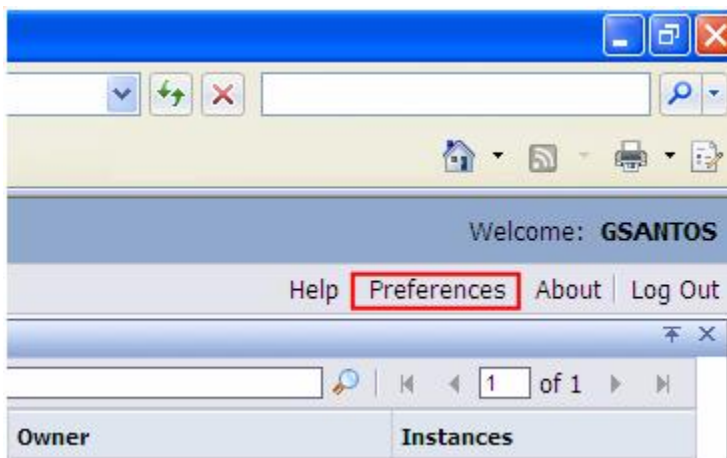


# BO Query Creation Guide

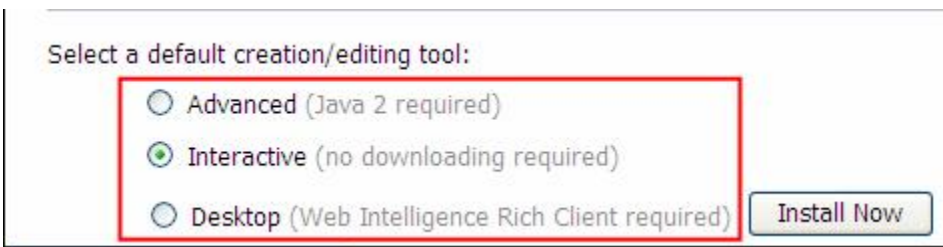
- [How to change your editing tool?](#)
- [How to enable Interactive Mode?](#)
- [How to create a new query?](#)
- [How to modify a new query?](#)
- [How to enable Rich Client Mode?](#)
- [How to access Rich Client Mode?](#)
- [How to import a report on Rich Client Mode?](#)
- [How to export to server?](#)
- [How to create a folder?](#)
- [How to refresh open?](#)
- [How to create alerts?](#)
- [How to apply a ranking?](#)

## How to change your editing tool?

1. Click on preferences button (see below)



2. Select Web Intelligence tab and look for the options below.

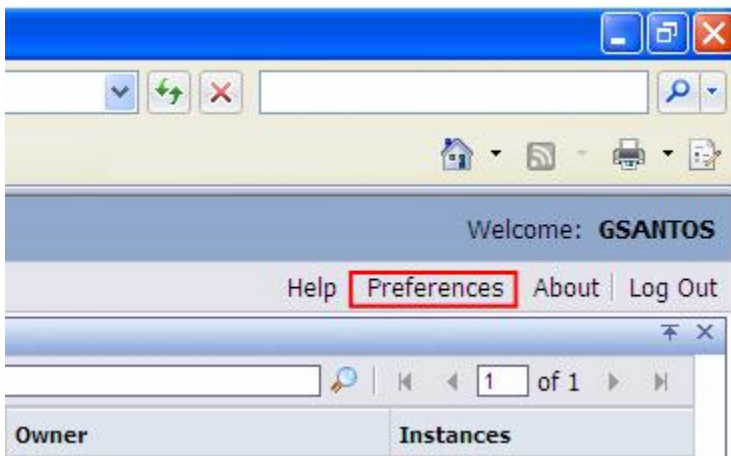


Obs<sup>1</sup>: In order to use the Advanced Interface JVM

Obs<sup>2</sup>: In order to use the Desktop Interface its necessary to install Web Intelligence Rich Client Tool

## How to enable Interactive Mode?

1. Click on preferences button



2. Select Web Intelligence tab and look for the options below. Set as indicated

Select a default view format:

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

When viewing a document:

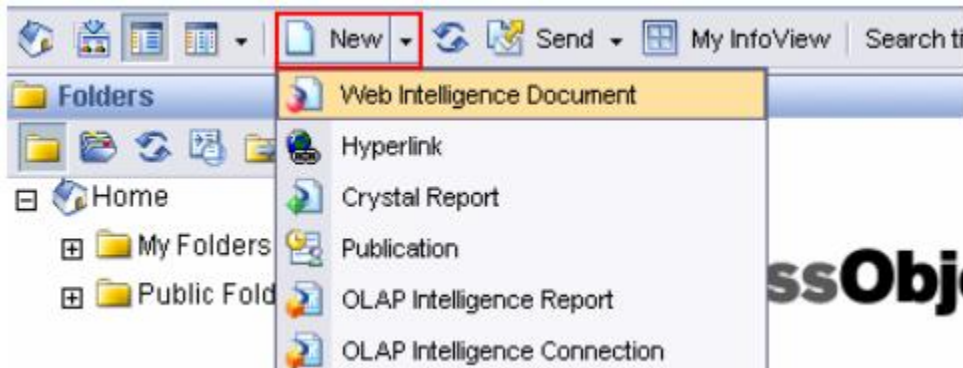
- ☐ Use the document locale to format the data
- ☒ Use my preferred viewing locale to format the data

Select a default creation/editing tool:

- ☐ Advanced (Java 2 required)
- ☒ Interactive (no downloading required)
- ☐ Desktop (Web Intelligence Rich Client required)

## How to create a new query?

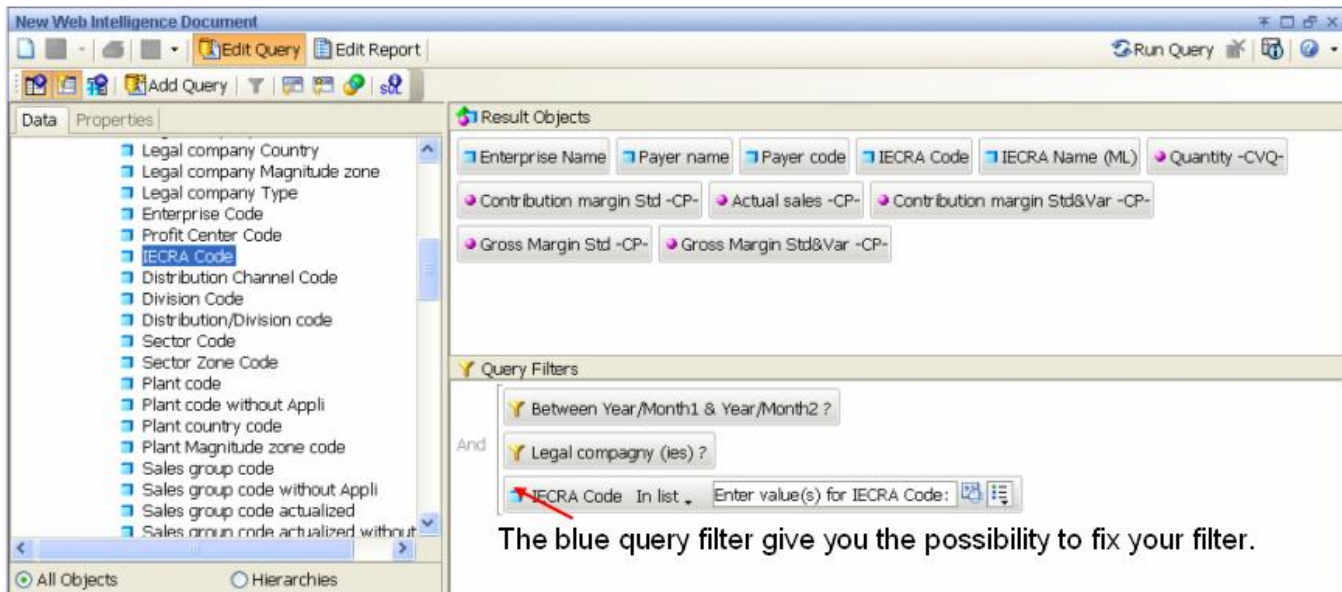
1. In the first screen after log-in, click on **New**:



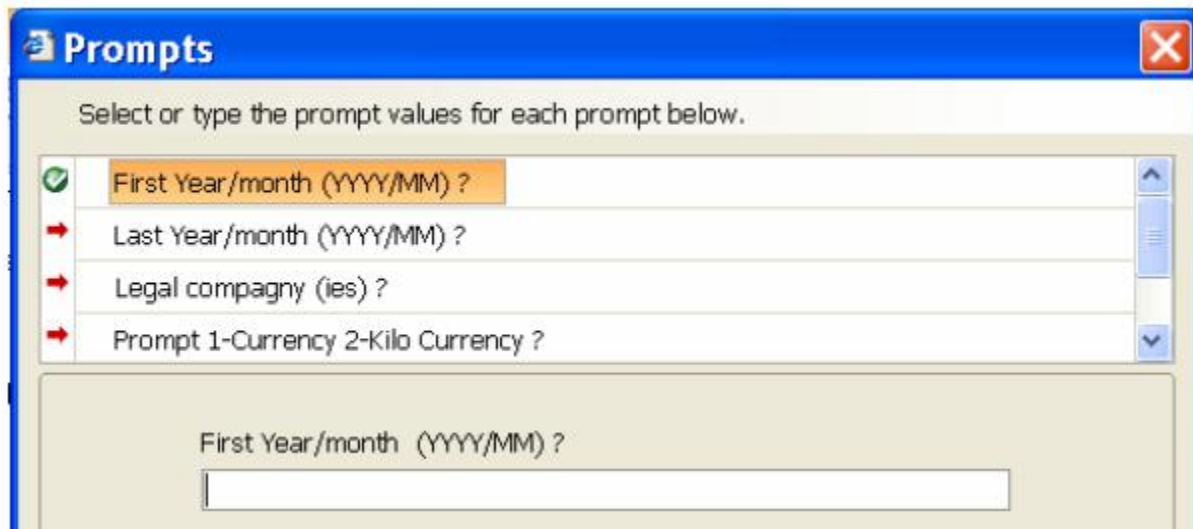
2. Chose the **Univers**

|                                                                                   |                            |               |               |
|-----------------------------------------------------------------------------------|----------------------------|---------------|---------------|
|  | GL_MB_E --PPE              | Administrator | /PremierSales |
|  | PP_C1_E --PPS Consolidated | Administrator | /PremierSales |
|  | PP_F1_E --PPS              | Administrator | /PremierSales |

3. Chose and drag and drop your objects in the Result objects and query filters boxes.

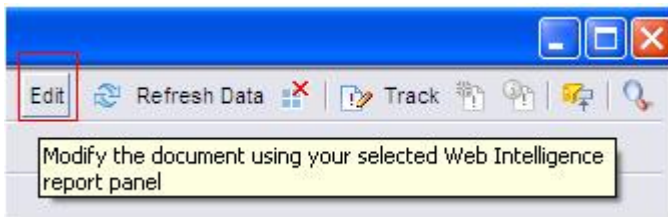


4. Moment to refresh you data... and it is done.

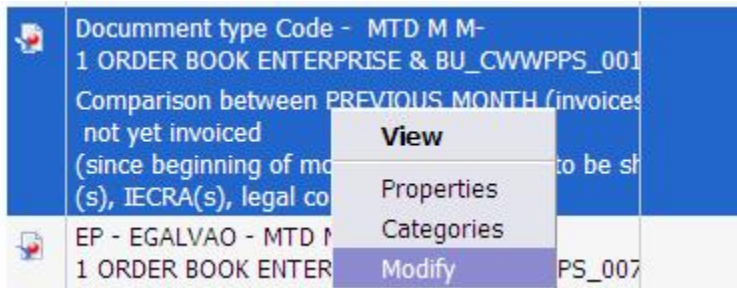


## How to modify a new query?

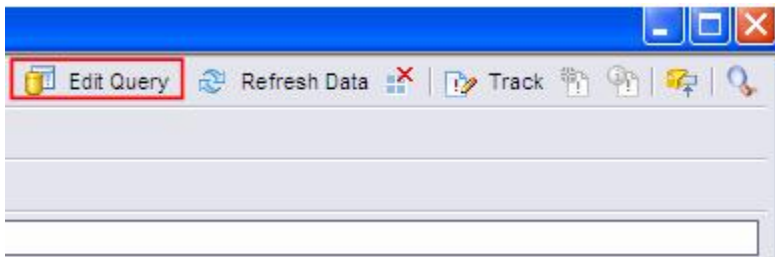
1a.From the report menu click on the edit button



