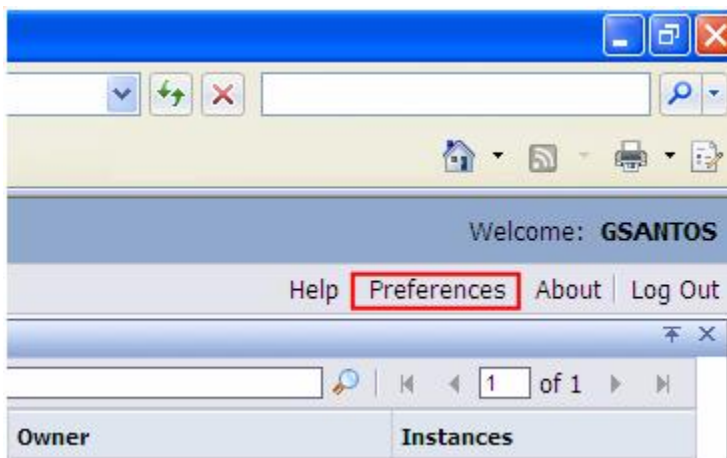


BO Query Creation Guide

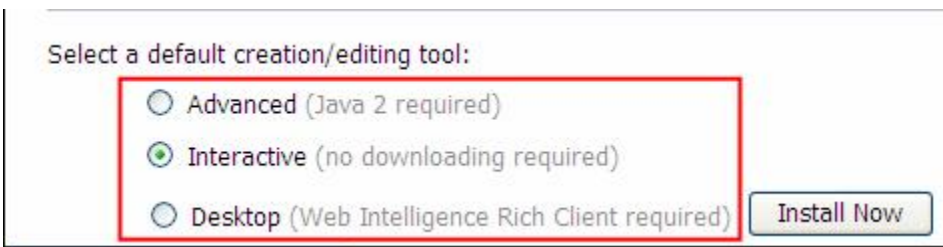
- [How to change your editing tool?](#)
- [How to enable Interactive Mode?](#)
- [How to create a new query?](#)
- [How to modify a new query?](#)
- [How to enable Rich Client Mode?](#)
- [How to access Rich Client Mode?](#)
- [How to import a report on Rich Client Mode?](#)
- [How to export to server?](#)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

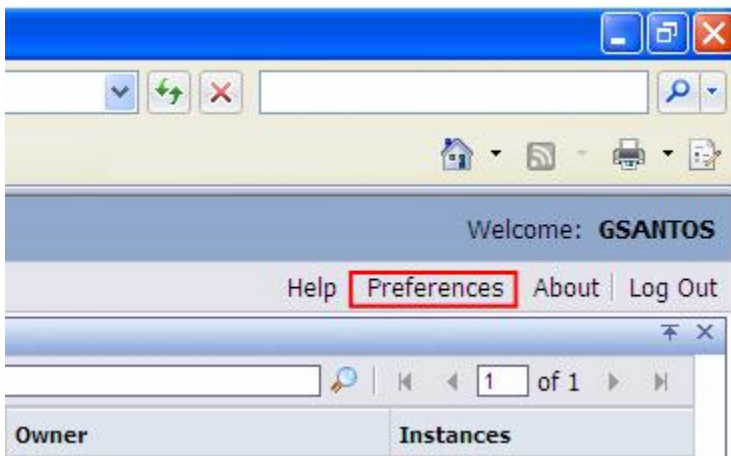


Obs¹: In order to use the Advanced Interface JVM

Obs²: 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:

