

COBB COUNTY FINANCE DEPARTMENT WEBI USER'S GUIDE

Last Modified – September 2015

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WEBI USER'S GUIDE

General Information

- If you need a User ID, your Department Head should send an e-mail to Felicia Wright or Roxane Rush in the Finance Department.
- This guide is for creating and using simple tables from the Advantage Financial system. However, WEBI is capable of more complex functions. If you would like to learn more about other WEBI reporting capabilities, please contact Roxane Rush x1523 or Felicia Wright x1534.

Most information pulled from Advantage Financial will be from the previous day, it will not be current.

- The WEBI system WILL time out more frequently than the Advantage system and will give you an inactivity message before logging you out. Save reports often even if they are temporary. You can always delete reports that won't be used again.
- Since it is a Web & Windows based reporting tool, WEBI may look different on your computer based on your computer settings.
- If you have forgotten your password, contact Roxane Rush x1523 or Felicia Wright x1534 to have it reset.

> The WEBI address is: http://dcp-finws1prd/BOE/BI

> WEBI can also be accessed through the iCobb.

Accessing WEBI through iCobb.

1. From iCobb, under Department Resources, click on Finance & Economic Development. NOTE: WEBI only works in Internet Explorer. If you are using Google Chrome to reach iCobb, you will need to copy the link and paste it into an Internet Explorer window to use it.

DEPARTMENT RESOURCES				
Board of Commissioners	P.A.R.K.S.			
Communications	Police			
Community Development	Printing Services			
County Clerk	Probate Court			
County Manager	Property Management			
Department of Public Safety	Public Services Agency			
District Attorney's Office	Purchasing			
Department of Transportation	Record Management			
Finance & Economic Development	Risk Management			
Electrons & Registration	Safety Village			
Enterprise Fleet System	Senior Services			
Extension Services	Sheriff's Office			
Fire	State Court Administration			
Fleet Management	State Court Clerk			
Government Services Administration	Solicitor General			
Information Services	Superior Court Administration			

2. Click on the AMS NAVIGATION link under the heading QUICK LINKS.

QUICK LINKS
TRAVEL POLICY
FLOWER FUND
GAX1 Instructions
 CASH Handling MANUAL
AMS NAVIGATION
ACCOUNT DICTIONARY
VENDOR FORMS & INFO
PD POLICY

3. Click on the WEBI link under the heading QUICK LINKS.

HOME / CONTACT US	
ADVANTAGE FIN	IANCIA
QUICK LINKS	WELCOME
AMS FINANCIAL	
<u>WEBI</u>	
ADVANTAGE USER GUIDE	
WEBI USER GUIDE	
October 2014 MO TU WE TH FR	November MO TU WE
1 2 3 4	0.0.4.5
5 6 7 8 9 10 11 10 10 14 15 16 17 10	2 3 4 5

It is recommended that you save WEBI as one of your favorites or create an icon on your desktop for WEBI. This will save you steps in accessing WEBI.

To save WEBI as your favorite

1. From the Log in page, click Favorites.

P BI launch ad	
	CCI infoAdvantage Blaunch pad Enter your user information, and click "Log On". If you are unsure of your account information, contact your system administrator.
	CGI info Help

2. Click Add to Favorites.

Add to Favorites vorites Feeds History	
Favorites Bar	
Microsoft Websites	
MSN Websites Websites for United States	
Windows Live	CGI infoAdvantage
	Bl launch pad
	Enter your user information, and click "Log On". If you are unsure of your account information, contact your system administrator.
	System: DCP-FINRPT1PRD:6400
	User Name: Fwright
	Password:
	Log On
	CGI info Help
Turn on Suggested Sites	

3. Enter a name, or let it default. Click Add or OK.

Add a Favorite	2
	Add a Favorite Add this webpage as a favorite. To access your favorites, visit the Favorites Center.
Name:	Bl launch pad
Create in:	Favorites New Folder
	Add Cancel

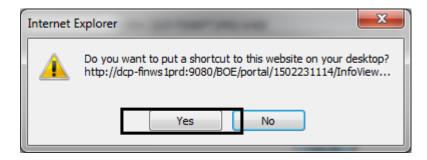
A link will then be placed in your favorites list.

To create an icon on your desktop

- From the login page, *right* click on your mouse button.
 Select Create Shortcut.

Enter your user information, and click "Log On"			Back
If you are unsure of your account information, contact administrator.	: your system		Forward
			Save Background As Set as Background
System: DCP-FINRPT1PRD:6400			Copy Background
User Name: fwright Password:			Select All Paste
		IJ	Blog with Windows Live
	Log On	2 1	E-mail with Windows Live Translate with Bing
CGI info	Help	~92	All Accelerators
			Create Shortcut
			View Source
			Encoding
			Print
			Print Preview

3. Click Yes when this message appears.



The WEBI link will be placed on your desktop.

Log into WEBI

Enter your User Name and Password. Both fields are case sensitive. If the system name is not showing up when you click in the link, copy and paste **DCP-FINRPT1PRD:6400** into the System box. Click Log On or press Enter.

CGI infoAdvantage Bl launch pad	
Enter your user information, and click "Log On". If you are unsure of your account information, contact your syste administrator.	m
System: DCP-FINRPT1PRD:6400 User Name: fwright Password: ••••••	
CGI info	Help

T nπp://acp-Tinws1pra:9080/ΒΟΕ/Β ン 🍷 😉 🛛 🌱 CGI intoAdvantage X CGI infoAdvantage Welcome: Felicia Wright | Applications - Preferences Help menu - | Log off Home Do nts My Recently Viewed Documents 0 unread messages in My Inbox My Applications Vendor Activity Report For Court System LW No unread message 👰 DBE List JV Print All Acct Lines 👰 CDBG Retainage Report Sample reports and universes See more ... My Recently Run Documents 0 Unread Alerts No recently run documents No unread alerts See more

The WEBI homepage should look similar to this:

Home Tab

The Home Tab contains the following defaults which allow you to manage documents.

- "My Recently Viewed Documents": lists the last 10 documents you viewed, sorted by view date, with the most recently viewed document at the top.
- "Unread Messages in My Inbox": lists the 10 most recent unread messages in your WEBI inbox. To view all messages, click See More in the lower-right hand corner.
- "My Recently Run Documents": lists the last 10 documents that you scheduled or ran with the status of each document. To view the status of the documents, click a report link.
- "Unread Alerts": shows the last 10 unread alert notifications. To view all alert notifications, click See More in the lower-right hand corner
- "My Applications": provides quick access to the applications

Documents Tab

Use the Documents Tab to view and manage objects in WEBI.

