Expense Assignment System, Version IV (EAS IV) Repository Functional User's Guide

105-03-001

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EAS IV REPOSITORY FUNCTIONAL USER'S GUIDE (DRAFT)

REVISION HISTORY PAGE

Version Number	Revision Summary	Date
105-03-001	EAS IV 2.4.0.0 Version, with Business Objects 5.1.5 Upgrade.	May 2003

EAS IV REPOSITORY FUNCTIONAL USER'S GUIDE (DRAFT)

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EAS IV REPOSITORY FUNCTIONAL USER'S GUIDE (DRAFT)

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UNIT 1
OVERVIEW

Introduction

In this unit, you will learn about the Expense Assignment System, Version IV (EAS IV) Repository, its background, and how and why it functions.

Unit Objective

Upon completion of this unit, you will be able to describe the EAS IV Repository.

In this Unit

This unit includes the following lesson:

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LESSON A
THE EAS IV REPOSITORY DESCRIPTION

Overview

Introduction

In this lesson, you will learn about the EAS IV Repository, its environment, and its data load process.

Lesson Objective

Upon completion of this lesson, you will be able to do the following:

- Describe the EAS IV Repository
- Describe the EAS IV Repository environment
- Describe the EAS IV Repository data transfer and load process

Order of Topics

This lesson includes the following topics:

The EAS IV Repository

Introduction

In this topic, you will learn about the EAS IV Repository.

Description

The EAS IV Repository provides the ability to query Medical Expense and Performance Reporting System (MEPRS) data in detailed and aggregated form and to formulate the data into a variety of reports. MEPRS data, which originate from EAS IV at each Department of Defense (DoD) medical treatment facility (MTF) and dental treatment facility (DTF), consist mainly of MTF and DTF financial, workload, and personnel information.

The EAS IV Repository replaces the functionality of MEPRS Executive Query System, Version III (MEQS III). MEQS III used MEPRS data from Expense Assignment System, Version III (EAS III) to create query and reporting capability similar to the EAS IV Repository. In an effort to update technology and maintain compatibility, the EAS IV Repository is replacing MEQS III.

The EAS IV Repository Environment

Introduction

In this topic, you will learn about the EAS IV Repository environment.

Description

The EAS IV Business Objects Repository resides on a Microsoft Windows NT client/server system. Utilizing Informix databases, which reside on a Hewlett-Packard UNIX (HP-UX) server and the Windows NT server, the EAS IV Repository is accessed through user workstations using the Informix Client Connect, Version 9.1.4 or greater, connectivity software. Transmission Control Protocol/Internet Protocol (TCP/IP) allows Business Objects, a Windows-based graphical user interface (GUI) query tool, to access all EAS IV Repository data.

The HP-UX server with the Informix database stores all MEPRS data, which are received from MTFs and DTFs through an automated transfer and data load process. Instead of having an EAS IV Repository server onsite, MTFs and DTFs connect through TCP/IP to the HP-UX server.

Business Objects 5.1.5 is commercial off-the-shelf (COTS) software that resides on the client workstation and displays the data that are collected from the EAS IV Repository server and transferred by Informix Client Connect. In Business Objects 5.1.5, data are called objects, and objects are grouped into classes. Classes are grouped hierarchically to make up the EAS IV Repository universe.

The EAS IV Repository Database Load

Introduction

In this topic, you will learn about the EAS IV Repository database load.

Description

The EAS IV Repository server receives data directly from individual MTF and DTF EAS IV servers through the Transmission function. At the scheduled transmission time, allocated data are sent to the EAS IV Repository server. The server polls hourly to take in all received transmissions but then holds the transmissions until a nightly automated database load. The database load collects all the data and loads the data into the EAS IV Repository server.

Because there is no required date and time to transmit data, the EAS IV Repository can house new, updated data every day depending on when site personnel transmit their monthly data. The time the EAS IV Repository displays updated data also depends on the MTF's or DTF's time zone and location in relation to the server's time zone and location. For example, if a site in Japan transmits data at their local time close of business on Monday the first, the data misses the EAS IV Repository server data load because Japan is 14 hours ahead of Eastern Standard time (EST). By EST, the server would receive the Japan site data at 3 in the morning on Tuesday the second. The server would have already processed data for the first. Therefore, the Japan site data may not be available to the Japan site until the afternoon of the second or the morning of the third.

Because of the nature of MEPRS data, a large volume of server storage space is required to hold the data from Transmission jobs and EAS IV Repository query and report data. Therefore, query and report information is housed on a Windows NT server, and the database is housed on an HP-UX server. The Informix client connectivity software connects an MTF or DTF workstation to the Windows NT server, and then it connects to the HP-UX server if database data are requested. In addition, data from Broadcast Agent, a report transmission scheduling function, are housed on a second Windows NT server. See unit 9 for more information about Broadcast Agent.

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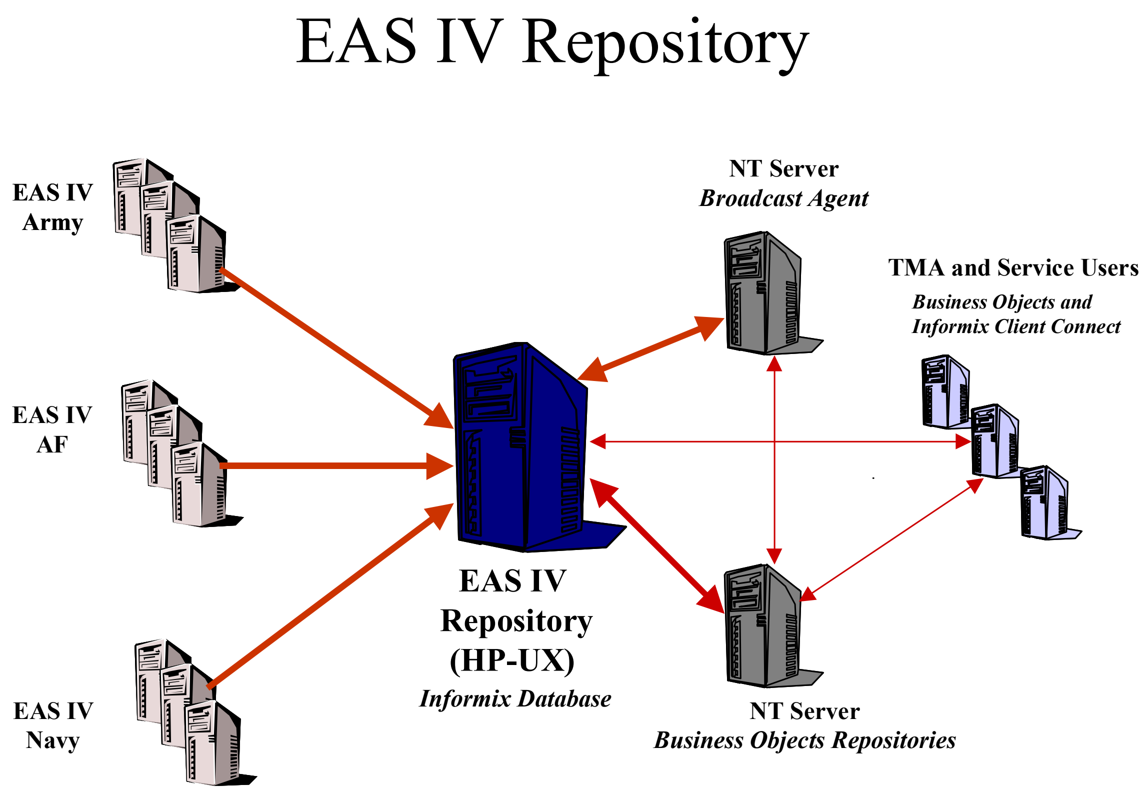
The EAS IV Repository Database Load, Continued

Description

The following diagram displays the flow of data in the EAS IV Repository:



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UNIT 2
THE EAS IV REPOSITORY UNIVERSE

Overview

Introduction

In this unit, you will learn about Business Objects 5.1.5 and the EAS IV Repository universe.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Describe Business Objects 5.1.5
- Describe the EAS IV Repository universe
- Describe the classes and objects in the EAS IV Repository universe

In This Unit

This unit includes the following lesson:

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LESSON A
THE EAS IV REPOSITORY AND BUSINESS OBJECTS 5.1.5

Introduction

In this lesson, you will learn about Business Objects 5.1.5 and how it relates to the EAS IV Repository.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe Business Objects 5.1.5
- Describe the relationship between Business Objects 5.1.5 and the EAS IV Repository
- Describe the EAS IV Repository Universe
- Describe the EAS IV Repository Universe classes and objects

Order of Topics

This lesson includes the following topics:

What is Business Objects 5.1.5?

Introduction

In this topic, you will learn about Business Objects 5.1.5.

Definition

Business Objects 5.1.5 is a Windows GUI COTS software application, created to provide query and reporting capability for a variety of information.

Description

The EAS IV Repository uses Business Objects 5.1.5 to provide query and reporting capability for MEPRS data. Just as with MEQS III, the Business Objects software is merely a tool that enables the end-user to search through MEPRS data and format the data in a variety of meaningful ways that allow for data integrity checks and decision support.

Business Objects 5.1.5 is configured to house information hierarchically. All pieces of data are referred to as objects. Objects are then grouped logically into classes, and the classes are grouped into universes. For the purposes of the EAS IV Repository, there are 24 classes, 16 sub-classes, and 1 universe, the EAS IV Repository.