1b. From BO XI Infocview

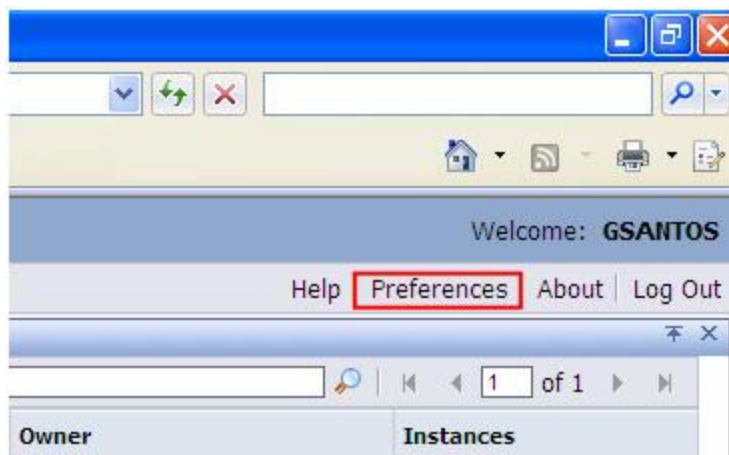


2. Click on Edit Query button on the top right menu



## How to enable Rich Client Mode?

1. Click on the Preferences Button



2. Select Web Intelligence tab and look for the options below. Set as indicated

Select a default creation/editing tool:

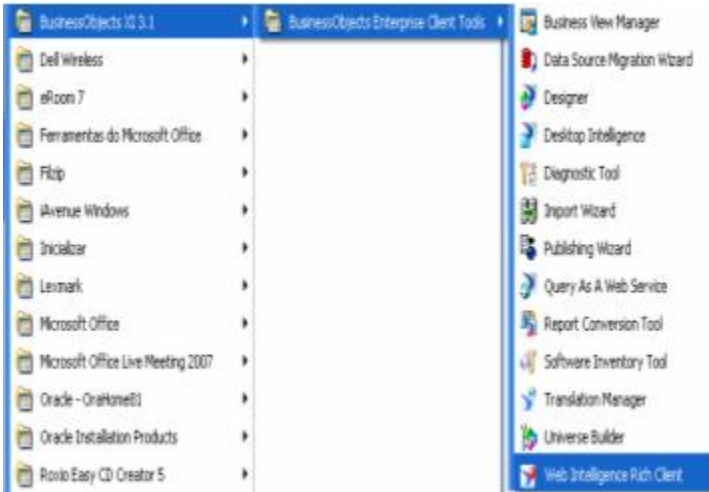
☐ Advanced (Java 2 required)

☐ Interactive (no downloading required)

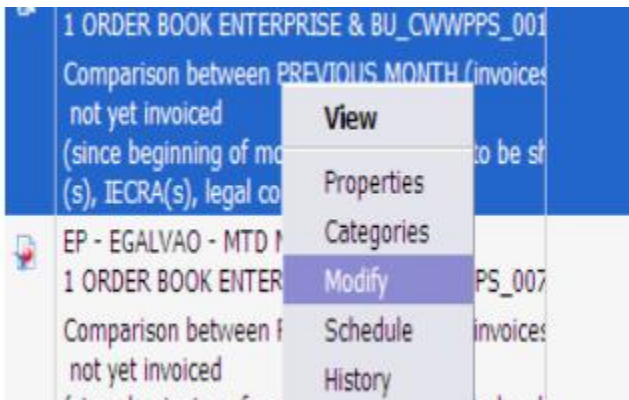
☒ Desktop (Web Intelligence Rich Client required) Install Now