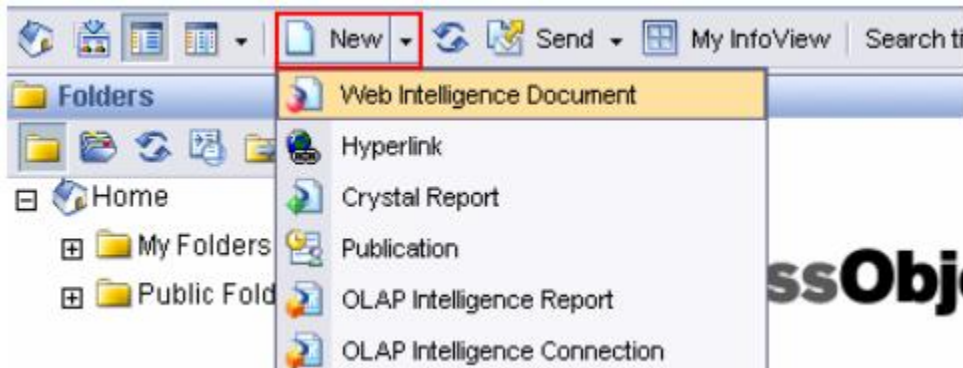
- ☐ Use the document locale to format the data
- ☒ Use my preferred viewing locale to format the data

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?

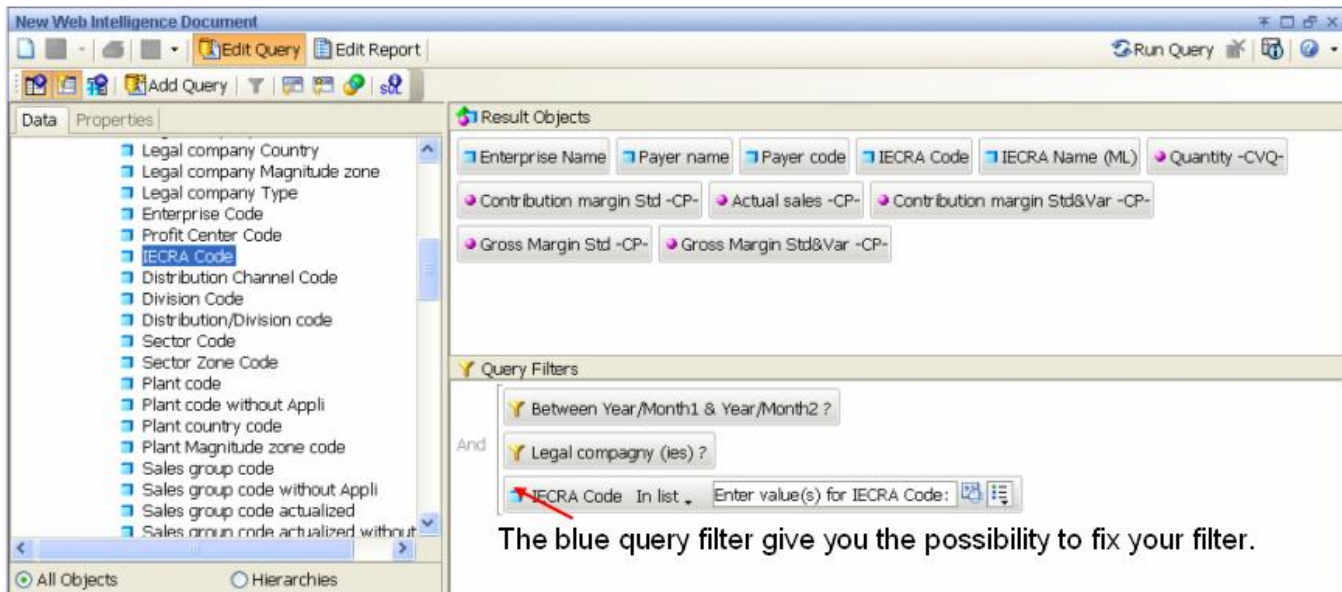
1. In the first screen after log-in, click on **New**:



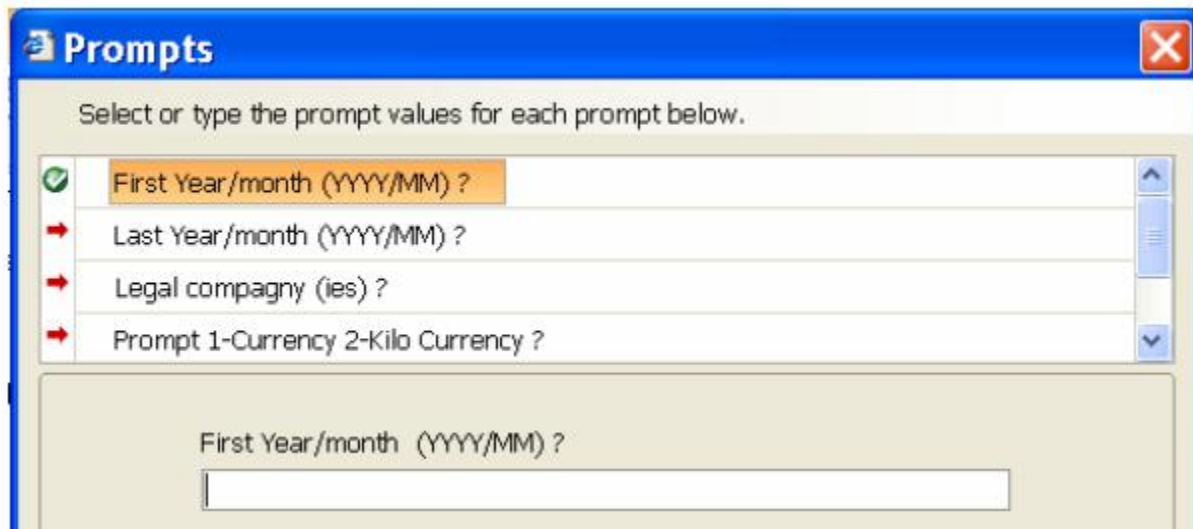
2. Chose the **Univers**

	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.

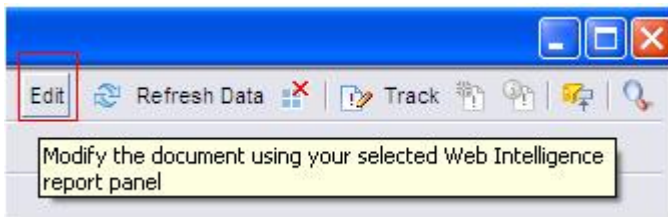


4. Moment to refresh you data... and it is done.

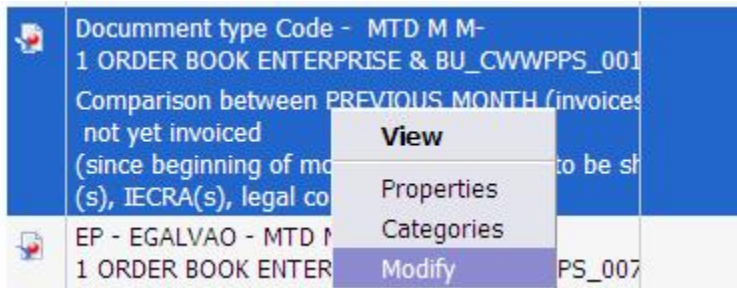


How to modify a new query?

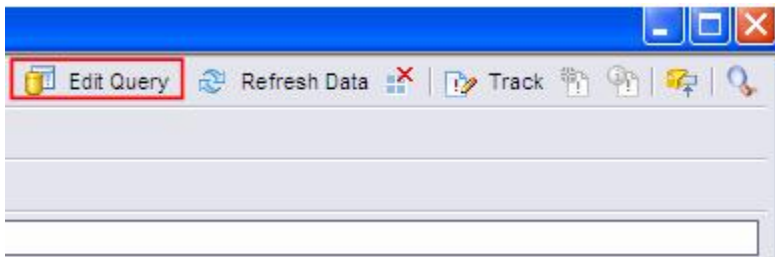
1a.From the report menu click on the edit button