The EAS IV Repository Universe

Introduction

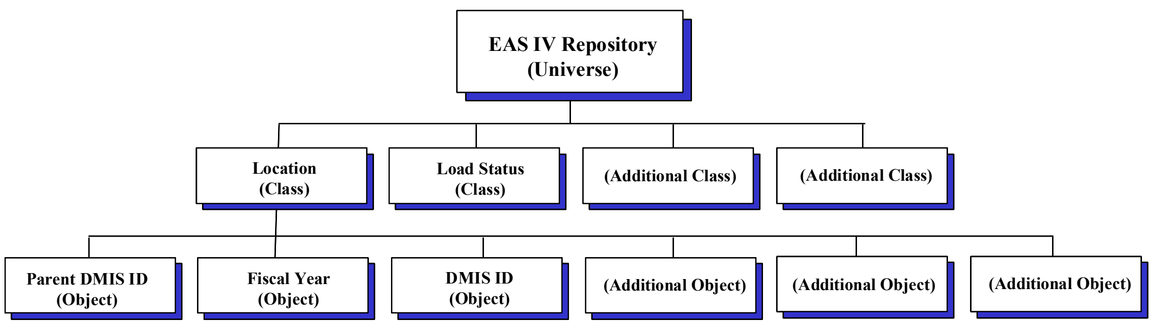
In this topic, you will learn about the EAS IV Repository universe.

Definition

In Business Objects, a universe is a total or partial representation of a relational database used for a particular application or group of users. For the EAS IV Repository, the universe represents access to the database with MEPRS data that come from EAS IV. The EAS IV Repository users access the data through the universe in Business Objects 5.1.5.

Universe Hierarchy

The following diagram displays a portion of the EAS IV Repository universe hierarchy:



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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects

The EAS IV Repository universe holds 24 classes and 16 sub-classes. Each class has its own objects, some of which are repeated from class to class, and others that are entirely individual. The following table lists the classes, the definition of the classes, and the objects within each class.

Class	Class Description	Objects in Class
01 Location	Contains DMIS facility information by Fiscal Year. The objects in this class relate to EAS IV MTFs and DTFs that transmit EAS IV data files	• Parent DMIS ID • Fiscal Year • DMIS ID • DMIS Name • Installation Name • Facility Type Code • Facility City • Facility Zip1 Code • Facility Zip2 Code • Facility Location Code • US Flag Code • Service Code • Service Description • Health Service Region • UIC • Regional Medical Code • Regional Medical Description • HSO Code • HSO Description • Major Command Code • Major Command Description

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
02 Load Status	Contains 12 months of information regarding the load date, job ID and job status of EAS IV Transmissions by DMIS ID and Fiscal Year	• Fiscal Year • Parent DMIS ID • Status 01 • Job ID 01 • Load Date 01 • Status 02 • Job ID 02 • Load Date 02 • Status 03 • Job ID 03 • Load Date 04 • Status 04 • Job ID 04 • Load Date 04 • Status 05 • Job ID 05 • Load Date 05 • Status 06 • Job ID 06 • Load Date 06 • Status 07 • Job ID 07 • Load Date 07 • Status 08 • Job ID 08

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
02 Load Status, Continued	Contains 12 months of information regarding the load date, job ID and job status of EAS IV Transmissions by DMIS ID and Fiscal Year	• Load Date 08 • Status 09 • Job ID 09 • Load Date 09 • Status 10 • Job ID 10 • Load Date 10 • Status 11 • Job ID 11 • Load Date 11 • Status 12 • Job ID 12 • Load Date 12
03 Rpting Components of Parent MTF	Contains the reporting hierarchy for first through third level FCCs	• Fiscal Year • 1st Level Functional Cost Code • 1st Level Functional Cost Code Desc • 2nd Level Functional Cost Code • 2nd Level Functional Cost Code Desc • 3rd Level Functional Cost Code • 3rd Level Functional Cost Code Desc • Cost Pool Indicator

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
04 Month	Contains hierarchical Fiscal and calendar month objects	• Fiscal Quarter • Calendar Month • Cal Month Mm • Fiscal Month • Month Abbreviation • Month Description
05 Common Expense Elements	Contains many DoD common expense elements	• Fiscal Year • DoD SEEC • DoD SEEC Description • DoD SEEC Category • DoD SEEC Category Description • Schedule Type Code • Fixed Cost Percent • DoD PEC • DoD PEC Description • DoD BSL Code • DoD BSL Description • SOF • SOF Description

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
06 Expense Detail	Contains expense accepted data	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Capitation Category • Capitation Description • Direct Expense Month Net • Direct Obligation Month Net • Purified Expense • Stepdown Expense Contributed • Stepdown Expense From D Accounts • Stepdown Expense From E Accounts

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
07 Personnel Detail	Contains personnel accepted data	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • Personnel Category • Personnel Category Description • Skill type Code • Skill type Code Description • Skill type Suffix Code Skill type Map Description • Duty Indicator • Duty Indicator Description • Service Occupation Code • Service Occupation Code Description • DoD Occupation Code • DoD Occupation Code Description • Capitation Category • Capitation Description

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
07 Personnel Detail, Continued	Contains personnel accepted data	• Assigned FTE • Available FTE • Nonavailable Leave FTE • Nonavailable Other FTE • Nonavailable Sick FTE • Purified Available FTE • Available Salary Expense • Nonavailable Salary Expense • Available Salary Expense • Nonavailable Salary Expense

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
08 Common Expense Allocation Keys	Contains data relative to commonly used expense allocation data	• Fiscal Year • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Expense Indicator • Expense Indicator Description • Skill type Code • Skill type Code Description • Providing DMIS ID • Providing 4th Level Functional Cost Code • Capitation Category • Capitation Description
09 Expense Allocated	Contains net month expense amounts received by FCCs during allocation	• Fiscal Month • Month Net Expense

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
10 Personnel Allocated	Contains the FTE data elements by personnel category, skill type, Service occupation, and duty indicator	• Fiscal Year • Fiscal Month • Personnel Category • Personnel Category Description • Skill type Code • Skill type Code Description • Skill type Suffix Code • Skill type Map Description • Duty Indicator • Duty Indicator Description • Service Unique Occupation Code • Service Occupation Code Description • DoD Occupation Code • DoD Occupation Code Description • Assigned FTE • Available FTE • Nonavailable Leave FTE • Nonavailable Other FTE • Nonavailable Sick FTE

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
11 Account Subset Definition	Contains the Account Subset Definition (ASD) table by Fiscal Year	• Fiscal Year • Parent DMIS ID • 4th Level Functional Cost Code • 4th Level Functional Cost Code Description • DMIS ID • 3rd Level Functional Cost Code • 3rd Level Functional Cost Code Description • Reporting Category • ASN • Data Set Identifier
12 Service Unit Cost	Contains summary-level expenses based on Service unit codes	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • DoD SEEC • Service Unit Code • Service Unit Code Description • Skill type Code • Skill type Code Description

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
12 Service Unit Cost, Continued	Contains summary-level expenses based on Service unit codes	• Statistical Amount • Direct Expense • Cost Pool • Expense From D Accounts • Expense From E Accounts • Total Expense
13 Patient Acuity	Contains data related to the severity of a patient's condition and to the level of nursing care required for the patient	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Patient Acuity Category • Patient Numbers • Nursing Hours

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
14 DRG Cost FCC	Contains DRG-related data, which compares demographic, diagnostic, and therapeutic characteristics per a patient's length of stay (LOS) and the amount of resources consumed. These data are used to credit inpatient workload and to allocate resources with the DoD Military Health System (MHS)	• Fiscal Year • Fiscal Month • Parent DMIS ID • DMIS ID • 3rd Level Functional Cost Code • DRG Code • Case Mix Index • FCC Average Length of Stay • FCC DRG RWP • FCC DRG Weight • FCC Total RWP • DRG Expense per Disposition • FCC Total DRG Expense • Inpatient Expense per Disposition • Prof Salaries per Disposition • FCC Total Disposition

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
15 Data Sets	Contains data related to an MTF's or DTF's data sets	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Providing DMIS ID • Beneficiary Category Code • Beneficiary Category Description • Data Set ID • Raw Statistical Amount • Weighted Statistical Amount

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
16 Expense Pure	Contains data related to pure financial expenses, which are non-allocated expenses	• Pure Record ID • Fiscal Year • Fiscal Month • Parent DMIS ID • DMIS ID • 4th Level Functional Cost Code • Obligation Fiscal Year • Service Code • Schedule Type Code • SUEE Code • Service Unique PEC • Service BSL Code • SOF • RC/CC • Expense YTD • Obligation YTD

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
17 Ambulatory CPT Workload	Contains data related to weighted ambulatory visits	• Fiscal Year • Parent DMIS ID • Fiscal Month • Providing DMIS ID • Providing 4th Level Functional Cost Code • Beneficiary Category Code • Beneficiary Category Description • CPT Code • CPT Modifier • CPT Code Type • CPT AMA Short Name • CPT DoD Name • CPT Weight • Raw Statistical Amount • Weighted Statistical Amount • Cost per Weighted Unit • Total Procedure Cost

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
18 Ancillary CPT Workload	Contains data related to weighted pharmacy, lab, and radiology procedures	• Fiscal Year • Parent DMIS ID • Fiscal Month • Providing DMIS ID • Providing 4th Level Functional Cost Code • Beneficiary Category Code • Beneficiary Category Description • CPT Code • CPT Modifier • CPT Code Type • CPT AMA Short Name • CPT DoD Name • CPT Weight • Raw Statistical Amount • Weighted Statistical Amount • Cost per Weighted Unit • Total Procedure Cost

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
19 Respiratory / Pulmonary Workload	Contains data related to weighted respiratory therapy and pulmonary function procedures	• Fiscal Year • Parent DMIS ID • Fiscal Month • Providing DMIS ID • Providing 4th Level Functional Cost Code • Beneficiary Category Code • Beneficiary Category Description • Resp / Pulmonary Procedure Code • Resp / Pulm Procedure Description • Resp / Pulm Procedure Weight • Raw Statistical Amount • Weighted Statistical Amount • Cost Per Weighted Unit • Total Procedure Cost

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
20 FCC Expense Summary	Contains a summary of all data by FCC	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Direct Care Prof Salary • Direct Clinician Salary • Direct Medical Supply Expense • Direct Other Expense • Direct Other Lab Expense • Indirect Anc Lab Expense • Indirect Anc Other Expense • Indirect Anc Supply Expense • Indirect Supply Expense • Indirect Supply Lab Expense • Indirect Supply Other Expense • Total Expense