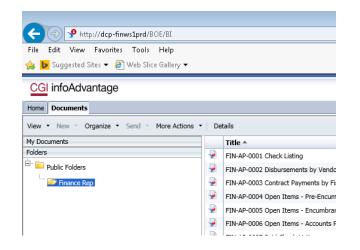
GL infoAdvantage		Welcome: Felicia Wright Applications - Preferences Help menu -	Log off
w wew v Organize v Send v	More Actions 👻 Details		æ ⊨ ∢ 1 of 1 ⊨
Documents	Search Results		
ers		No Items	
gories			
ch			
	₽		

To expand the folders list, click on the folder name.

My Documents contains My Favorites and Inbox. The My Favorites folder is where you can save your own personal reports, and the inbox contains any reports another WEBI user sends to you.

CGI infoAdvantage	
Home Documents	
View • New • Organize • Send • More Actions •	Details
My Documents	
🕀 🛅 My Favorites	
🝋 ~WebIntelligence	
🗁 Inbox	
··· 😫 My Alerts	
🔒 Subscribed Alerts	
Personal Categories	

All the documents that have been published are listed under Folders, then Public Folders, then Finance Rep.

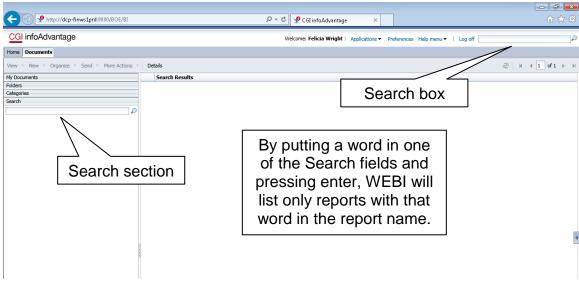


The total number of reports available is located at the bottom right corner. Click the next arrow to go to each page to view the available reports.

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iew • New • Organize • Send • More Actions •	De	etails					🎘 🕅 🖣 1 of 2+
ly Documents		Title 🔺	Туре	Last Run	Instances	Description	Created By
olders	-	0724 Acct Equip Revised	Web Intelligence		0		rrush
Public Folders	-	2010 - VENDOR (Activity Report)	Web Intelligence		0		Administrator
	۹.	2010 - VENDOR (Activity Report) pur	Web Intelligence		0		mdavid
Static reports	9	225 Monthly Revenue Report	Web Intelligence		0		mjohr
-	-	2X Check List by Fund Only	Web Intelligence		0		Ad
that are shared	9	2X OLGL Exp _Senior Srvs	Web Intelligence		0		
are listed under	- 	2X OLGL Expense Report by Org	Web Intelligence		0		
	- *	2X OLGL Inquiry Report 2X Senior Services Check List	Web Intelligence Web Intelligence				
Folders, Public		2x Vendor Activity by Fund_Dept	Web Intelligence		Cli	ck the ne	ext
		2x vendor Activity by Pund_Dept	web Intelligence		_		
Folders,					arr	ow to go	to
Finanaa Dan						•	
Finance Rep.					each	page to	view
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	1					reports.	
🐨 📁 R31001 Financial Reports	1						
R31001 HRM Framework Reports							
R31001 HRM Reports							
R31001 Metadata Reports							
🕀 🔚 Report Conversion Tool							
🖹 📔 Report Samples							
🔛 System Configuration Wizard							
🐵 📔 Visual Difference							
🗄 💼 Web Intelligence Samples							
ategories							
earch							

Searching for Reports

To search for a report, you can enter a word in the Search box at the top of the page or in the Search section.



After entering a word in the Search box at the top, the Search section will open with a list of reports with that word in the title. You can further refine the search by clicking on the filters on the left side.

		P ← C P CGI infoAdvantage ×	- 7 ×
CGI infoAdvantage		Welcome: Felicia Wright Applications Preferences Help menu Log of summary	p
Home Documents			
View • New • Organize • Send • More Actions •	De	ls	
My Documents		jearch Results	
Folders	-	Budget Summary Chucks YTD Budget and Expense Report	
Categories		summary of Adopted and Current Budget and Current Expenses and Balances - Select by FY and Unit (Edited 9/2/09)	
Search			
summary 🖉	-	tevenue Budget Summary	
Refine Search Results By:		Cobb County 3 7 Custom Reports/Finance Reports/Document	
type	-	IN-DEBT-0001 Loan Outstanding Summary	
web intelligence (38)		131001 Financial Reports/Debt Management	
shortcut (2) microsoft excel (1)			
crystal reports (1)	-	IN-DEBT-0005 Bond Outstanding Summary	
Refresh Time		231001 Financial Reports/Debt Management	
All (42)	-	IN-DEBT-0003 Lease Outstanding Summary	
Last Year (25) Last Ouarter (21)		131001 Financial Reports/Debt Management	
Last Month (20)	-	IN-BS-0002 Trial Balance Summary	
location		31001 Financial Reports/General Accounting	
cobb county 3_7 custom reports (16)	-	Revenue Budget Summary by Unit	
r31001 financial reports (13) r31001 hrm framework reports (3)			
r31001 financial framework reports (3)	\sim	Cobb County 3_7 Custom Reports/Finance Reports/Document	4
wpd (2) More		et Summary by Fund	
author	ilte	S 1_7 Custom Reports/Finance Reports/Document	
administrator (16)		ary Report by Unit	
sa (4) hrinfo (2)		20bb County 3 7 Custom Reports/Finance Reports/Document	
unknown creator (1)	-	Rudget Summary Report by Department	
2010 sap® businessobjects [™] , all rights reserved (1)			
datasource		Cobb County 3_7 Custom Reports/Finance Reports/Document	
inadv - execution statistics (6) fin - grants tracking (4)			
oparm - reporting parameters (2)			
fin - general accounting (2) fin - accounting summary (1)			
More			
Show more filters			
	11		

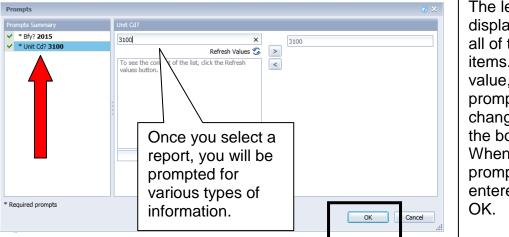
Open a Report

To open a report, double click on the title of the report.

