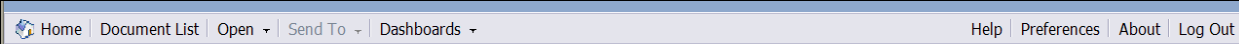




## WebIntelligence XI 3.5: Report Reader Quick Guide

For assistance, call 862-4242 or submit a request online at <https://itsupport.unh.edu/webi/>

<b>Supported Software</b>	For supported software versions for WebI (like browsers), see: <a href="http://www.usnhgateway.org/images/ets_support_matrix.JPG">http://www.usnhgateway.org/images/ets_support_matrix.JPG</a>
<b>Log In</b>	<ul style="list-style-type: none"> <li>• Open Internet Explorer and go to <a href="http://www.usnhgateway.org">http://www.usnhgateway.org</a>.</li> <li>• If Junos Pulse VPN is not installed, click the link at “Access new Connect VPN <b>Here</b>” to install. If installed, it should prompt you to log in at start-up or you can open it to log in. Log in to Junos (same as AD account).</li> <li>• Click the “Gateway Quick Links” menu and choose <b>Access WebIntelligence</b>.</li> <li>• In the <b>User Name</b> box, enter your WebI username. Usernames are not case-sensitive.</li> <li>• In the <b>Password</b> box, enter your password and click <b>OK</b>. Passwords are case-sensitive.</li> </ul>
<b>Navigation Bar</b>	Access the top navigation bar from any WebI page: 
<b>Document List</b>	From the top navigation bar, select <b>Document List</b> to access Public Folders, My Favorites and Inbox. Folders and reports you can see depend on your account security. Published reports are organized in Public Folders. You may create folders in My Favorites to file Personal reports.
<b>Preferences</b>	<p>From the top navigation bar, select <b>Preferences</b> to change start page, views and other preferences. To Save changes, click <b>OK</b> at the bottom left corner.</p> <p><b>Recommended Settings:</b></p> <ul style="list-style-type: none"> <li>• InfoView Start page - Set to Favorites</li> <li>• Document Navigation View – Set to Folder</li> <li>• Max Objects - Set to 30 (this is the number of reports that appear in the report list). Use the Delete key rather than Backspace key in this box; Backspace takes you out of the Preferences screen.</li> <li>• Document List Display – Uncheck all boxes</li> </ul> <p>Change Password – if you need to change your password, use a strong password with a min of 7 chars. You may not repeat the last 3 passwords used and at least 5 min is needed between change attempts.</p>
<b>Open Reports</b>	Double-click a report name to open. It is normal for the report to be empty before refreshing it, if opened from a Public Folder. To view report descriptions on the Document List screen, select a report, choose the <b>Open</b> menu and choose <b>Encyclopedia</b> ; select a report from the list and its description appears in the left pane.
<b>Refresh Reports</b>	<p>If the User Prompt Input pane is not visible on the left, click the <b>User Prompt Input</b> icon in the lower left. If you know the responses and formats needed, type responses and tab between prompts. Select <b>Run</b> to run the report (may appear grayed out but will launch the query).</p>  <p>To use a list of values for (most) prompts, click <b>Advanced</b>, or click <b>Refresh Data</b> in top right to get the Prompts dialog box. After making selections, double-click or use right arrow to move selections to the right. A green check appears beside completed prompts. Select <b>Run Query</b> to run the report (may need to scroll to see Run Query).</p> <p>The search feature in the Advanced prompts box lets you to narrow a long list of values (Example: UC* for orgs or KIN* for majors). Asterisk (*) is the wildcard. Click <b>Refresh Values</b> to restore a complete list after searching.</p>
<b>Close Reports</b>	Click the <b>Close</b> icon at the top right corner of the screen to close a document: 
<b>Save a Report to Favorites</b>	<ul style="list-style-type: none"> <li>• With a report open, choose <b>Save as</b> from the Document drop-down list. To save with data, refresh first. <i>(If you cannot see the Document drop-down list, click <b>View in HTML Mode</b>)</i></li> <li>• Edit name or description if needed, and click <b>OK</b>. It is now available in the selected My Favorites folder.</li> </ul>