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
21 FCC Summary	Contains a summary of all data by FCCs	• Fiscal Year • Fiscal Month • Parent DMIS ID • 4th Level Functional Cost Code • DMIS ID • 3rd Level Functional Cost Code • Admissions • Ancillary Procedures Count • Ancillary Weight Procedures • Assigned FTE • Available FTE • Dental Weight Procedures • Dispositions • Nonavailable Hosp FTE • Nonavailable Leave FTE • Nonavailable Other FTE • Nursing Patient Acuity • Occupied Bed Days • Outpatient Visits • Total Visits

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
21 FCC Summary, Continued	Contains a summary of all data by FCCs	• Administrative Clerical Salary • Clinical Salary • Direct Expense • Direct Obligations • Direct Care Professional Salary • Direct Care Paraprofessional Salary • Personnel Direct Expense • Purified Expense • Registered Nurse Salary • Stepdown Expense Contributed • Stepdown Expense From D • Stepdown Expense From E

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
22 Facility Summary	Contains a summary of data at the facility level	• Fiscal Year • Fiscal Month • Parent DMIS ID • Admissions • Assigned FTE A • Assigned FTE B • Assigned FTE C • Assigned FTE D • Assigned FTE E • Assigned FTE F • Assigned FTE G • Dispositions • Occupied Bed Days • Outpatient Visits • Tot Available FTE A • Tot Available FTE B • Tot Available FTE C • Tot Available FTE D • Tot Available FTE E • Tot Available FTE F • Tot Available FTE G • Total Visits

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
22 Facility Summary, Continued	Contains a summary of data at the facility level	• Direct Obligations A • Direct Obligations B • Direct Obligations C • Direct Obligations D • Direct Obligations E • Direct Obligations F • Direct Obligations G • Total Expense A • Total Expense B • Total Expense C • Total Expense D • Total Expense E • Total Expense F • Total Expense G

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
23 Transmission Job	Contains statistical information related to MTF and DTF EAS IV Transmissions	• Process Job ID • Fiscal Year • Fiscal Month • Parent DMIS ID • Successful Data Extract • Service Start • Successful Repository Load Process • Successful Transmit • ASD Record Count • Ambulatory Record Count • Ancillary Record Count • Data Set Record Count • DRG Record Count • Expense Accepted Record Count • Expense Allocated Record Count • Expense Pure Record Count • Personnel Accepted Record Count • Respiratory/ Pulmonary Record Count

Continued on next page

The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
23 Transmission Job, Continued	Contains statistical information related to MTF and DTF EAS IV Transmissions	• Service Unit Cost Record Count • Transmission Software Version nbr • Transmission Job ID • Transmission Status • User ID • Compressed File Name • Requested Transmission Timestamp • Scheduled Timestamp • Transmission Service Timestamp

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
24 Reference Only	Contains all Reference data by fiscal year **NOTE:** This class contains subclasses. The subclasses are marked with * in the Objects in Class name column.	• *Beneficiary Category • Beneficiary Category Code • Beneficiary Category Description • *Capitation Category • Capitation Category • Capitation Description • *CPT Year • Fiscal Year • CPT Code • CPT Code Modifier • CPT Code Type • CPT AMA Short Name • CPT DoD Name • CPT Weight • * Dental Code • Fiscal Year • Dental Code • Dental Code Description • Dental Code Owner • Dental Code DoD Weight • Activation Date

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
24 Reference Only, Continued	Contains all Reference data by Fiscal Year **NOTE:** This class contains subclasses. The subclasses are marked with * in the Objects in Class name column.	• Deactivation Date • *DoD BSL • DoD BSL Code • DoD BSL Description • *DoD PEC • Fiscal Year • DoD PEC • DoD PEC Description • *DoD SEEC • Fiscal Year • DoD SEEC • DoD SEEC Description • DoD SEEC Category • DoD SEEC Category Description • Schedule Type Code • Fixed Cost Percent • *Duty Indicator • Duty Indicator • Duty Indicator Description • *Expense Indicator • Expense Indicator

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
24 Reference Only, Continued	Contains all Reference data by Fiscal Year **NOTE:** This class contains subclasses. The subclasses are marked with * in the Objects in Class name column.	• Expense Indicator Description • *Functional Cost Codes • Fiscal Year • 1st Level Functional Cost Code • 1st Level Functional Cost Code Desc • 2nd Level Functional Cost Code • 2nd Level Functional Cost Code Desc • 3rd Level Functional Cost Code • 3rd Level Functional Cost Code Desc • *Personnel Category • Personnel Category • Personnel Category Description • *Resp / Pulm Codes • Fiscal Year • Resp / Pulm Procedure Code • Resp / Pulm Procedure Description

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The EAS IV Repository Universe, Continued

EAS IV Repository Universe Classes and Objects (continued)

Class	Class Description	Objects in Class
24 Reference Only, Continued	Contains all Reference data by Fiscal Year **NOTE:** This class contains subclasses. The subclasses are marked with * in the Objects in Class name column.	• Resp / Pulm Procedure Weight • *Service Occupation Codes • Skill type Code • Service Code • DoD Occupation Code • DoD Occupation Code Description • Service Occupation Code • Service Occupation Code Description • *Service Unit Codes • Service Unit Code • Service Unit Code Description • *Skill Type • Fiscal Year • Skill type Code • Skill type Code Description • Skill type Suffix Code • Skill type Map Description • *SOF • SOF • SOF Description

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UNIT 3
GETTING STARTED WITH THE EAS IV REPOSITORY

Overview

Introduction

In this unit, you will learn how to get started using the EAS IV Repository.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Log on to and off of Business Objects 5.1.5
- Use the New Report Wizard

In This Unit

This unit includes the following lessons:

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LESSON A
ACCESSING BUSINESS OBJECTS 5.1.5

Overview

Introduction

In this lesson, you will learn how to log on to and log off of Business Objects 5.1.5.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Log on to Business Objects 5.1.5
- Log off of Business Objects 5.1.5

Order of Topics

This lesson includes the following topics:

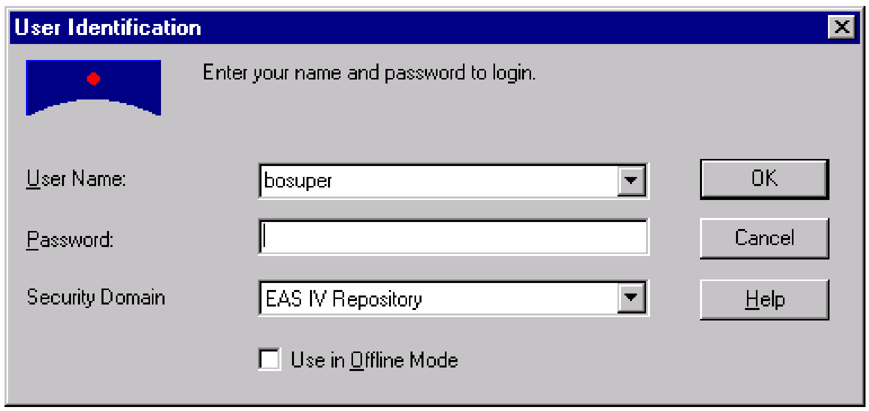
Logging on to Business Objects 5.1.5

Introduction

In this topic, you will learn how to log on to Business Objects 5.1.5. To access Business Objects 5.1.5 and the EAS IV Repository data, you must log on to Business Objects 5.1.5 with your Business Objects 5.1.5 user ID and your Business Objects password.

Procedure

The following table describes how to log on to Business Objects 5.1.5:

Step	Action
1	On the workstation desktop, double-click the Business Objects 5.1.5 icon.
2	In the User Identification window, in the User Name box, type your user name.  **NOTE:** If you have multiple instances of Business Objects 5.x, then you will have a third field, Security Domain. The domain you choose in that box will affect the user IDs that populate in the User Name dropdown list.
3	In the Password box, type your Business Objects password.

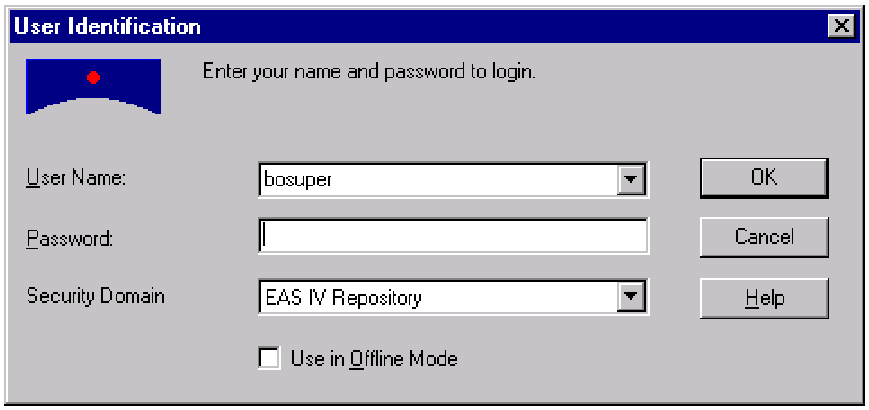
Continued on next page

Logging on to Business Objects 5.1.5, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>In the Security Domain box, click the down arrow.

NOTE: If you do not have multiple Business Objects 5.x applications, then you will not see this field and you may skip step 4 and 5.


</td></tr>
<tr><td>5</td><td>In the list, select the Business Objects repository you want.</td></tr>
<tr><td>6</td><td>Click OK.</td></tr>
</table>

Logging off of Business Objects 5.1.5

Introduction

In this topic, you will learn how to log off of Business Objects 5.1.5. After you create and save your reports, you exit Business Objects by closing the program.

Procedure

The following table describes how to log off of Business Objects 5.1.5:

Step	Action
1	In the Business Objects window, on the File menu, click Exit. **NOTE:** You may also click the Close Window icon ( ) in the upper-right corner of the Business Objects window.