C S P http://dcp-finws1prd:9080/BOE/BI		P = CG infoAdvantage × 00 ☆ 33
CGI infoAdvantage		Welcome: Felicia Wright Applications ▼ Preferences Help menu ▼ Log off summary
Home Documents		
View • New • Organize • Send • More Actions •	De	etails 🖉 H 🛛 1 of 5 🕨 H
My Documents		Search Results
Folders	-	Budget Summary Chucks YTD Budget and Expense Report
Categories Search		Summary of Adopted and Current Budget and Current Expenses and Balances - Select by FY and Unit (Edited 9/2/09)
		Internal Audit
summary	-	Revenue Budget Summary
Refine Search Results By:		Cobb County 3_7 Custom Reports/Finance Reports/Document
type		FIN-DEBT-0001 Loan Outstanding Summary
web intelligence (38) shortcut (2)		R31001 Financial Reports/Debt Management
microsoft excel (1)		FIN-DEBT-0005 Bond Outstanding Summary
crystal reports (1)		
Refresh Time		R31001 Financial Reports/Debt Management
All (42) Last Year (25)		FIN-DEBT-0003 Lease Outstanding Summary
Last Quarter (21)		R31001 Financial Reports/Debt Management
Last Month (20)	-	FIN-85-0002 Trial Balance Summary
location		R31001 Financial Reports/General Accounting
cobb county 3_7 custom reports (16) r31001 financial reports (13)	-	Revenue Budget Summary by Unit
r31001 hrm framework reports (3) r31001 financial framework reports (3)		Cobb County 3 7 Custom Reports/Finance Reports/Document
wpd (2)	1	Revenue Budget Summary by Fund
More		Cobb County 3_7 Custom Reports/Finance Reports/Document
author	-	Budget Summary Report by Unit
administrator (16) sa (4)		
hrinfo (2)		Cobb County 3_7 Custom Reports/Finance Reports/Document
unknown creator (1) 2010 sap® businessobjects™. all rights reserved (1)	1	Budget Summary Report by Department
datasource		Cobb County 3_7 Custom Reports/Finance Reports/Document
· · · · · · · · · · · · · · · · · · ·		

Running a Report

Some reports when opened will prompt you for information. If the report requires prompted information, a prompt box similar to this will appear.



The left side displays a listing of all of the prompted items. To change a value, click on the prompt, and then change the value in the box on the right. When the correct prompts have been entered, click on OK.

Important Things to Remember

- Fiscal Year must be 4 digits.
- If the Unit or Sub Unit has a letter in it, that letter MUST be capitalized. WEBI is very particular and requires search criteria to be exact.
- If it asks for a date, it will mean a greater than or equal to date for your search criteria.
- To list multiple items and if the report allows it, a semicolon must be placed between the items with no spaces. For example, if a user wanted fiscal year 2013 and 2014 they would type into the prompt 2013;2014
- You must click OK after entering prompted information.

Using Your Report

The report will look similar to this:

← → http://dcp-finws1prd:9080/BOE/BI		×			
CGI infoAdvantage	CGI infoAdvantage		Helo menu 🔻	Log off summary	
Home Documents Budget Summary Rep	, representation of the second s		Thep many	autimory	
	🔹 🏆 Filter Bar 🔚 Freeze 🔹 🕮 Outline				Reading - Design - (2)
User Prompt Input • «	i kui ku	Last refresh: 4/10/15 3	3:05:49 PM GMT-04:00		
Bfy? 2015 Unit Cd? Bfy? Bfy?	dget Summary Report by Ur	nit			
2) 3100 Bfy Fund Dept Unit Appr Objt	Object Current Description Budget	Encumbered Amt	Actual Exp Amt	Unobligated Amt	
2015 010 105 3100 106 6012 S	Salaries-Regular \$954,199.00	\$0.00	\$217,498.99	\$736,700.01	
2015 010 105 2100 106 6014 5	Salaries- Overtime \$2,500.00	\$0.00	\$457.29	\$2,042.71	
	Salaries- Parttime-Hourly \$320,713.00	\$0.00	\$86,281.48	\$234,431.52	
2015 010 105 3100 106 6022 P	Salaries-Sick \$0.00 Pay Bonus	\$0.00	\$4,325.73	(\$4,325.73)	
	Salaries-Leave \$0.00 Payout	\$0.00	\$0.00	\$0.00	
	Disability \$3,444.00	\$0.00	\$620.10	\$2,823.90	
2015 010 105 3100 106 6034 5	iica (Social Security & \$97,722.00 Aedicare)	\$0.00	\$21,902.43	\$75,819.57	
2015 010 105 3100 106 6036 In	fledical- nterfund \$270,395.00 ransfer	\$0.00	\$69,717.83	\$200,677.17	
	ife Insurance- Employee \$3,827.00	\$0.00	\$659.55	\$3,167.45	
	Retire Cont- County Sys \$170,375.00	\$0.00	\$44,899.86	\$125,475.14	
2015 010 105 3100 106 6045 C	Defined Contribution \$353.00 Employer Plan	\$0.00	\$86.12	\$266.88	
	Extend Health \$30,282.00	\$0.00	\$5,790.00	\$24,492.00	
	Inemployment \$0.00	\$0.00	\$0.00	\$0.00	
	Vorkers Comp Premium \$16,760.00	\$0.00	\$4,083.20	\$12,676.80	 ↓
	Dental-Interfund \$9,269.00	\$0.00	\$2,371.50	\$6,897.50	~ >
Budget Summary Report by Unit -	Track.	changes: Off H	4 Page 1 of 1	- H (= R)	100% • 🔃 < 1 minute ag

At the top and the left side of the report, there are several different options.

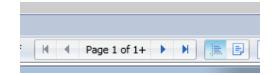
If you realized you entered incorrect information in the prompts, you can enter new information in the left side and click Run.