1b. From BO XI Infocview

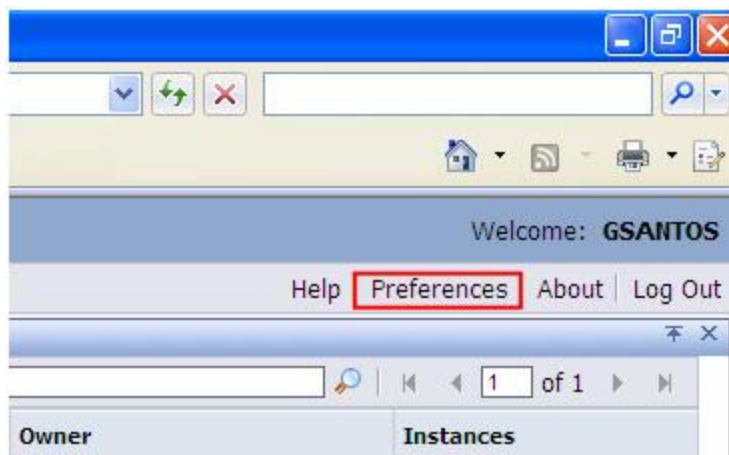


2. Click on Edit Query button on the top right menu



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:

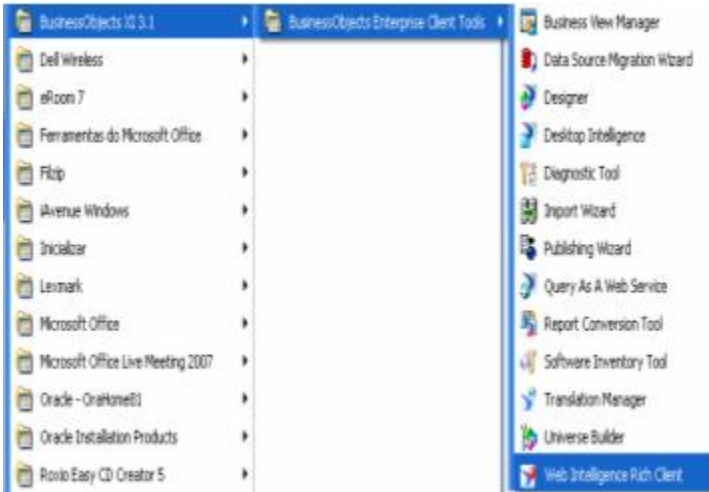
☐ Advanced (Java 2 required)

☐ Interactive (no downloading required)

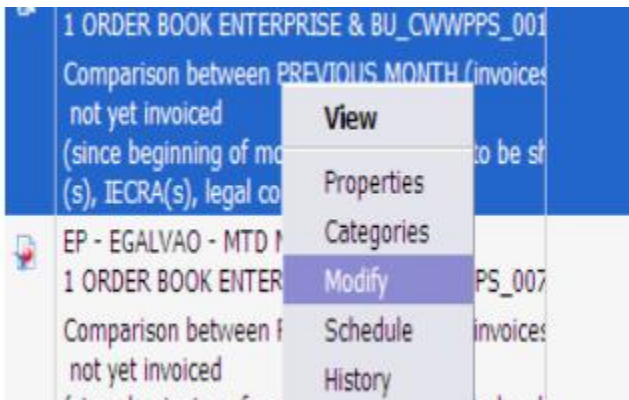
☒ Desktop (Web Intelligence Rich Client required) Install Now

How to access Rich Client Mode?