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<b>Save Reports as Excel, PDF or CSV</b>	<ul style="list-style-type: none"> <li>• Open and refresh a document.</li> <li>• Hold the <b>CTRL key</b> during <u>all of the following steps</u> so browser settings do not block the save process.</li> <li>• From the Document menu, select <b>Save to my computer as</b> to save all tabs of a report, or <b>Save report to my computer as</b> to save the selected report tab only. Choose a file type.</li> <li>• Choose <b>Save</b> or <b>Open</b> from the file download box.</li> </ul>
<b>Create a Favorites Folder</b>	<ul style="list-style-type: none"> <li>• Highlight <b>My Favorites</b> and right-click.</li> <li>• Select <b>New</b> and then <b>Folder</b>. Enter the new folder name and click <b>OK</b> to save.</li> </ul>
<b>Move Multiple Reports to Favorites</b>	<ul style="list-style-type: none"> <li>• Highlight reports to move, such as from your Inbox. To select more than one, hold the <b>Ctrl</b> key while clicking.</li> <li>• Right-click and choose <b>Organize</b> and then choose <b>Cut</b>.</li> <li>• Highlight a My Favorites folder on the left.</li> <li>• Right-click and choose <b>Organize</b> and then choose <b>Paste</b>.</li> </ul>
<b>Create Report Shortcuts</b>	<p>You may want to save shortcuts for frequently-used reports in a My Favorites folder. Shortcuts are pointers to the original report, so changes to the original are reflected when you access it using a shortcut.</p> <p>To save a report as a shortcut:</p> <ul style="list-style-type: none"> <li>• Highlight a report and right-click it. Choose <b>Organize</b>, and then <b>Create Shortcut</b>.</li> <li>• Highlight a My Favorites folder on the left and right-click it. Choose <b>Organize</b>, and then <b>Paste Shortcut</b>.</li> </ul>
<b>Send Reports</b>	<p>You can only send reports within Webl to other Webl users. To send a report with saved data, you must first save it to My Favorites before following the steps below.</p> <ul style="list-style-type: none"> <li>• Open a report, choose <b>Send To</b> from the top navigation bar and choose <b>Business Objects Inbox</b>.</li> <li>• <i>Uncheck</i> the box next to <b>Use Default Settings</b>.</li> <li>• Search for recipient by their Webl username.</li> <li>• Under the <b>Available</b> box, click recipient and use the right arrow to move to <b>Selected</b> box. Repeat for each recipient to include.</li> <li>• Leave defaults for other choices, and click <b>Submit</b> to send.</li> </ul>
<b>Search</b>	To search for a report, enter part or all of the name in the <b>Search Title</b> box and click the magnifying glass icon
<b>Printing</b>	<p>PDF is the best view for printing. To print all report tabs, select <b>PDF Mode</b> from the View drop-down list, then click the Print icon on the Adobe toolbar.</p> <p><u>If you do not want to print all report tabs</u>, do one of the following:</p> <ol style="list-style-type: none"> <li>1) In the Print dialog box Print Range section, change to "Pages" and specify a page range (determine which to include by navigating around the report using bookmarks on the left)</li> <li>2) While on the report tab to print, hold the <b>CTRL key</b> (to bypass browser interference), choose the <b>Document</b> menu, choose <b>Save report to my computer as &gt; PDF</b>. Keep holding <b>CTRL</b> and click <b>Open</b> in the dialog box to open the current tab in a new Acrobat instance for printing.</li> <li>3) If in PDF view, click <b>View in HTML format</b>, click the <b>View</b> menu, and choose <b>Draft mode</b>. Click <b>CTRL+A</b> to select all content and click <b>CTRL+C</b> to copy. Open a program like Excel and click <b>CTRL+V</b> to paste. This option is best for shorter tabs.</li> </ol>
<b>Delete Reports or Folders</b>	<ul style="list-style-type: none"> <li>• Highlight the folder or report you want to delete, then right-click it</li> <li>• Choose <b>Organize</b>, and then <b>Delete</b>. Click <b>OK</b> to confirm or <b>Cancel</b> to close without deleting.</li> <li>• You can only delete folders &amp; reports in My Favorites or Inbox.</li> </ul>
<b>Inbox</b>	From Document List, click <b>Inbox</b> to access reports sent to you. If you do not see an expected report, click <b>Refresh</b> .
<b>Log Out</b>	Click <b>Logout</b> from the top navigation bar when you have completed your session.