http://dcp-finws1prd:9080/BOE/BI								oAdvantage	×			☆ ☆
GI infoAdvantage							Welcome: Felic	ia Wright Applicat	tions Preference	es Help menu 🔻	Log off summary	
eb Intelligence • 🗋 😂 🛄 • 🖓 🕅			2 2 2		Terel		ill 🔹 🌠 Filter Bar 🏢					Reading - Design -
User Prompt Input	×	-) (- 10-	<u> </u>	Track	• 🕹 Dri	iii • 👎 riiter bar 🔛	Freeze · BE Outline		5 3:05:49 PM GMT-04:00		Reading • Design •
☐ Advanced ॡ Run Bfy?												
2015 Unit Cd?						E	Budget Summary	y Report by Ur	nit			
3100		Front	Deet	11-3	0	01-3	Object	Current	Encumbered	Actual Exp	Unobligated	
	Bfy	Fund	Dept	Unit	Appr	Objt	Description	Budget Amount	Amt	Amt	Amt	
	2015	010	105	3100	106	6012	Salaries-Regular	\$954,199.00	\$0.00	\$217,498.99	\$736,700.01	
	2015	010	105	3100	106	6014	Salaries- Overtime	\$2,500.00	\$0.00	\$457.29	\$2,042.71	
	2015	010	105	3100	106	6018	Salaries- Parttime-Hourly	\$320,713.00	\$0.00	\$86,281.48	\$234,431.52	
	2015	010	105	3100	106	6022	Salaries-Sick Pay Bonus	\$0.00	\$0.00	\$4,325.73	(\$4,325.73)	
	2015	010	105	3100	106	6024	Salaries-Leave Payout	\$0.00	\$0.00	\$0.00	\$0.00	
	2015	010	105	3100	106	6032	Disability Insurance	\$3,444.00	\$0.00	\$620.10	\$2,823.90	
	2015	010	105	3100	106	6034	Fica (Social Security & Medicare)	\$97,722.00	\$0.00	\$21,902.43	\$75,819.57	
	2015	010	105	3100	106	6036	Medical- Interfund Transfer	\$270,395.00	\$0.00	\$69,717.83	\$200,677.17	
	2015	010	105	3100	106	6038	Life Insurance- Employee	\$3,827.00	\$0.00	\$659.55	\$3,167.45	
	2015	010	105	3100	106	6044	Retire Cont- County Sys	\$170,375.00	\$0.00	\$44,899.86	\$125,475.14	
	2015	010	105	3100	106	6045	Defined Contribution Employer Plan	\$353.00	\$0.00	\$86.12	\$266.88	
	2015	010	105	3100	106	6049	Extend Health	\$30,282.00	\$0.00	\$5,790.00	\$24,492.00	
	2015	010	105	3100	106	6050	Unemployment Insurance	\$0.00	\$0.00	\$0.00	\$0.00	
	2015	010	105	3100	106	6052	Workers Comp Premium	\$16,760.00	\$0.00	\$4,083.20	\$12,676.8 <mark>0</mark>	4
	2015	010	105	3100	106	6054	Dental-Interfund	\$9,269.00	\$0.00	\$2,371.50	\$6,897.50	-
	<	ummary	Report	by Unit								>

You can also click on the Refresh Arrows at the top of the screen and the prompt box will display again. Enter different information and click ok, the report will run again with the new prompt information.



The report may have so much information that not all of the information can be displayed on one page. If you have more than one page, you can navigate through the pages by clicking on the Go to Next Page or Go to Previous Page links at the bottom of the page.



The Find feature at the top of the page allows a user to search the report by any criteria. This feature only works with reports that have been saved in the public folder or in your personal folders. The find feature only searches the current page displayed in the report. To find specific information, it may be easier to open the report in Excel and use the sort, search and filter options in Excel.



The Save Icon allows you to choose Save or Save as.



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CGI infoAdvantage								Welcome: Feli	icia Wright Appli	cations - Preferenc	es Help menu 🕶 🗎	Log off summary	P
Home Documents Budget Summary Rep													
Web Intelligence • 📄 🧀 🚰 🖗	18 🗐 🚢 •		5	2 2 ²	• 🖪	Track •	• Ţ Dri	ll 🔹 🏆 Filter Bar 📗	Freeze 💉 🖷 Out		15 3:54:42 PM GMT-04:00		Reading • Design • ② •
Advanced © Run Bfy? 2015 Unit Cd?							_∎	Budget Summar	ry Report by l				Â
(?) 1000		Bfy	Fund	Dept	Unit	Appr		Object Description	Current Budget Amount	Encumbered Amt	Actual Exp Amt	Unobligated Amt	
	$ \left \right\rangle $	2015	230	130	1000	195	6012		\$38,526,422.0	0 \$0.00	\$9,718,397.31	\$28,808,024.69	
	V V	2015	230	130	1000	195	601	Refres	sh is 🧧	0 \$0.00	\$139,249.24	\$130,750.76	
	\Box	15	230	130	1000	195	601	here	e. ^{p.o}	D \$0.00	\$214,607.16	\$418,182.84	
	Cli	-	-		-		601	Hourly	p.o	0 \$0.00	\$17,041.95	\$60,958.05	
	sa	ve	rep	or	t.		6022	Salaries-Sick Pay Bonus	\$0.0	0 \$0.00	\$82,886.51	(\$82,886.51)	
		2015	230	130	1000	195	6024	Salaries-Leave Payout	\$0.0	0 \$0.00	\$34,040.64	(\$34,040.64)	
		2015	230	130	1000	195	6032	Disability Insurance	\$141,945.0	0 \$0.00	\$25,980.80	\$115,964.20	
		2015	230	130	1000	195	6034	Fica (Social Security & Medicare)	\$3,022,301.0	0 \$0.00	\$685,695.73	\$2,336,605.27	
		2015	230	130	1000	195	6036	Medical- Interfund Transfer	\$9,628,992.0	0 \$0.00	\$2,568,704.75	\$7,060,287.25	
		2015	230	130	1000	195	6038	Life Insurance- Employee	\$157,717.0	D \$0.00	\$27,634.90	\$130,082.10	_
		2015	230	130	1000	195	6040	Med Plan Dep Cov Infd Tr	\$0.0	D \$0.00	Got	o Othe	r
		2015	230	130	1000	195	6044	Retire Cont- County Sys	\$7,289,215.0	D \$0.00		ages	
		2015	230	130	1000	195	6045	Defined Contribution Employer Plan	\$74,770.0	0 \$0.00	L vzo		
	<	2015	230	130	1000	195	6048	Retire Contr-Tr Judge&Sol	\$0.0	0 \$0.00	\$0.	\$0.00	~ ~
	B	udget S	ummary	Report	by Unit						· · ·	V	
Budget Summary Report by Unit •						_	_		🛃 Trac	k changes: Off	Page 1 of 1+		100% 🔹 🛞 4 minutes ago

To Open or Save the Report in Excel

Click on the drop down arrow next to the Export Icon. Select Export Document As and then select Excel.

CG	CGI infoAdvantage									
Home	Documents Budget Summary Rep 🕫		×	_						
Web	Intelligence 🔹 📄 🧀 🔛 🕴	Θ	Ŀ.	• 🖂 •	5	× 2	•	🖇 Track 🔻	😨 Dr	ill - 1
	User Prompt Input • «			Export D	ocument	As	۲.	PDF		
	🗊 Advanced 🛛 😂 Run			Export C	urrent Re	port As	•	Excel 200	7	
6	Bfy?			Export D	ata to CS	v		Excel		Ren
	2015			2015	230	130	1	CSV Archi	ive	Ren
	Unit Cd?			2015	230	130	1	Text		Con
(?)	1000			2015	230	130	1000	196	6577	Frei

You will receive a prompt to Open or Save the report. The open option will open another window with the report in an Excel spreadsheet. This process will download the raw data; it may take some cleaning up, such as adjusting column width.