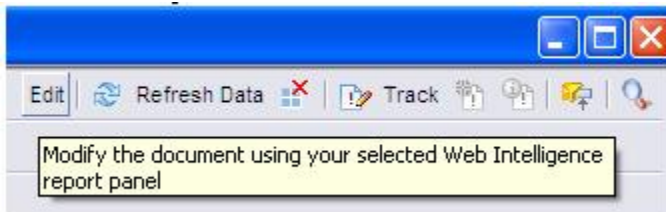
- From Start Menu



- From BO XI Infoview

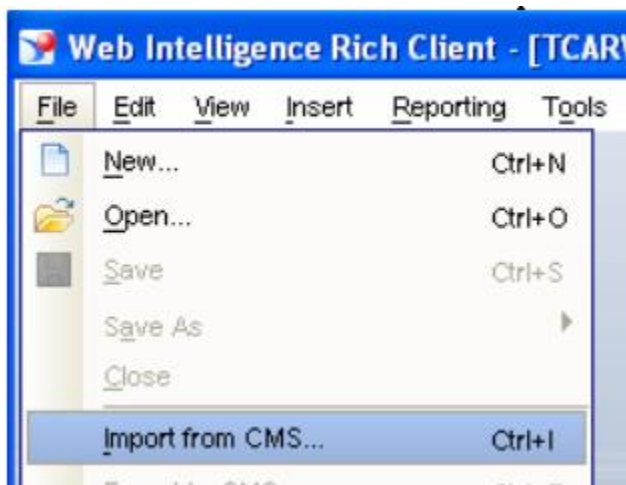


- From the report menu click on the edit button

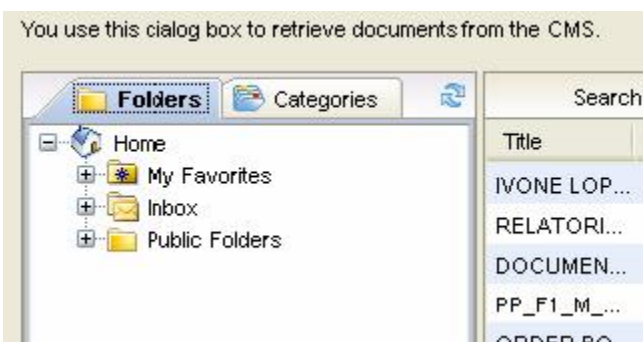


How to import a report on Rich Client Mode?

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



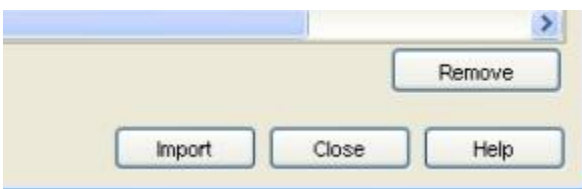
2. Browse for the report on public or favorites folder



