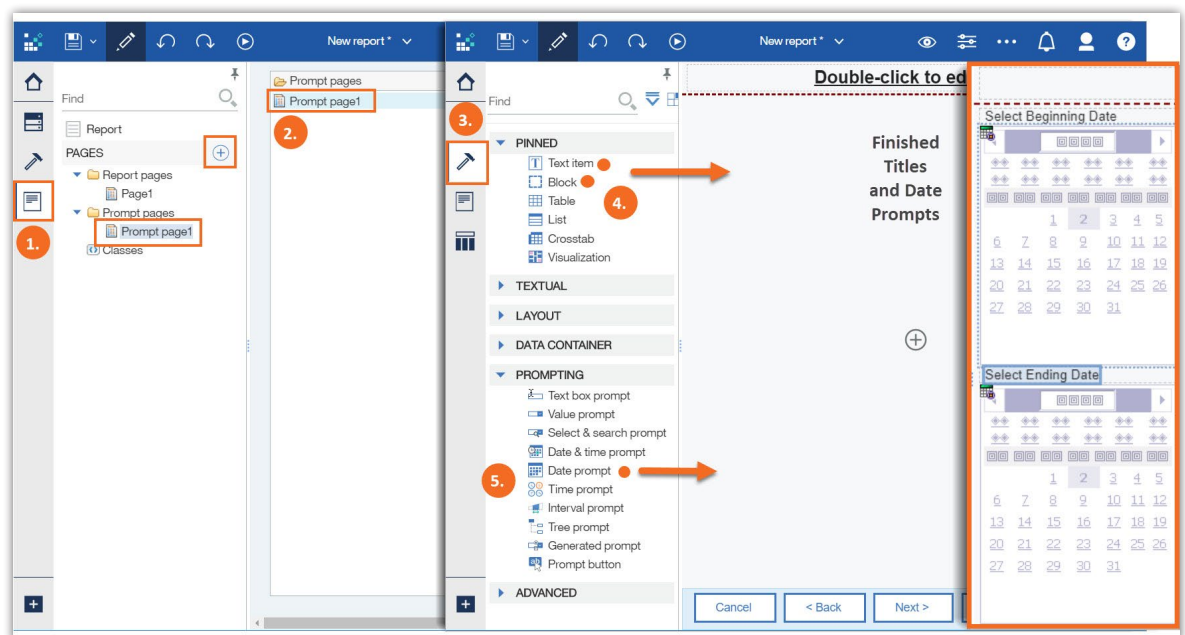


7

Build report using business requirements. Go back to the Report Page and drag necessary data items to the page.

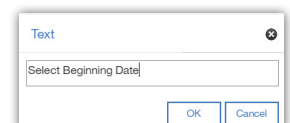
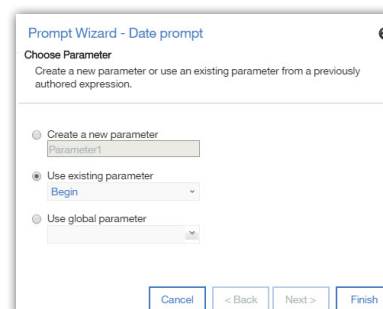


8



Build the Prompt Page following these instructions:

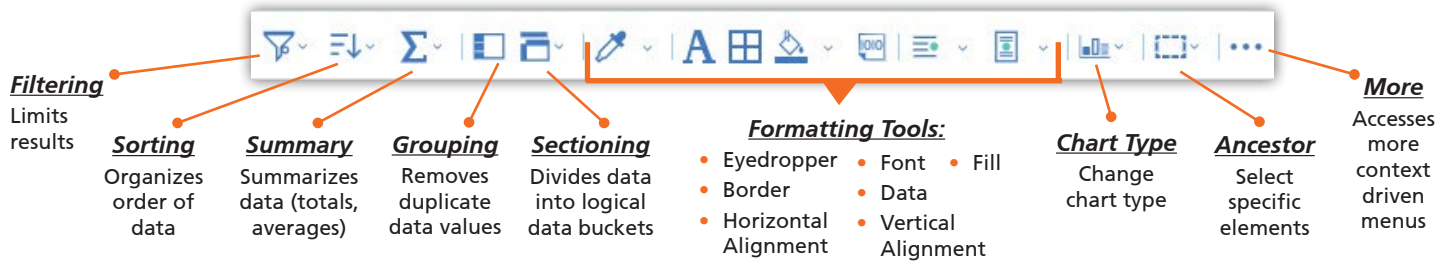
1. Click the Pages icon and choose Prompt Pages To add a new page, click the + sign
2. Double-click Prompt Page 1 to edit it
3. Open the Toolbox by clicking on the icon; Expand the Prompting category
4. There will be two prompts - 1 for Beginning Date and 1 for Ending Date. Both prompts need a title. To add titles drag a block container and a text item from the Pinned category to the page.
5. To add the date prompts, drag a Date prompt under the Beginning text and a second one under the Ending text.



Formatting Tools

There are many options when customizing a report. The next few pages list the most common tools, a short description of each, their most common editing actions, and instructions for each.

- **On-Demand Toolbar:** A context driven menu that displays elements based on the part of the report you click on.



- **Editing Menu:** Menu activated during the editing process giving you access to data sources, pages, and report objects. You can use this menu to add report objects.



Data:

Allows you to view the package (data source) used to write the report



Toolbox:

Contains a variety of objects for creating reports



Pages:

Shows you the report and prompt pages in the report



Queries:

Lists the queries and joins contained in the report

- **Columns:** Data in list columns can be rearranged, added, edited, and deleted. Only delete if you want data out of the report's data items AND the report. Instead, use scissors to cut the column from your report.

Moving Columns:

1. Click on column header
2. Drag and drop in new location

Adding Columns:

1. Columns are created when data items are dragged onto the report
2. See Adding Objects below

Editing Column Headers:

1. Click on column header
2. Click on More (...) button on toolbar
3. Choose Edit Data Label
4. Type new label

Deleting Columns:

1. Click on column header
2. Click on More (...) button on toolbar
3. Choose Delete

Columns:

- Columns are created when adding data items to a report
- Added data items appear on the right side of an existing column by default
- To add data items to a specific location, drag the item until you see the flashing black bar and then drop it



Department	Location	Job	Address
<Org Level 4>	<Location>	<Job>	<Address Line 1 + Address Line 2>
<Org Level 4>	<Location>	<Job>	<Address Line 1 + Address Line 2>

- **Adding Objects:** Reports are built by adding objects and manipulating them to create sophisticated layouts. Objects are also containers for holding other report objects such as lists, tables, images, text, or blocks.

Add Blocks:

Blocks are often used to lay out horizontal bands of information. Add a block to a report to hold text or other information.

1. Click on toolbox menu icon
2. Expand either the Pinned or Layout category to find Block
3. To add to an existing container (block): highlight object & double-click on block item from menu
4. To add to a specific location: click block item, drag it, and drop it

Add Data Items:

1. Click on data menu icon
 2. Choose the package where the item exists
 3. Two ways to add: double-click on data item OR right-click and choose insert
- NOTE:** Added data items will always appear on right side of list by default. To add to the left of a column, highlight the existing column before inserting the new data item

Add Text Items:

1. Click on toolbox menu icon
2. Expand either the Pinned or Textual category to find text
3. To add to a specific block: highlight block & double-click on text item in toolbar menu
4. To add to list or table: click that location, click and drag text item from toolbar menu, and drop it
5. When text Dialog box appears, type in text