The save option will prompt the user to save the excel file in their desired location and create a name for the file, but it will not open a new window.

(If you choose Export Current Report As and there are multiple tabs to the report, it will only export the current tab. Choose Export Document As to export the entire report.)

To Print a Report

You can save or open the report in Excel or PDF in order to print the report. You can also open the report in PDF to print by clicking the Print Icon. The report will open in a PDF file to print.

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	2015				2015	230	130

Creating Custom Reports Selecting a Universe

You can begin to create a custom report in two ways. Click Applications at the top of page and then choose Web Intelligence or go to the Home tab and click on the Web Intelligence icon.

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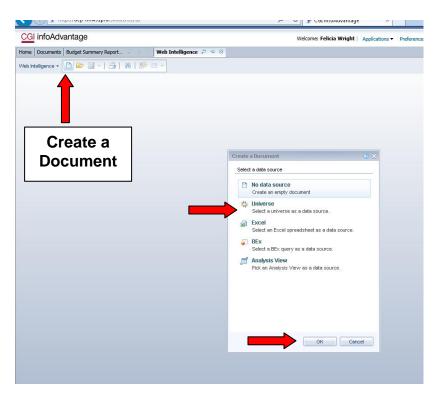
If this box appears, select the box and click on Run.

Security	Warning		
Do y	ou want t	o run this	application?
		Name:	SAP BusinessObjects Web Intelligence
	<u> </u>	Publisher:	SAP AG
		Location:	http://dcp-finws1prd:9080
Runni	ng this app	lication ma	y be a security risk
Risk:	information at	risk. The inform	inrestricted access which may put your computer and personal nation provided is unreliable or unknown so it is recommended not to u are familiar with its source
	Unable to ens	ure the certifica	ate used to identify this application has not been revoked.
	More Informal	tion	
Select	the box belo	w, then click	Run to start the application
V	Laccept the ris	sk and want to	run this application.

If this box appears, select the box and click on Allow.

Securiț	y Warning
_	Allow access to the following application from this web site?
	Web Site: http://dcp-finws1prd:9080
	Application: SAP BusinessObjects Web Intelligence Publisher: SAP AG
	This web site is requesting access and control of the Java application shown above. Allow access only if you trust the web site and know that the application is intended to run on this site.
V [Do not show this again for this app and web site. Allow Do Not Allow
!	<u>Nore information</u>

Click on the Create a Document icon and the Create a Document screen will come up. Click on Universe to view the universes available and then click OK.



You will see a list of universes. Universes provide access to information that reflects the different functional areas of the CGI Advantage Financial operational system. Links are established between Universes to connect information that is functionally or logically related in the source system. For example, the General Accounting Universe contains general accounting information while the Cost Accounting Universe contains cost accounting information. Both Universes are linked to the Chart of Accounts Universe that contains chart of account elements information used by the general accounting and cost accounting functional areas.

Selecting a universe will display a summary of the universe in the Help section at the bottom. To choose a universe, either double click on it or highlight the universe and click the Select button at the bottom right.

vailable	e Universes:		😂 Refresh universe I
tate	Name	 Revision 	Folder
	FIN - Accounting Summary	78	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Accounts Payable	487	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Accounts Receivable	233	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - ARRA Reporting	51	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
G	FIN - Bond Registry	42	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Budget Vs Actual	231	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - CAFR	50	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Charge Documents	65	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_640C
	FIN - Commodity Journal	181	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Cost Accounting	92	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Document Catalog	533	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Fixed Asset Documents	177	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Fixed Assets	481	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Future Document Triggering	14	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_640C
	FIN - General Accounting	307	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - General Accounting Documents	333	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
	FIN - Grants Tracking	82	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
٢	FIN - Internal Costing	56	@DCP-FINRPT1PRD.SS.COBBROOT.LOCAL_6400
•	111		•

Things to Know:

- Depending on your security, you may see fewer or more universes.
- You can only create reports from one universe and one class at a time.
- A specialty universe like Purchasing would have more fields to report from for Purchasing Documents. The same is true for the Inventory and Fixed Asset universes.
- Most of the universes report on documents in Final or Historical (Final) phase. Only a few contain information regarding documents in a Draft or Pending phase.

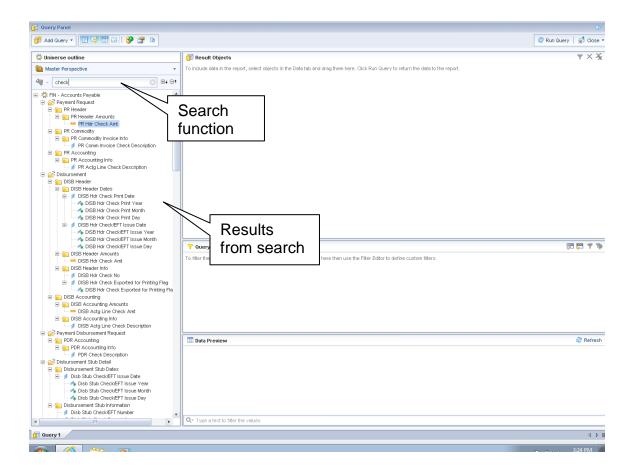
Selecting Fields

After selecting the universe, the Query Panel will display.

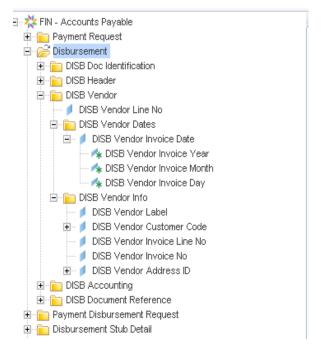
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	Result Objects To include data in the report, select objects in the Data tab and drag them here. Click Run Query to return the data to the report.	▼ × ¾
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Once here, go through the list of classes to determine where you want to create your report from. This list is in no particular order.

If you are unsure of what class to use, there is a search feature that can help you narrow down the list of classes to create your report from.



Once you find the class you want to report from, click on the title to expand and see the list of fields available. The fields may be organized under another file such as **DISB Vendor Info** that will need to be expanded to see the fields.