3. Click on add



4. Click on Import

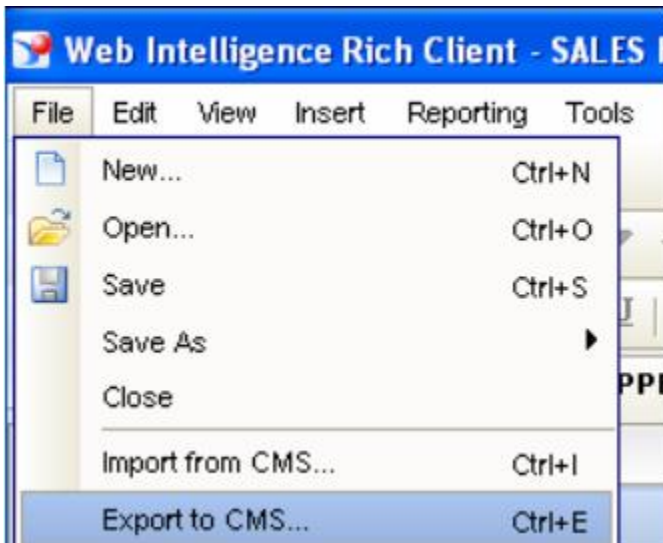


5. Click on Open All

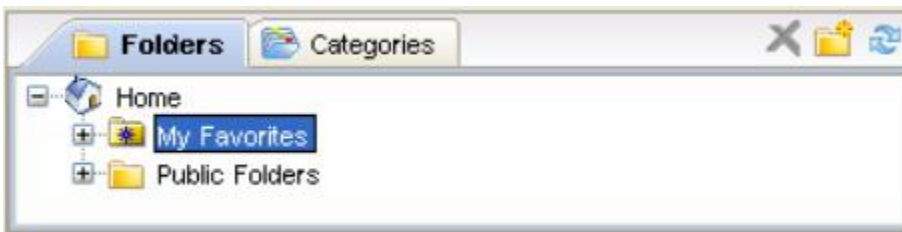


How to export to server?

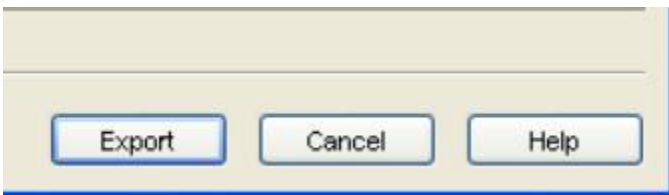
1. Choose at the Menu -> File -> Export to CMS option



2. Select the folder you want to export it

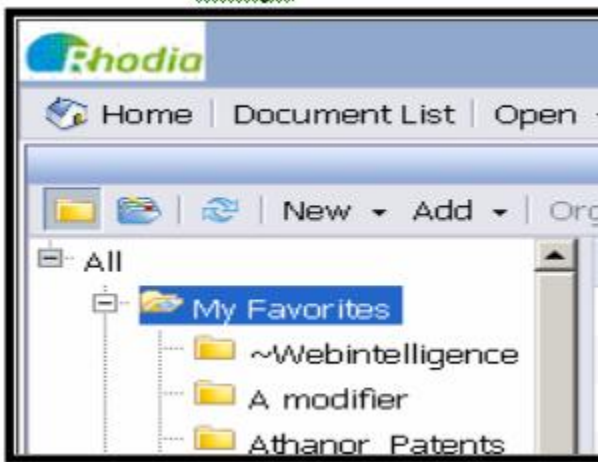


3. Click on Export

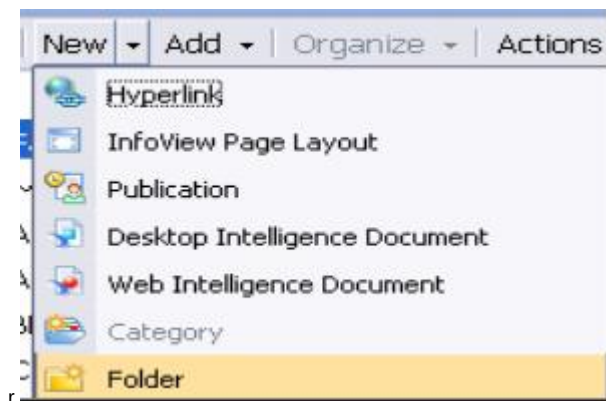


How to create a folder?

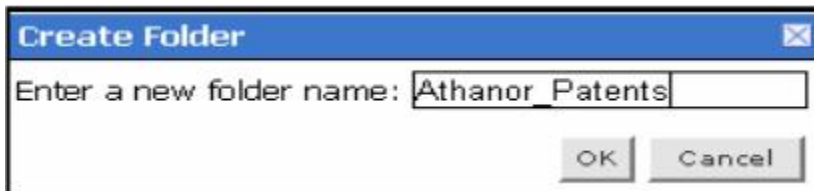
1. Select My favorites so that the action button named **New** is active