## How to access Rich Client Mode?

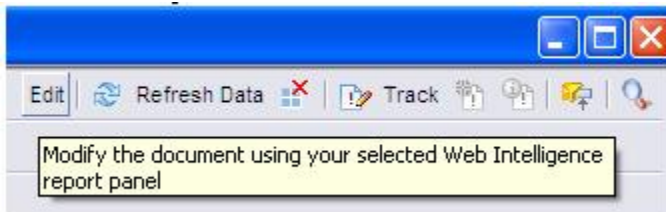
- From Start Menu



- From BO XI Infoview

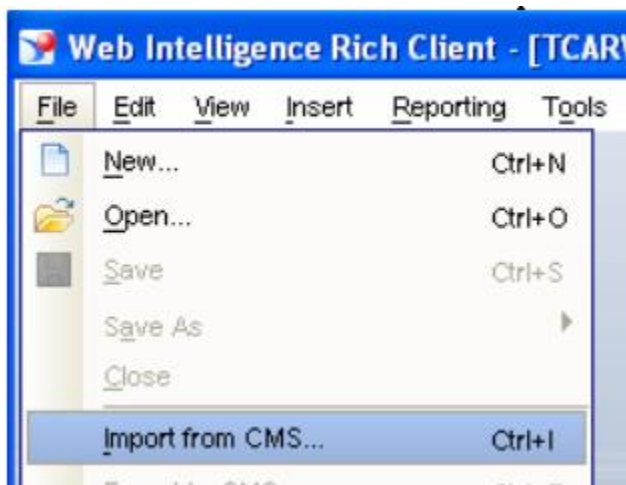


- From the report menu click on the edit button

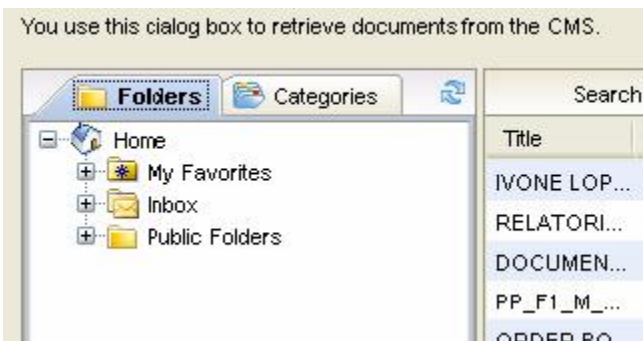


## How to import a report on Rich Client Mode?

1. Click on Menu -> File -> Import from CMS



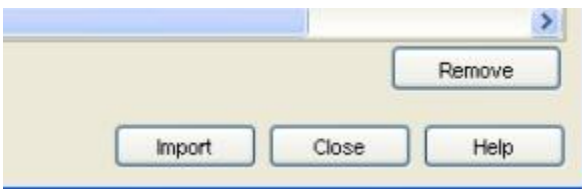
2. Browse for the report on public or favorites folder