LESSON B
SELECTING REPORTS

Overview

Introduction

In this lesson, you will learn how to use the New Report Wizard to select report formats and data providers.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Use the New Report Wizard to select a standard report
- Use the New Report Wizard to select a standard report with a set default universe
- Use the New Report Wizard to select a report template
- Use the New Report Wizard to select a report template with a set default universe

Order of Topics

This lesson includes the following topics:

Selecting a Standard Report

Introduction

In this topic, you will learn how to use the New Report Wizard to select a standard report. The New Report Wizard guides you through the report format selection process; however, the report does not appear until you create a query and run it. See unit 4 for information on creating and running a query.

Description

The standard report in Business Objects 5.1.5 is a table report. It is possible, however, to format your own standard report style. See unit 8 for more information.

Procedure

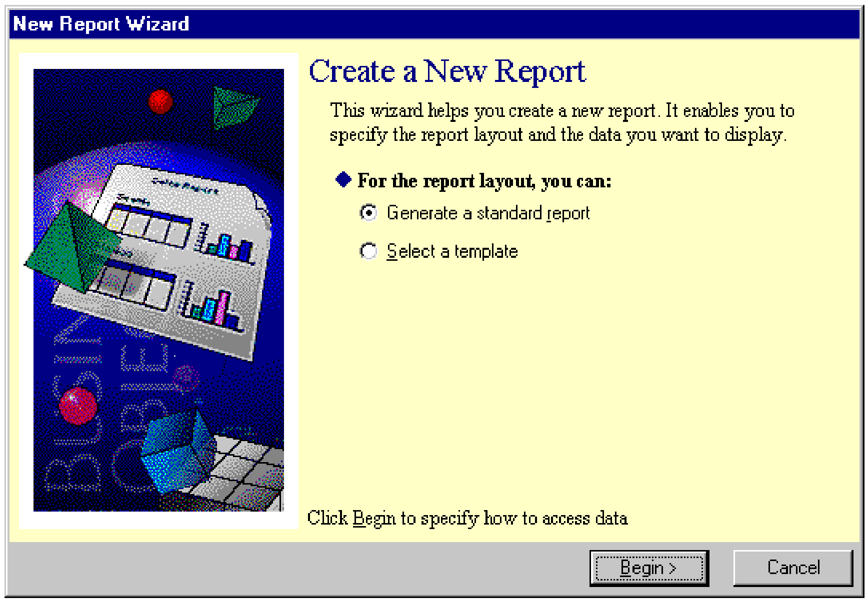
The following table describes how to use the New Report Wizard to select a standard report:

Step	Action
1	Log on to Business Objects 5.1.5.
2	In the Business Objects window, on the File menu, click New. **NOTE:** You may also click the New icon ( ).

Continued on next page

Selecting a Standard Report, Continued

Procedure (continued)

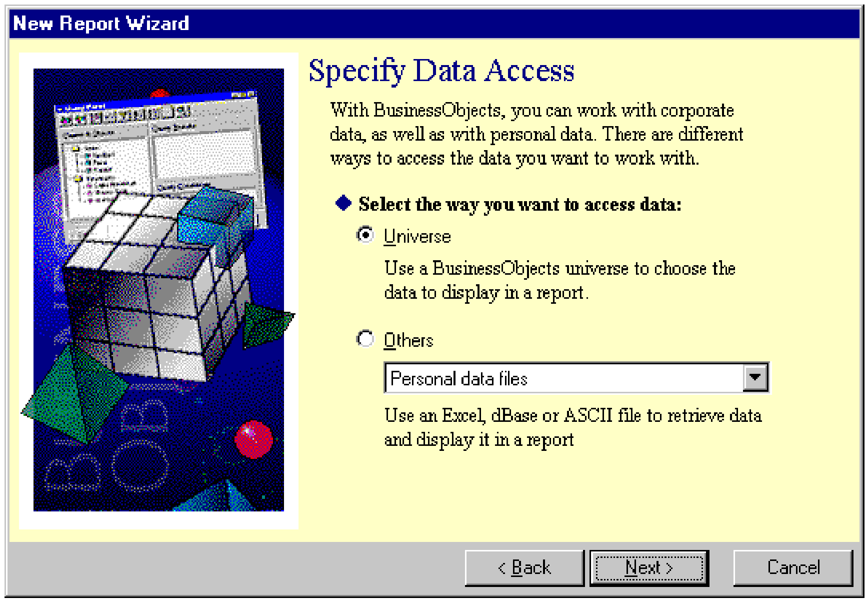
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>In the New Report Wizard, Create a New Report window, click Begin.


NOTE: The default Business Objects 5.1.5 report layout is Generate a standard report. If a default universe has been selected, this window appears with more options; see Selecting a Standard Report With a Set Default Universe.</td></tr>
</table>

Continued on next page

Selecting a Standard Report, Continued

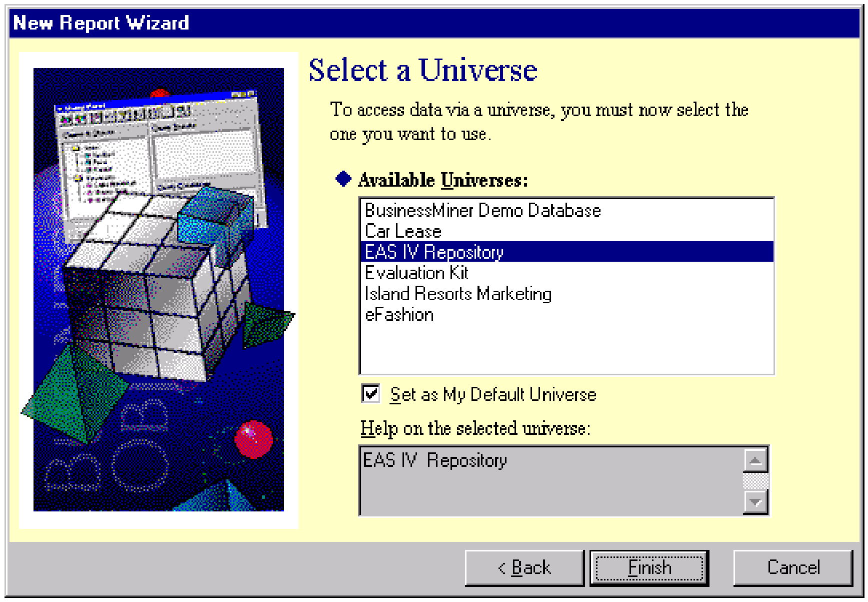
Procedure (continued)

Step	Action
4	In the New Report Wizard, Specify Data Access window, click Next.  **NOTE:** While it is possible to retrieve data using methods other than the default choice, Universe, refreshed MEPRS data can be retrieved only from the default selection.

Continued on next page

Selecting a Standard Report, Continued

Procedure (continued)

Step	Action
5	In the New Report Wizard, Select a Universe window, in the Available Universes list, select EAS IV Repository. 
6	Click Set as My Default Universe.
7	Click Finish.

Selecting a Standard Report With a Set Default Universe

Introduction

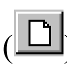
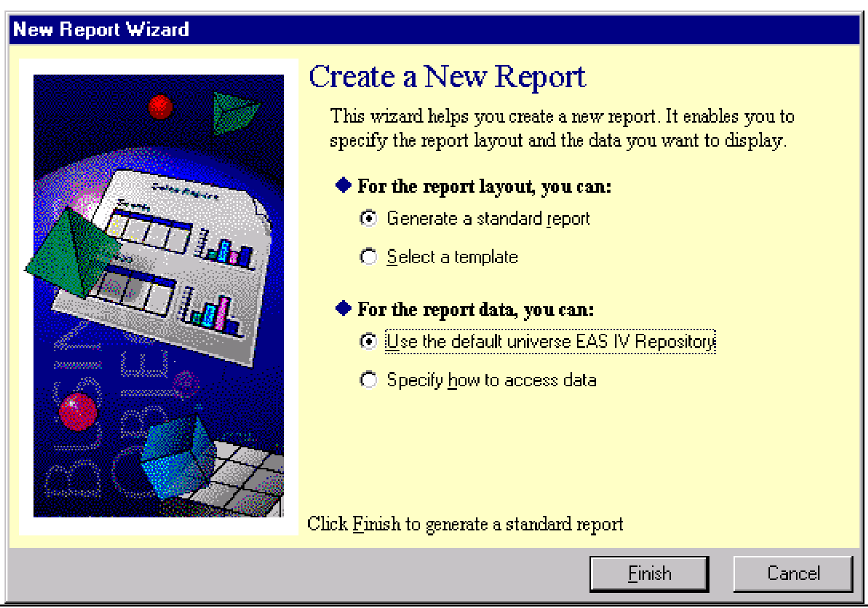
In this topic, you will learn how to use the New Report Wizard to select a standard report format when a default universe is set.

Definition

A <u>default universe</u> is a preselected universe, which is used no matter which type of report format you choose. The only universe option for the EAS IV Repository is the EAS IV Repository universe. Using a default universe makes the process for selecting a standard report faster.

Procedure

The following table describes how to select a standard report when a default universe is already set:

Step	Action
1	Log on to Business Objects 5.1.5.
2	In the Business Objects window, on the File menu, click New. **NOTE:** You may also click the New icon ().
3	In the New Report Wizard, Create a New Report window, click Finish. 