2. Click on New and choose the option folder



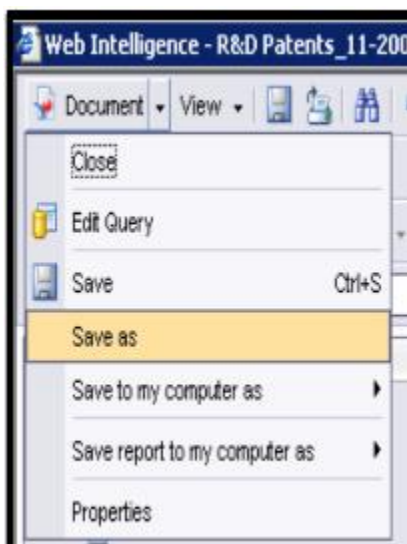
3. Give a name to this new folder Click on Ok



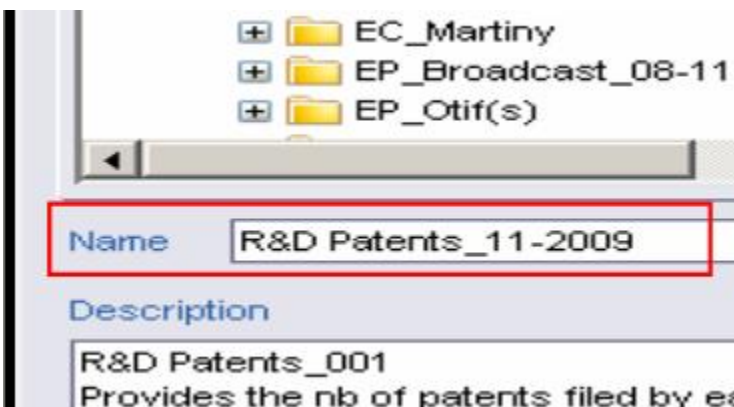
4. Click again on Favorites folder to see the folder created.

How to refresh open?

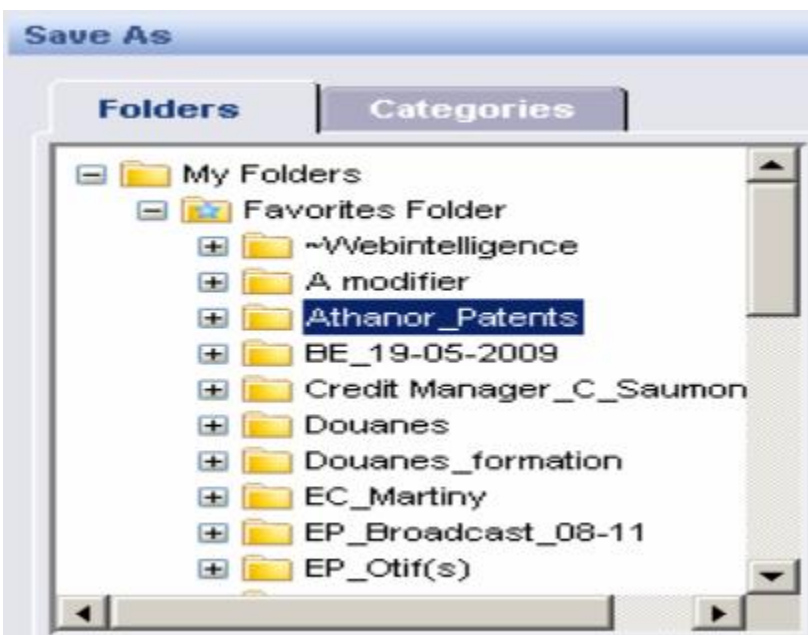
Note: This operation is only possible when you save the query, via a select, in the toolbar, of Document\Save as



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: Alerter

Description:

Sub-Alerter

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

If the above is true, then display: Cell contents Format ...

Add Sub-Alerter Remove Sub-Alerter ☐ Formula

OK Cancel Help

- 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 3

☐ Bottom

Based on [Quantity -CVQ-] ☐ For each

Calculation mode Count (Keep the top/bottom n values)

OK Cancel Help