Usually the fields are filed just as they appear in the table on-line. For instance, the document code (i.e. RQS, PO, JV, CR) and ID number are in the **Document/Referenced Info** section just as they appear in the **Accounting Journal** in the financial system. *Hint: It is helpful to open the Advantage Financial System and go to the table or page you want to report from so you can see where the fields are located.*

It is best to build your report from the same class. In some cases you may be able to pull fields from different classes, but usually this isn't possible. An example of this is the name field from the Object or Sub Unit table. Usually, you can pull these name fields for your reports, but pulling different fields from multiple classes could give you an error if the classes have not been linked together in the background. If you need classes linked together to create your report, contact Roxane Rush x1523 or Felicia Wright x1534 in the Finance Department. You can click and drag the fields you want in your report to the **Result Objects** and **Query Filter** sections. For your **Result Objects**, place the fields in order by dragging them left and right. You can also add fields by double-clicking them from the list and they will appear in the **Result Objects** section in the order that you double-click them. If you pull the wrong field by mistake, just click on that field within the **Result Objects** section and press delete.

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If you pull the wrong field by mistake, either click on that field within the **Result Objects** section and press delete, or click on the field and click the Remove icon above the Results Object section. To delete all the fields, click the Remove All icon.

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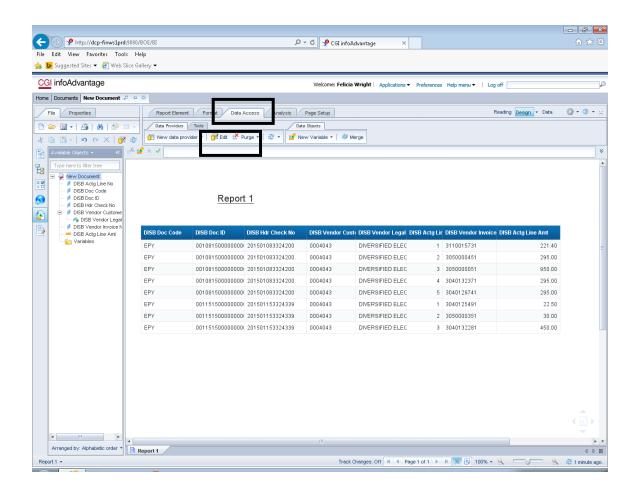
After you have chosen your result object and query fields, you can click on the Refresh button on the Data Preview section to see a draft of your document before you run the report. If you have any errors or the data is not what you are looking for, you can update your table headings and/or queries and click Refresh again. It will update the information in the Data Preview section.

Iniverse outline	🗊 Result Objects			T X
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When you are ready to run your report, click on Run Query

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Your report will pull up. If you decide to make changes, or define additional conditions, click on the Data Access Tab, then click on Edit.



Defining Conditions

The fields can also be clicked and dragged into the **Query Filter** area.

From here, you can change the condition's type of filter from the pre-set 'In List' to a number of conditions by clicking on the dropdown arrow next to the 'In List' phrase. Other useful conditions are: 'Greater than', 'Not in list' and 'Greater than or equal to'. To set your values, click on the dropdown arrow to the right of 'In List'.

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In the box just to the right of where you enter your criteria, you can select from the following list of value options:

- **Constant** This will allow you to enter a number, Doc Cd such as RQS or date.
 - Caution: Letters capitalized or lower case have to match exactly as they appear in Advantage Financial.
- Value(s) from list This will give you a list of possible values for this field and you can use this list. This is helpful if you are not sure exactly how the constant appears.
 - Caution: The longer the list of possible values (i.e. Dates) the longer it will take to create this list.
- Prompt This will prompt you to choose a value each time the report is refreshed.

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If you want to set a condition on a field that you do not want to show up in the report, you can select a field from the same class. Find the class you first used to select fields and drag over a field to the **Query Filter** section. Again, go through the steps of selecting the condition operator and defining the constant. Be careful, you must select a field from the SAME class you used to create the report.

If you forget which class you created the report from, click on one of your Result Objects, and it will highlight which class the object came from.

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A Guide to Posting Codes

One of the fields that you may want to set as a condition, but not show the field in your report is the **Posting Code.** If you are reporting from the Accounting Journal, every document will have several accounting entries (DR & CR) to different accounts. By defining the Posting Code, you tell WEBI which side of a document you want to pull information. If you don't select any Posting Codes, your totals will equal zero because every Debit must = a Credit for every accounting transaction. If you want to report from Automatic Disbursements (AD-check), but only want the entries that affected Cash Expense, then you would set your Posting Code equal to D014. This is the posting code for External Cash Expenditure. For your convenience, here is a list of the most commonly used posting codes.

Posting Code	Name	Use
A001	Cash	Cash BS Acct
D011	External Accrued Expenditure	Accruals
D014	External Cash Expenditure	Expenses
D022	Inventory Cash Expense	Inventory Expense
D023	COGS	Inventory
P003	Pre Encumbrance	Dr for Pre Enc
P005	Encumbrance	Dr for Encumbrance
R001	Billed Earned Receivable	Receivable
R003	External Collected Earned Rev	Revenue
S001	Inventory/Stock Items	Inventory Assets

The following Posting Codes are for MY (multi year) Expenses and Revenues for Units that had activity prior to 2004. These posting codes were used to bring over these balances from prior to 2004 for MY projects.

ITD1	Inception to Date Balance	MY Expenses
ITD2	Inception to Date Balance	MY Revenues

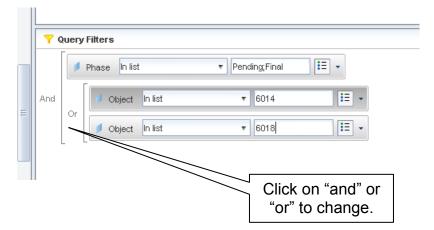
Hint: To gain a better understanding of Posting Codes, look at the **Posting** component of any document in Advantage Financial.

If you want to be sure to capture all expenses including any accruals made by the auditors at year-end, then you should set up a condition like this:

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Setting Other Conditions

Sometimes it is useful to use various combinations of conditions to get the desired information.