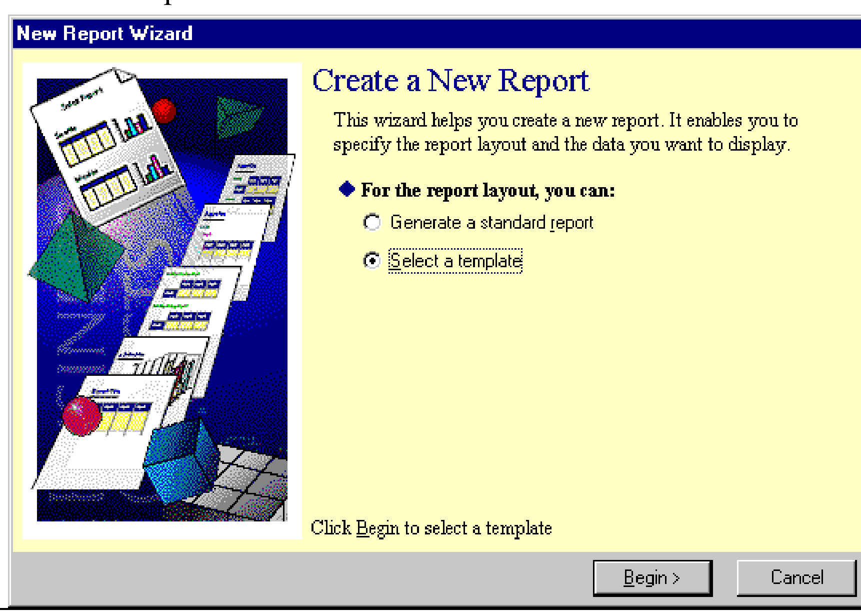
Selecting a Report Template

Introduction

In this topic, you will learn how to use the New Report Wizard to select a report template. Although a standard table format is the default setting for Business Objects 5.1.5, you can select one of nine other established report format templates to create a different look or presentation in your report. You also have the option to create your own template and add it to the list of templates in the New Report Wizard, or browse and select a template saved in another location. See Unit 8, Templates, for information on creating and saving templates.

Procedure

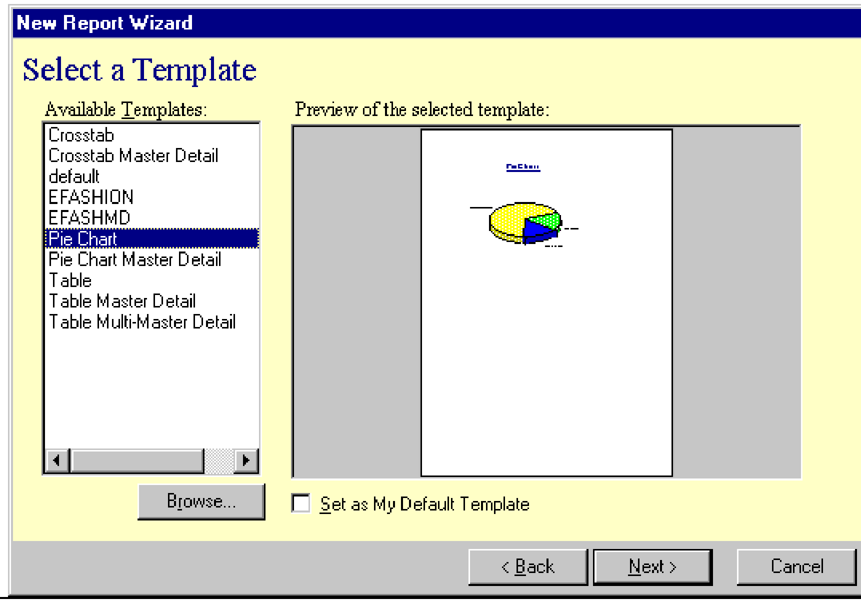
The following table describes how to select a report template:

Step	Action
1	Log on to Business Objects 5.1.5.
2	In the Business Objects window, on the File menu, click New. **NOTE:** You may also click the New icon ( ).
3	In the New Report Wizard, Create a New Report window, click Select a template. 
4	Click Begin.

Continued on next page

Selecting a Report Template, Continued

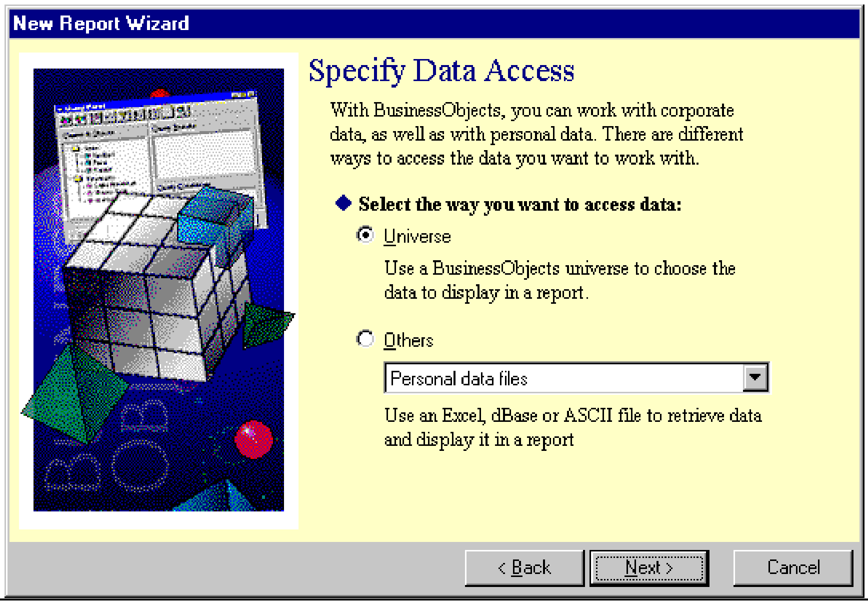
Procedure (continued)

Step	Action
5	If you want to use an established template, in the New Report Wizard, Select a Template window, in the Available Templates list, select a template. 
6	If you want to browse for a template saved in another location, in the New Report Wizard, Select a Template window, click Browse.
7	In the Browse for Folder window, in the list, select the template from its location.
8	Click OK.
9	Click Next.

Continued on next page

Selecting a Report Template, Continued

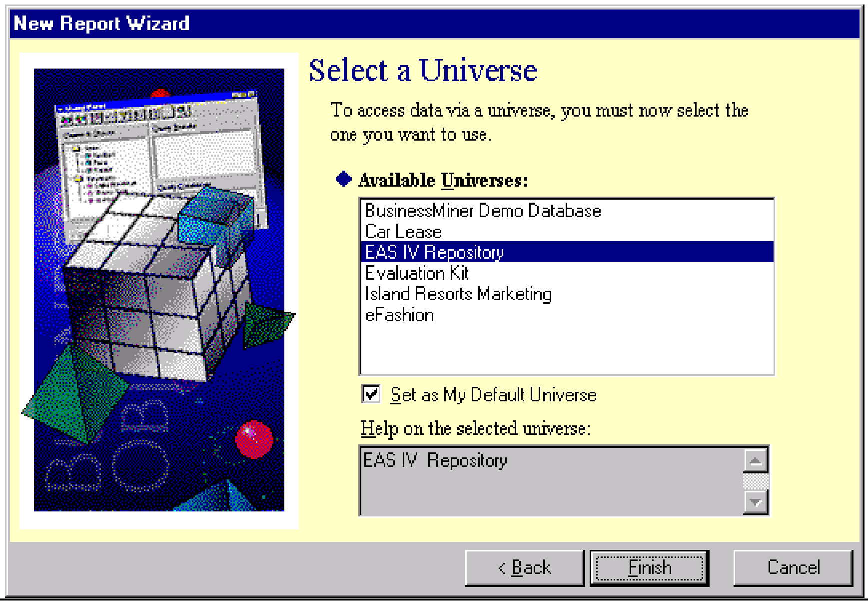
Procedure (continued)

Step	Action
10	In the New Report Wizard, Specify Data Access window, click Next. 

Continued on next page

Selecting a Report Template, Continued

Procedure (continued)

Step	Action
11	In the New Report Wizard, Select a Universe window, in the Available Universes list, select EAS IV Repository. 
12	Click Finish.

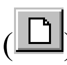
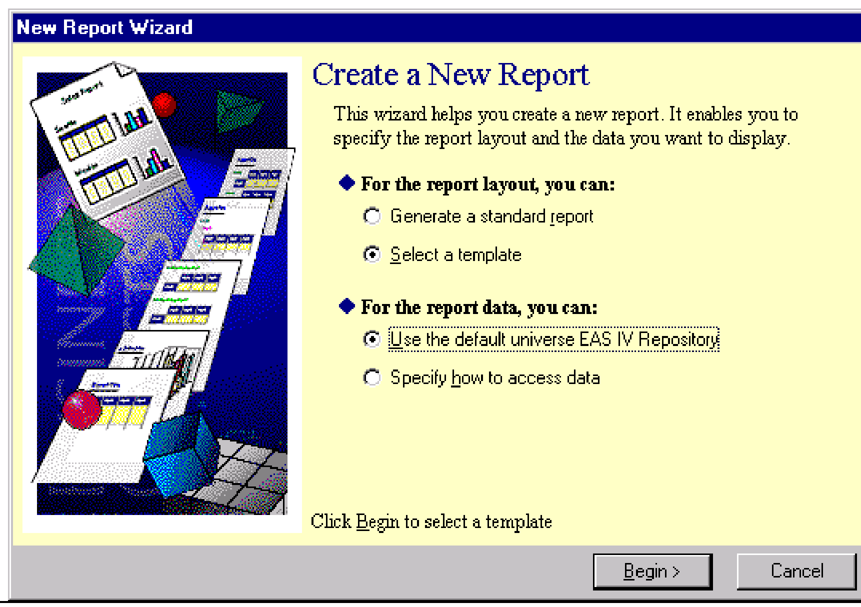
Selecting a Report Template With a Set Default Universe

Introduction

In this topic, you will learn how to use the New Report Wizard to select a report template when a default universe is already set. This process is similar to selecting a report with a set default universe.