3. Click on add



4. Click on Import

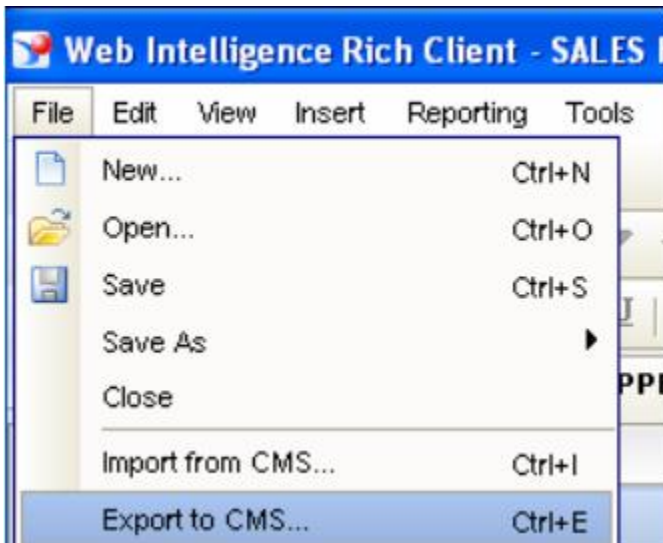


5. Click on Open All

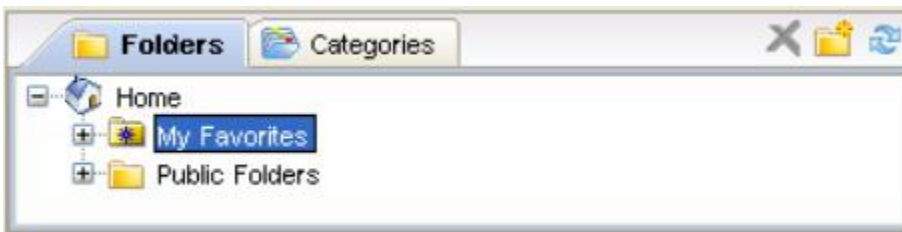


## How to export to server?

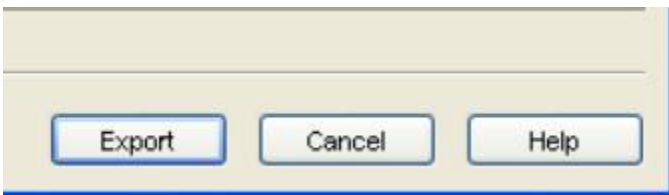
1. Choose at the Menu -> File -> Export to CMS option



2. Select the folder you want to export it

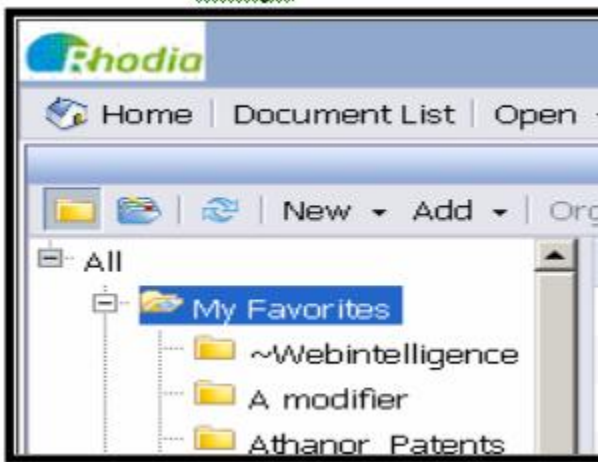


3. Click on Export

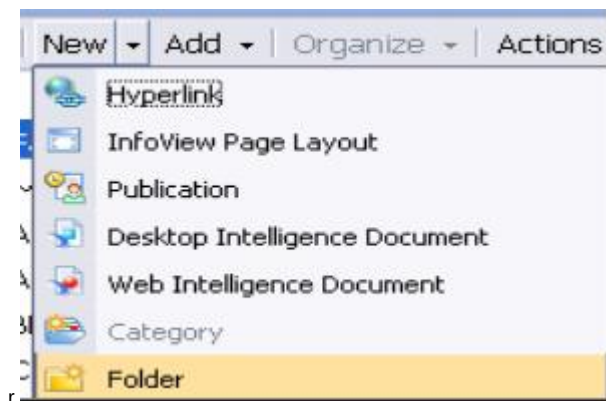


## How to create a folder?

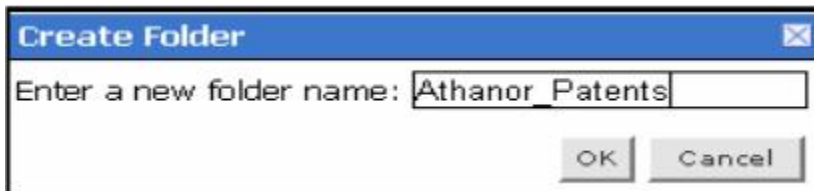
1. Select My favorites so that the action button named **New** is active



2. Click on New and choose the option folder



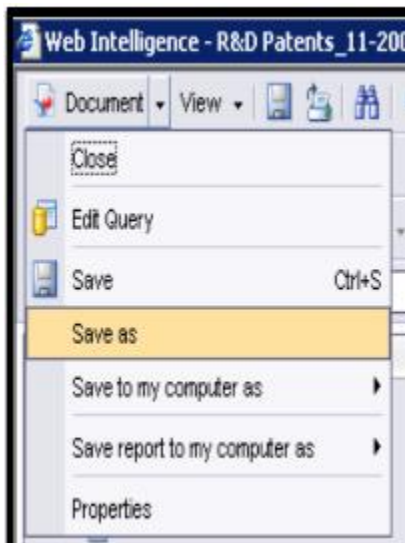
3. Give a name to this new folder Click on Ok