Using "Wildcard" Searches

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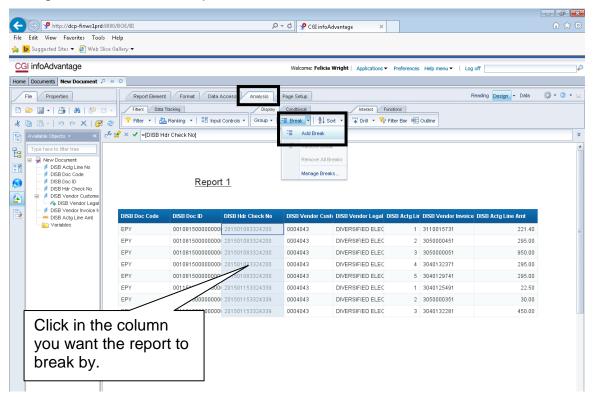
From here, you can use the % symbol in the constant to fill in blanks as "wildcards". For example, looking for **CW Matthews Construction Co.**, you could type in **C%W%MAT%** as the constant and it would bring back all vendors matching that pattern.

Editing Your Report

You can use standard functions available in WEBI. Make sure you are in Design Mode and there are several tabs at the top that allow you to make edits and design your report.

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To insert a break, click somewhere in the column which you want the report to break by. Click on the Analysis tab, then click on Display. Click on the drop down arrow next to Break and you can add breaks where there is a change in the field of the report.



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To sort ascending or descending, click somewhere in the column which you want the report to sort by, then click on Analysis, then Display. Click on the drop down arrow next to Sort and it will allow you to sort by a field on the report.

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To do calculations, click somewhere in the column which you want the calculations, then click on the Analysis tab, then click on Functions. Click on Count or the drop down arrow next to Sum or More and you can add calculations to your report.

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You can also highlight a field and right click on it to select the various ways to design the report. For example, if you want to sort according to the Vendor name, highlight the Doc Vend Legal Name column and right click on it. You will see a list of available functions for that type of data (i.e., sort, break, etc.)

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Saving Your Report

If you want to save the report to be refreshed in the future, you have several options.

- Save This option saves the file to your <u>Favorites</u> file or the <u>Public Folders</u>.
- Send to This option sends your report to the <u>Inbox</u>
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	EPY	0011515000000004260		0004043	DIVERSIFIED ELEC	2	3050000351	30.00
	EPY	0011515000000004260		0004043	DIVERSIFIED ELEC	3	3040132281	450.00
			201501153324339				Count:	3
							Count:	8
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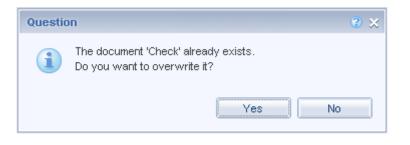
This screen will appear. You can click on the double arrow under Save As Type to see more options for saving such as adding descriptions, keywords, and the option to for the report to refresh on opening.

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Fill in the Name for your report. The description and keywords are not required. You can select a Personal Category to file it under. **Refresh on open** will update the report every time it is opened. If you do not select a refresh option the report will have to manually refresh each time it is opened. Click **Save** when you are done.

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If you are editing a report and want to save it under the same name, choose **Yes** after clicking **Save**.



Modify an Existing WEBI report

You can modify any report in the Public Folders files, but you cannot change it and then re-publish the report using the same name. In other words, you can't "break" a report if you try to modify it. Sometimes it is easier to start with an existing report and modify it for your specific needs. Once you make your changes, you can save it in your Favorites.

Search for the report you want to modify. Once you find the report, double click on it to open.

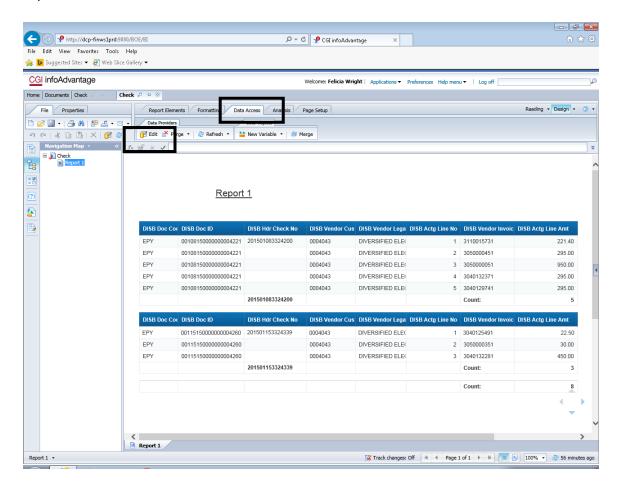
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The report will open in a Reading Mode. When the report pulls up, you will need to click on Design.

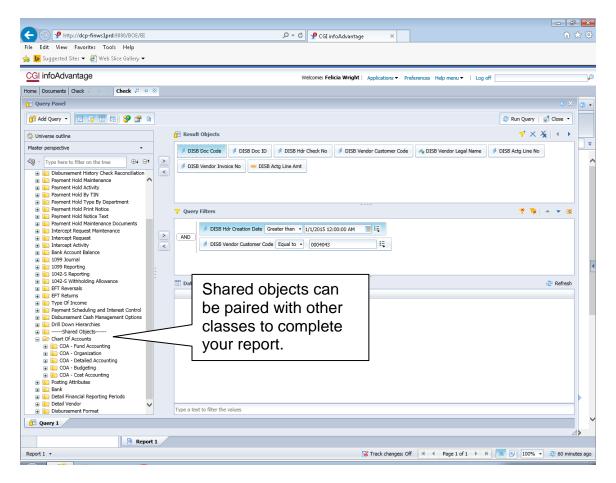
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	EPY	0010815000000004221		0004043	DIVERSIFIED ELE	3	3050000051	950.00
	EPY	0010815000000004221		0004043	DIVERSIFIED ELE	4	3040132371	295.00
	EPY	0010815000000004221		0004043	DIVERSIFIED ELE	5	3040129741	295.00
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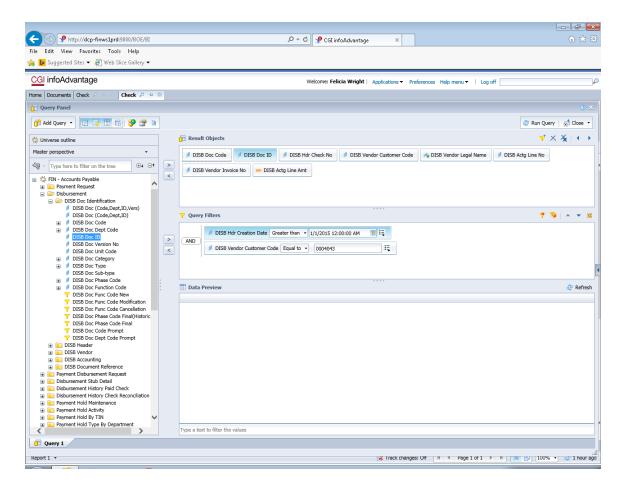
If you would like to add additional fields to the report click on Data Access, then Edit. On this screen you can click and drag the fields you want in your report to the Result Objects section, just as you would if you were creating a new report. You can also add or modify the Query Filters for the existing report.