Procedure

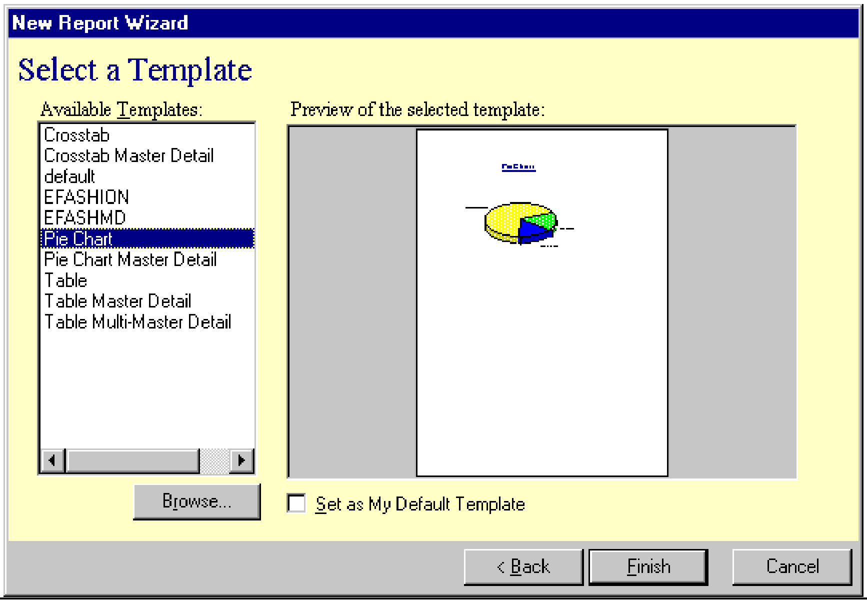
The following table describes how to select a report template with a set default universe:

Step	Action
1	Log on to Business Objects 5.1.5.
2	In the Business Objects window, on the File menu, click New. **NOTE:** You may also click the New icon ().
3	In the New Report Wizard, Create a New Report window, under For the report layout, you can, click Select a template. 
4	Click Begin.

Continued on next page

Selecting a Report Template With a Set Default Universe,
Continued

Procedure (continued)

Step	Action
5	If you want to use an established template, in the New Report Wizard, Select a Template window, in the Available Templates list, select a template. 
6	If you want to browse for a template saved in another location, in the New Report Wizard, Select a Template window, click Browse.
7	In the Browse for Folder window, in the list, select the template from its location.
8	Click OK.
9	Click Finish.

UNIT 4
CREATING QUERIES

Overview

Introduction

In this unit, you will learn how to create queries for EAS IV Repository data that combine with the formatting choices you make in the New Report Wizard to create EAS IV Repository reports.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Describe the Query Panel – EAS IV Repository Universe window
- Work with queries

In This Unit

This unit includes the following lessons:

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LESSON A
LEARNING ABOUT QUERIES

Overview

Introduction

In this lesson, you will learn about queries and the query setup window.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe a query
- Describe the Query Panel – EAS IV Repository Universe window

Order of Topics

This lesson includes the following topics:

What Is a Query?

Introduction

In this topic, you will learn about queries.

Definition

A query is a set of choices and criteria defined by a user to search and retrieve data stored in the server database.

Description

In Business Objects 5.1.5, you can create a query, which is like a set of questions and instructions, to gather information, which is then formatted into a report.

To retrieve data from the EAS IV Repository Universe, you must make selections from the classes and objects in the universe. Also, because the database is so large, you can apply conditions to narrow and specify the data in the report. All queries are set up in the Query Panel – EAS IV Repository Universe window, which automatically generates after you click Finish in the New Report Wizard window. See unit 3 for information on the New Report Wizard. You can also access the Query Panel – EAS IV Repository Universe window from Report Manager. See unit 5 for information on Report Manager.

Business Objects 5.1.5 stores reports in a document, which is similar to storing a report in a file folder. Just as you can have a multi-paged report on one topic in the folder, you can have multiple reports based on the same query. You can also have separate report pages based on different topics, which is comparable to having multiple reports based on different queries, in one document. It is also possible to have a mixture in one document with reports that may be based on the same or different queries. See unit 5 for information on creating duplicate reports and inserting reports with different queries in a document.

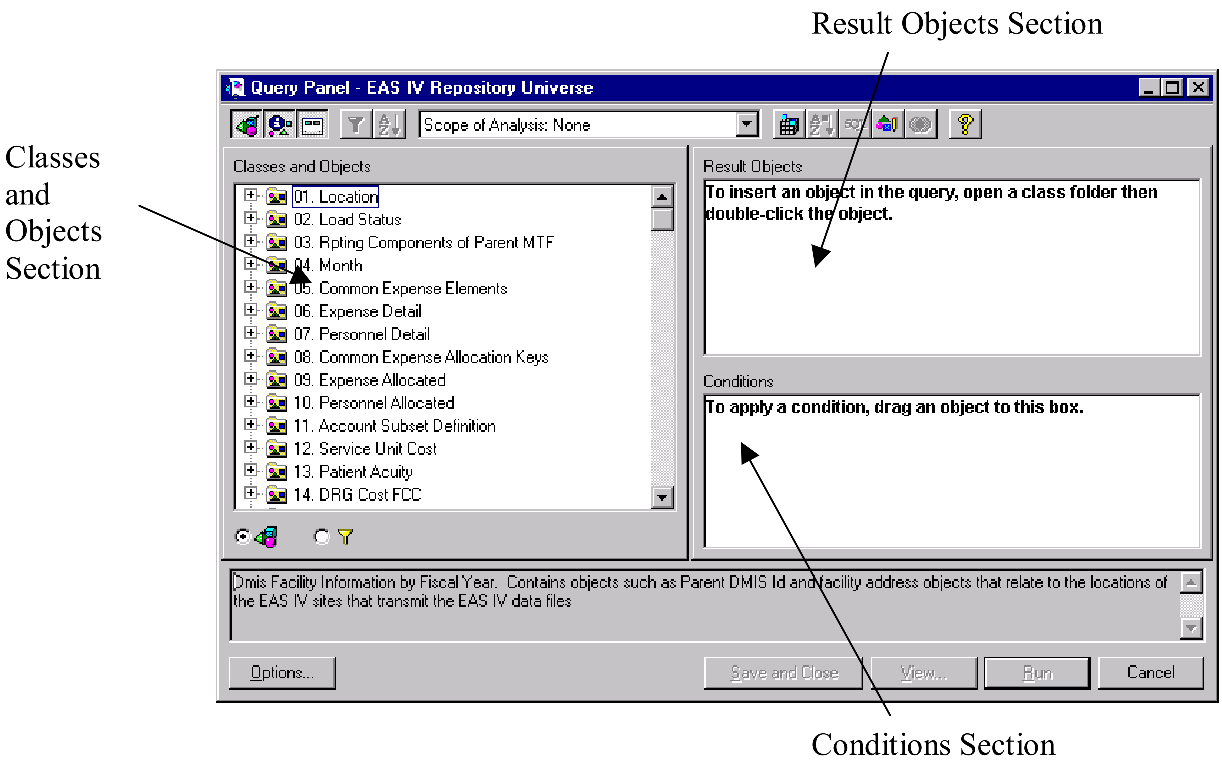
The Query Panel – EAS IV Repository Universe Window

Introduction

In this topic, you will learn about the Query Panel – EAS IV Repository Universe window.

Description

The following diagram represents the three main sections in the EAS IV Repository Universe window:



The Classes and Objects section is a list of all possible data choices you could include in your report. The Result Objects section is the holding area for the selected data, which will be included in your report. The Conditions section is the holding area for all the simple and complex conditions you place on the data in your query, which result in more specific report results.

Continued on next page

The Query Panel – EAS IV Repository Universe Window,
Continued

Icon Description

In addition to the three main sections of the EAS IV Repository Universe window, there is a helpful toolbar, on which only certain functions are available for the EAS IV Repository. These include a function for setting additional options on the query and the ability to save the query or to view the query results without running the report.

The following table describes the icons that can be used in the Query Panel – EAS IV Repository Universe window:

Icon Name/Picture	Description
Show/Hide All Classes	Displays or hides the Classes and Objects section
Show/hide help on selected item	Displays or hides help on a selected class or object
Wrap Result Objects	Aligns objects in the Result Objects section so that you do not need to scroll horizontally to see all objects
Simple Condition	Sets a simple condition on the selected result object
Help	Provides help for the Business Objects 5.1.5 application
Default Scope of Analysis Scope of Analysis: None	Sets the Drill Down level
Scope of Analysis	Creates a complex data range for Drill Down

Continued on next page

The Query Panel – EAS IV Repository Universe Window,
Continued

Icon Description (continued)

Icon Name	Description
Options	Provides formatting options before the query runs
Save and Close	Enables you to save the query if it is not possible to finish or run the query at the current time
View	Provides a view of query results without running the report, in addition to providing some scheduling options
Run	Sends the query to the database to retrieve results and then formats the results in a report
Cancel	Clears the query and returns the user to the New Report Wizard or the Business Objects window, if the New Report Wizard is disabled

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LESSON B
CREATING QUERIES

Overview

Introduction

In this lesson, you will learn how to create queries.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Recognize classes and objects
- Add, format, and delete Result Objects
- Apply simple conditions
- Apply complex conditions
- Edit and delete condition statements
- Set options on a query
- Save a query
- Use View to access Data Manager functions
- Run a query
- Cancel a query

Order of Topics

This lesson includes the following topics:

Continued on next page

Overview, Continued

Order of Topics (continued)

Viewing Classes and Objects

Introduction

In this topic, you will learn how to view classes and objects in the Query Panel – EAS IV Repository Universe window.

Description

Each Universe contains groups of EAS IV Repository data called classes. The classes are further subdivided into objects. For example, a class might be class 06 Expense Detail, and some of the objects within that class might be Direct Expense Month Net and Direct Obligation Month Net. Objects are also arranged in a hierarchical order so that you can perform detailed data analysis. You can include entire classes, represented by folder icons ( ), in a report or choose objects from classes.

The following two types of objects are available for EAS IV Repository data:

- Dimension objects
- Measure objects

Dimension objects, represented by a blue cube, retrieve data that provide the basis for analysis in a report. Typically, dimension objects retrieve character-type data such as names or dates. Measure objects, represented by a pink dot, retrieve numeric data that are the result of calculations on data in the database. For example, the measure objects might be Total Expenses or Total Obligations for an MTF or DTF.

NOTE: Business Objects offers a third type of object represented by a green triangle, detail objects; however, these are not available for EAS IV Repository data.