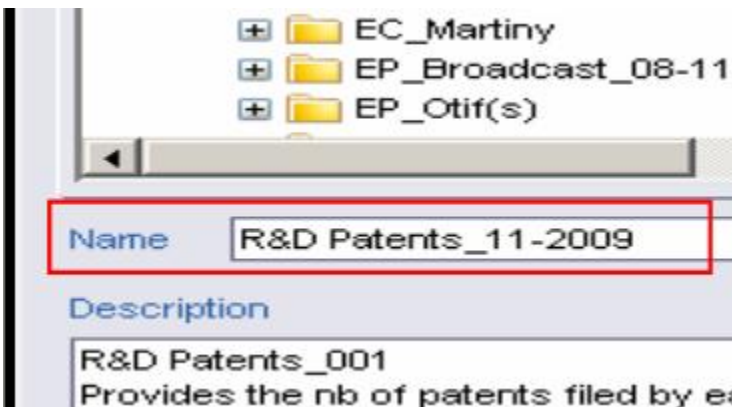
4. Click again on Favorites folder to see the folder created.

## How to refresh open?

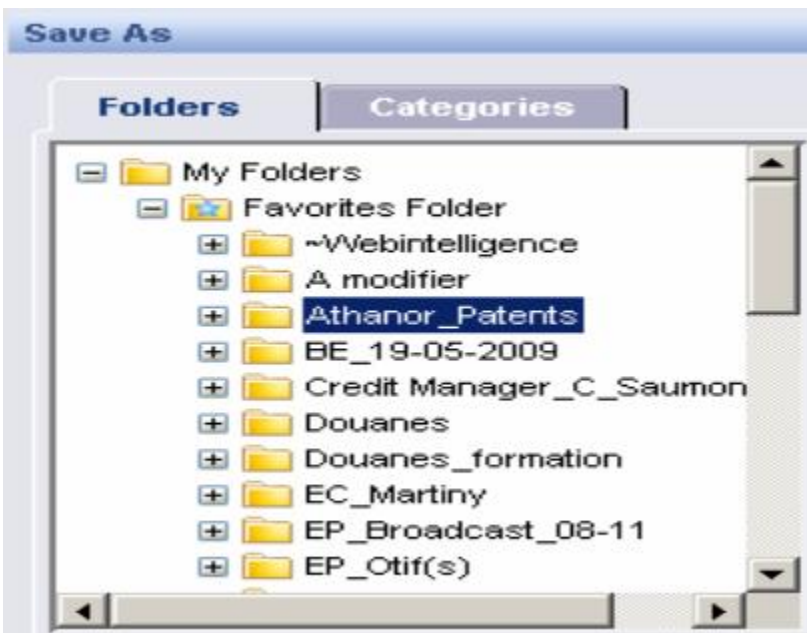
Note: This operation is only possible when you save the query, via a select, in the toolbar, of Document\Save as



1. Give a title



2. Select the path where the query has to be stored



3. Active the **Refresh on open** option

Keywords

  
☐ Permanent regional formatting  
☐ Refresh on open

4. Validate your choice by OK

Keywords

  
☐ Permanent regional formatting  
☐ Refresh on open

OK

Cancel

How to create alerts?

- 1 Inside an report , click on the source column of the table
- 2 Click on  in the tool bar
- 3 Click on new

**Alerters**

Create, edit, delete, activate or deactivate alerters.

Available Alerters

[No value]

3 New Edit Duplic... Remove

OK Cancel Help

**Alerter Editor**

Alerter name:

Description:

**Sub-Alerter**

| Filtered object or ... | Operator | Operand(s)   |
|------------------------|----------|--------------|
| Quantity -CVQ-         | Equal to | Type a value |

If the above is true, then display:

☐ Formula

- 4 Give an alerter name, the description and choose the formula.

How to apply a ranking?

- 1 Inside an report, click on  after have chosen the column
- 2 Make your choice and press OK

**Rank**

You can display the top/bottom values for the section/block based on the measure you select

**Ranking properties**

☒ Top

☐ Bottom

Based on  ☐ For each

Calculation mode  (Keep the top/bottom n values)