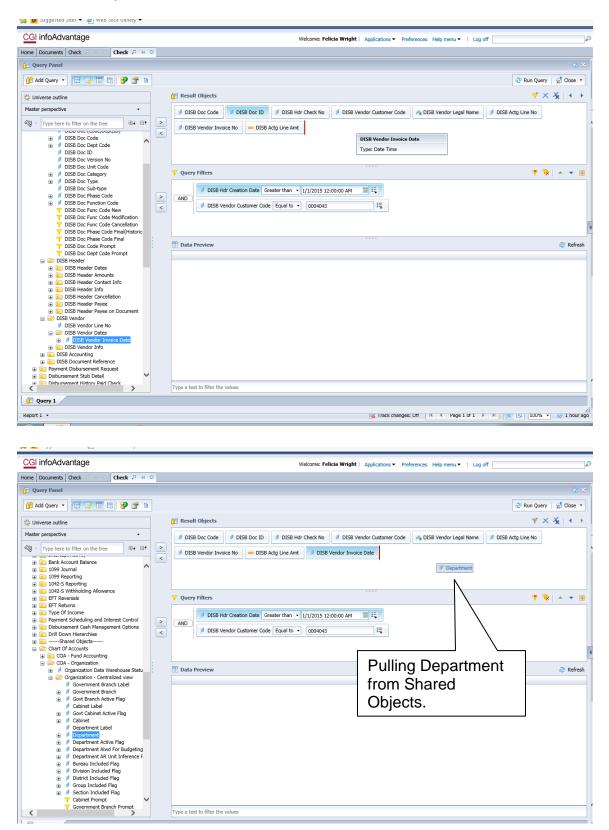
When modifying the report, remember, it is best to add **Result Objects** from the same table the original report was created from. There are some universes which have Shared Objects that can be used with one or more tables. Please refer to the Financial Universes Guide to determine which of the Shared Objects can be paired with a certain class.



To begin modifying the report, expand the class you are going to use fields from.



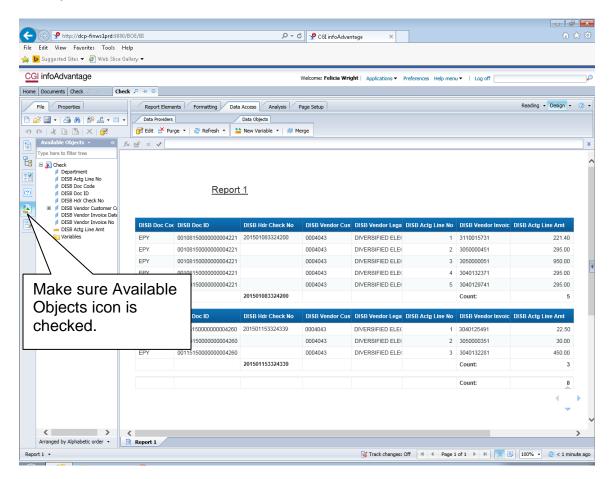
Select the object you want to add to your report, and then drag and drop it in the Result Objects section.



Click on Run Query. (If there are prompts, you will need to enter them, and then click Run Query.)

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The report pulls up, but the fields that were added do not automatically show up in the report. They are in the Available Objects section, but not in the report section.



In the Data box, you will need to find the fields you added in the Data section, and then drag and drop it into the report.

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If you drop the field correctly, it will appear in the report where you have placed it.

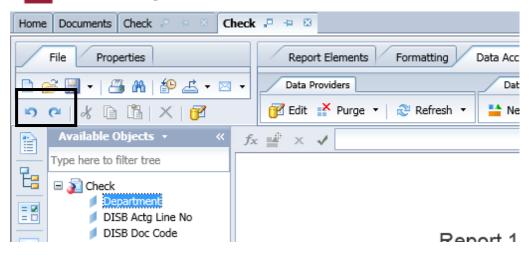
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Here are some examples of incorrect ways to drop the field. If you drop the cell in any of these incorrect ways, you will not get the results you desire from the report. DO NOT DROP THE FIELD if it looks like this:

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WEBI has an undo button. If you perform an action that you didn't mean to, click on the undo button.



Send a report to another WEBI user's inbox

Select the report and then click Send on the toolbar. Click on BI Inbox.

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You can search for the ID (Find Title) or the name of the user.

Enter your search criteria, click on the Find icon and the results will display. Wildcards will **not work** in the search.

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You can send your report to more than one recipient if you would like. Search for another user and then move that user from Available to Selected Recipient by clicking on the arrow.

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The report will then appear in the user's Inbox.

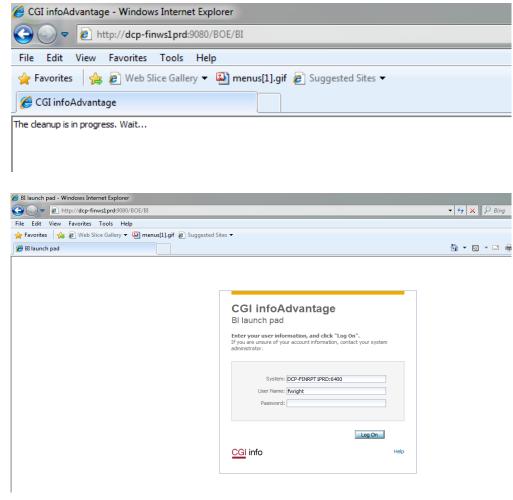
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Log off WEBI

When you are done using WEBI, you must click the Log Off link. Do not just close the window. If you close the window without clicking the Log Off link, you are still logged on.

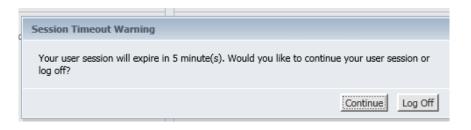


After clicking the link, you will receive a message that you are being logged off and afterward will be returned to the log in screen. You can then close the window.

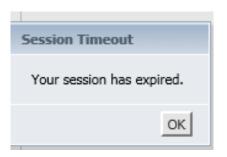


Common Problems

You will receive a message regarding inactivity before the system automatically logs you out.



If you do not click Continue after 5 minutes, the system will log you off.



If you receive this message, there may be no data to retrieve based on your conditions. For example, if you're running a query on Pending CRs, but there aren't any. Your Query Filters might also be incorrect. For instance, you used Unit g201, but it should be G201or Doc Code as Rqs instead of RQS.