Continued on next page

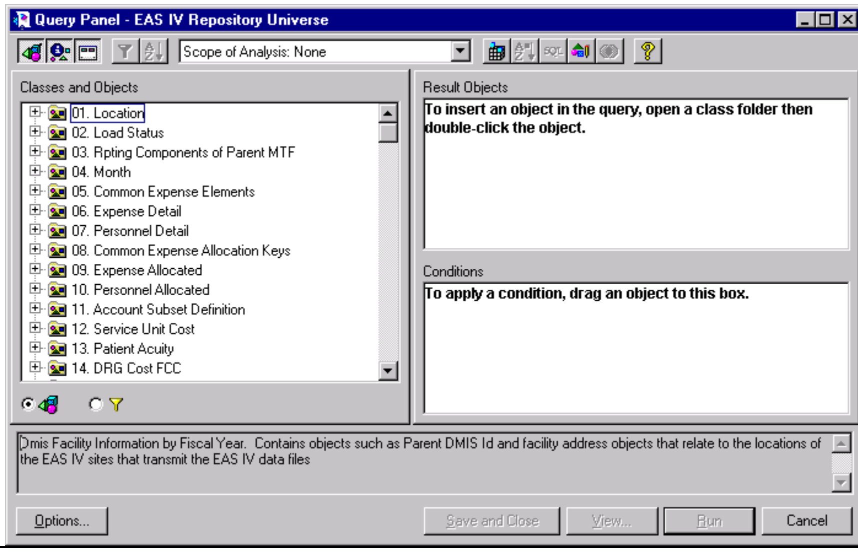
Viewing Classes and Objects, Continued

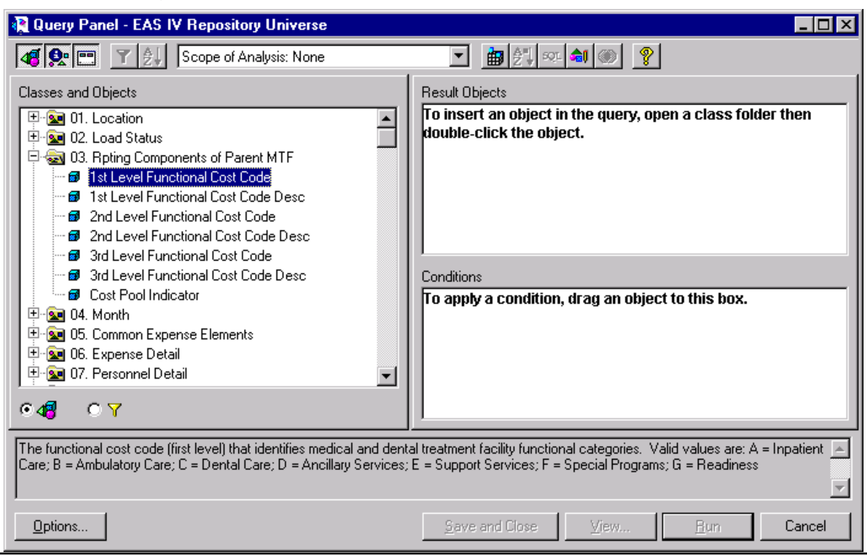
Procedure

The following table describes how to view classes and objects:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Query Panel – EAS IV Repository Universe window, in the Classes and Objects list, click the plus icon (+) next to a class.

NOTE: You may also double-click the class to open it.


</td></tr>
<tr><td>2</td><td>View the objects in the class.


</td></tr>
</table>

Adding a Result Object

Introduction

In this topic, you will learn how to add objects to the Result Objects section from the Classes and Objects section of the Query Panel – EAS IV Repository Universe window.

Definition

Result Objects are the data that appear in a report after you run a query.

Description

EAS IV Repository data received from EAS IV are net month data, containing only amounts for a particular fiscal month and fiscal year for an MTF or DTF. The EAS IV Repository allows for both net month and cumulative (year-to-date) data to be extracted from the database. If you want net month data, add the Fiscal Month object to the Result Objects section. If you want cumulative data, do not add the Fiscal Month object. For net month and cumulative data, specify the fiscal month in the query conditions.

Procedure

The following table describes how to add a Result Object:

Step	Action
1	If the Classes and Objects list is not visible, in the Query Panel – EAS IV Repository Universe window, click the Show/Hide All Classes icon ().

Continued on next page

Adding a Result Object, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>In the Classes and Objects list, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to add an entire class to the Result Objects section</td><td>Drag and drop the folder to the Result Objects box.</td></tr>
<tr><td>You want to add a specific object to the Result Objects section</td><td>a) Next to the folder containing the object, click the plus icon (+).
NOTE: You can also double-click the folder.
b) In the list, double-click the object.
NOTE: You can also drag and drop the object to the Result Objects section.</td></tr>
</table>
</td></tr>
</table>

Formatting a Result Object

Introduction

In this topic, you will learn how to format Result Objects.

Description

Business Objects automatically arranges items from left to right in a standard report, by the order they are added to the Result Objects section. You may need to rearrange the objects before you run the query. Objects are moved in the Result Objects section by dragging and dropping them to new locations. To display objects in the Result Objects section in rows and columns for easier viewing, select the Wrap Result Objects icon ( ). The Wrap Result Objects function does not affect the way the data display in the report.

Procedure for Wrapping Result Objects

The following table describes how to wrap Result Objects:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, click the Wrap Result Objects icon ( ).

Procedure for Moving Result Objects

The following table describes how to move Result Objects:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, in the Result Objects section, drag and drop the object to a new position.

Continued on next page

Formatting a Result Object, Continued

Procedure for Shaping Result Objects

The following table describes how to extend the size of Result Objects:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, in the Result Objects section, drag the right border. **NOTE:** The cursor must change to a horizontal arrow (↔) before you can drag the border.

Deleting a Result Object

Introduction

In this topic, you will learn how to delete Result Objects from the Query Panel – EAS IV Repository Universe window.

Procedure

The following table describes how to delete a Result Object:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, in the Result Objects section, right-click the object you want to delete.
2	On the menu, click Remove. **NOTE:** You may also delete an object by dragging it back to the Classes and Objects section, or by selecting the object and then pressing Delete. If a series of objects needs to be deleted, select the last of the objects in the series and hold down Delete. You do not need to select each of the objects in the series.

Query Conditions

Introduction

In this topic, you will learn about query conditions.

Description

The Conditions section in the Query Panel – EAS IV Repository Universe window allows you to set parameters on your query, which result in more specific report data. Another reason conditions are used is that with more specific query conditions, the database returns quicker results.

You can set a complex condition on any Dimension object, whether it is in the Result Objects section or in the Classes and Objects list. Alternatively, you can set a simple condition on any Dimension object in the Result Objects section. It is also possible to combine complex and simple conditions into groups of conditions.

Condition Statements

Business Objects 5.1.5 writes simple condition statements for you, but you have to write your own complex condition statements with the prompts provided by Business Objects 5.1.5. Regardless of whether the condition is simple or complex, condition statements generally consist of three parts: An object, an operator, and an operand.

- The object is that to which the condition is applied.
- The operator defines how to narrow the data.
- The operand is the value(s) for which the query searches.

The following are examples of condition statements:

4th Level Functional Cost Code matches pattern 'AB_D'

Skill type code between 1 and 5

The first example will supply only 4th Level FCCs that have A in the first level, B in the second level, any letter in the third level, and D in the fourth level.

The second example will supply only those skill types that are 2, 3, or 4.

NOTE: In instances where the operator cancels out the need for an operand, there are only two parts to the condition statement. For example, *Job Id 01 is null* represents a two part condition statement with *Job Id 01* as the object and *is null* as the operator.

Applying Simple Conditions

Introduction

In this topic, you will learn how to apply simple conditions. Simple conditions can only be applied to result objects. When you apply a simple condition, Business Objects creates and formats a condition statement for you. Your involvement is limited to selecting an object, and a value or values from a list.

Procedure

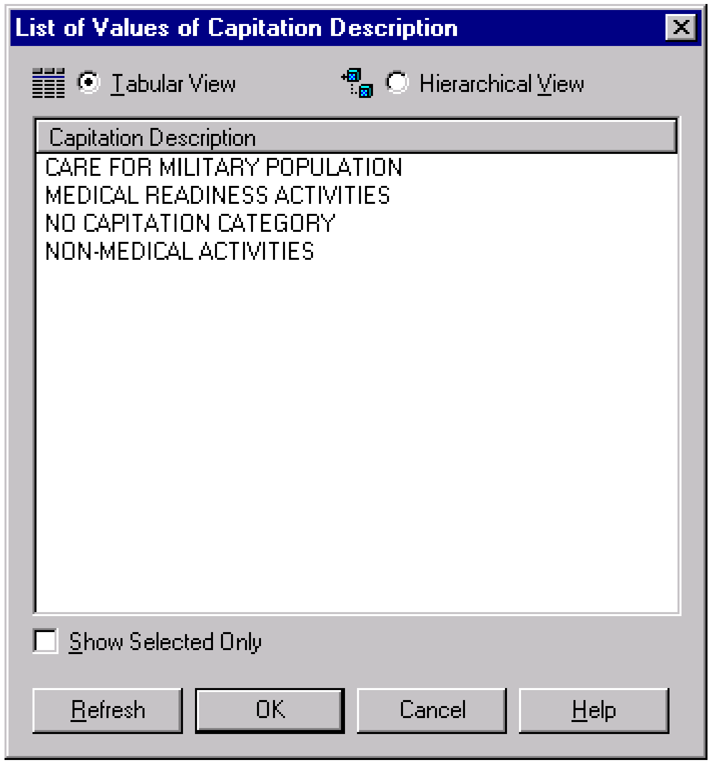
The following table describes how to apply a simple condition:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, in the Result Objects section, right-click the object to which you want to apply the condition.
2	On the menu, click Apply Simple Condition.

Continued on next page

Applying Simple Conditions, Continued

Procedure (continued)

Step	Action
3	In the List of Values <Object Name> window, select the value(s).  **NOTE:** If the window has no list, click Refresh. To select multiple values, press Ctrl and select each item. In some windows, you can drag the pointer down the list to select multiple values.
4	If you want to verify the values you selected in the list, click Show Selected Only.
5	Click OK.

Applying Complex Conditions

Introduction

In this topic, you will learn how to apply complex conditions. Complex conditions may be applied to any Dimension object in the Result Objects section or in the Classes and Objects list. When applying a complex condition, though Business Objects prompts you on how to write the condition statement, it does not write it for you as it does with simple conditions.

Description

The following table describes the available operators for use when creating complex conditions:

Operator	Description
Equal to	Returns values that are equal to the value specified in the operand
Different from	Returns values that are different from the value specified in the operand
In list	Returns values that are equal to one of the values specified in the operand
Not in list	Returns values that are different from (all) the values specified in the operand
Less than	Returns values that are less than the value specified in the operand
Greater than	Returns values that are greater than the value specified in the operand
Less than or equal to	Returns values that are less than or equal to the value specified in the operand
Greater than or equal to	Returns values that are greater than or equal to the value specified in the operand

Continued on next page

Applying Complex Conditions, Continued

Description (continued)

Operator	Description
Is not null	Returns values that contain no empty rows
Is null	Returns values that contain empty rows
Between	Returns values that are between the specified values in operand 1 and operand 2
Not between	Returns values that are not between the values specified in operand 1 and operand 2
Matches pattern	Returns values that have the same pattern as a specified character string, which can contain wildcards such as % or _
Different from pattern	Returns values that have a different pattern from that of a specified character string, which can contain wildcards such as % or _
Both	Returns values that are equal to both value(s) specified in the operand
Except	Returns values that are different from the value(s) specified in the operand

Continued on next page

Applying Complex Conditions, Continued

Description

The following table describes the available operands for use when creating complex conditions:

Operand	Description
Type a new constant	Compares the object's values with the value(s) that you type
Show list of values	Compares the object's values with the value(s) that you select in the object's list of values
Type a new prompt	Compares the object's values with one or more values that you enter when you run the query
Show list of prompts	Compares the object's values with one or more values that you select when you run the query
Select an object	Compares the object's values with the values of another object
Create a subquery (ALL)	Compares the object's values with all the values returned by a subquery
Create a subquery (ANY)	Compares the object's values with any of the values returned by a subquery
Calculation	Compares the object's values with the results of a calculation such as sum, minimum, maximum, average, or count

Continued on next page

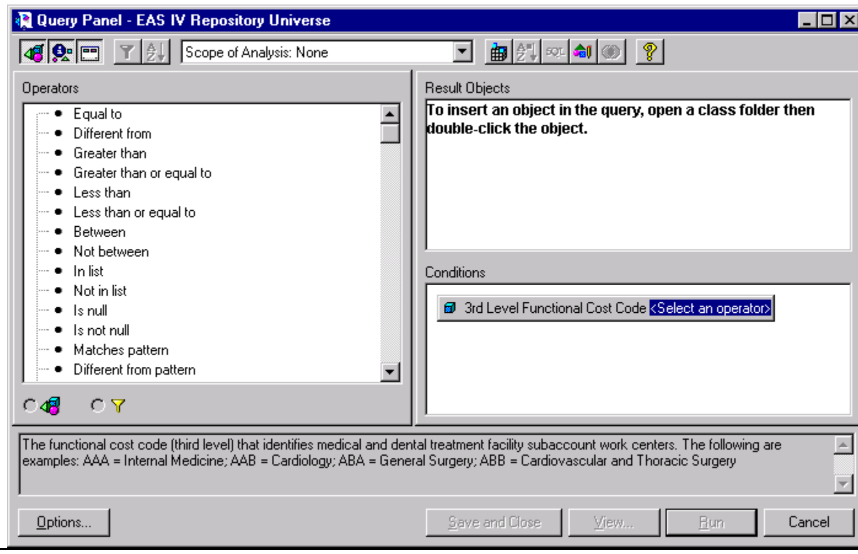
Applying Complex Conditions, Continued

Procedure

The following table describes how to apply a complex condition:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
In the Query Panel – EAS IV Repository Universe window, in the Classes and Objects list, drag an object to the Conditions section.

NOTE: The Classes and Objects list turns into the Operators list, and a <Select an Operator> prompt appears in the condition statement in the Conditions box.

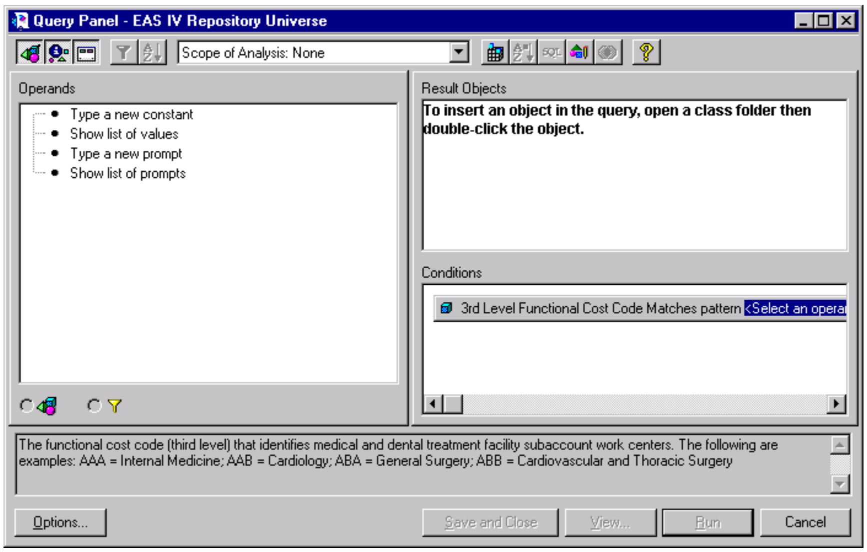


</td></tr>
</table>

Continued on next page

Applying Complex Conditions, Continued

Procedure (continued)

Step	Action
2	In the Operators list, double-click an operator. **NOTE:** The Operators list turns into the Operands list, and a <Select an Operand> prompt appears. The operands that appear depend on the operator you selected. 
3	In the Operands list, double-click the operand you want to use.

Continued on next page

Applying Complex Conditions, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You chose Type a new constant</td><td>a) In the condition statement, in the operand field, type a value.
b) Press Enter.</td></tr>
<tr><td>You chose Show list of values</td><td>a) In the List of Values <Name of Object> window, select the value(s).
b) Click OK.</td></tr>
<tr><td>You chose Type a new prompt</td><td>a) In the condition statement, in the operand field, type the prompt.
NOTE: When typing a prompt, you type the instructions, not the value.
b) Press Enter.</td></tr>
</table>
</td></tr>
</table>

Editing a Condition Statement

Introduction

In this topic, you will learn how to edit a condition statement. It is possible to change any part of a condition statement without deleting it and starting over.

Procedure

The following table describes how to edit a condition statement:

Step	Action
1	If you want to change the object, in the Query Panel – EAS IV Repository Universe window, in the Conditions section, click the object section of the condition statement.
2	In the Classes and Objects list, double-click the new object.
3	If you want to change the operator, in the Query Panel – EAS IV Repository Universe window, in the Conditions section, click the operator section of the condition statement.
4	In the Operators list, double-click the new operator.
5	If you want to change the operand, in the Query Panel – EAS IV Repository Universe window, in the Conditions section, click the operand section of the condition statement.
6	In the Operands list, double-click the new operand.

Deleting a Condition Statement

Introduction

In this topic, you will learn how to delete a condition statement.

Procedure

The following table describes how to delete a condition statement:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, in the Conditions section, right-click the statement you want to delete.
2	On the menu, click Delete.

Setting Query Options

Introduction

In this topic, you will learn how to set query options.

Description

Query options enable you to extend the possible ways your report can develop. The following chart describes the possible query options:

Option	Description
Duplicate/No Duplicate Rows	The report includes or excludes rows of the same information.
Do Not Retrieve Data	You create the query, but it does not gather information from the database to create a report. This function is helpful when you want to create a query but schedule it to run at a later time.
Delete Trailing Blanks	The report omits any blank cells at the end of rows.
Partial Results	You select the number of rows you want to see in the report. Default results in the total amount of rows. Other allows you to type a number.

Continued on next page

Setting Query Options, Continued

Procedure

The following table describes how to set query options:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Query Panel – EAS IV Repository Universe window, click Options.</td></tr>
<tr><td>2</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to exclude duplicate rows of data in your query result</td><td>In the Rows section, select No Duplicate Rows.</td></tr>
<tr><td>You want partial results</td><td>In the Partial Results section, select the appropriate number of rows. If you select Other, type the number of rows you want to display in the query.
NOTE: If you do not limit the results, the query chooses a preselected default value.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Setting Query Options, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2, cont.</td><td><table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to generate the Structured Query Language (SQL) statement for the query without connecting to the database</td><td>Select Do Not Retrieve Data.</td></tr>
<tr><td>You want to delete spaces that appear at the end of a row of data</td><td>Select Delete Trailing Blanks.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Click OK.</td></tr>
</table>

Saving a Query

Introduction

In this topic, you will learn how to save a query.

Description

Saving a query enables you to exit a query and return to it at a later time to complete or run the query. Queries are linked to reports in documents, so it is necessary to save the document as well if you intend to exit Business Objects 5.1.5. Saving a query causes the query to not retrieve data. You must run the query to retrieve data in a report.

Procedure

The following table describes how to save a query:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, create your query.
2	Click Save and Close.
3	In the Business Objects - document <number> - <user ID> window, on the File menu, click Save As.
4	In the Save As window, in the Save in box, select the location where you want to save the document.
5	In the File name box, type the name you wish to apply to the document.
6	Click Save.

Using the Data Manager Through the Query Panel

Introduction

In this topic, you will learn how to access and use the Data Manager.

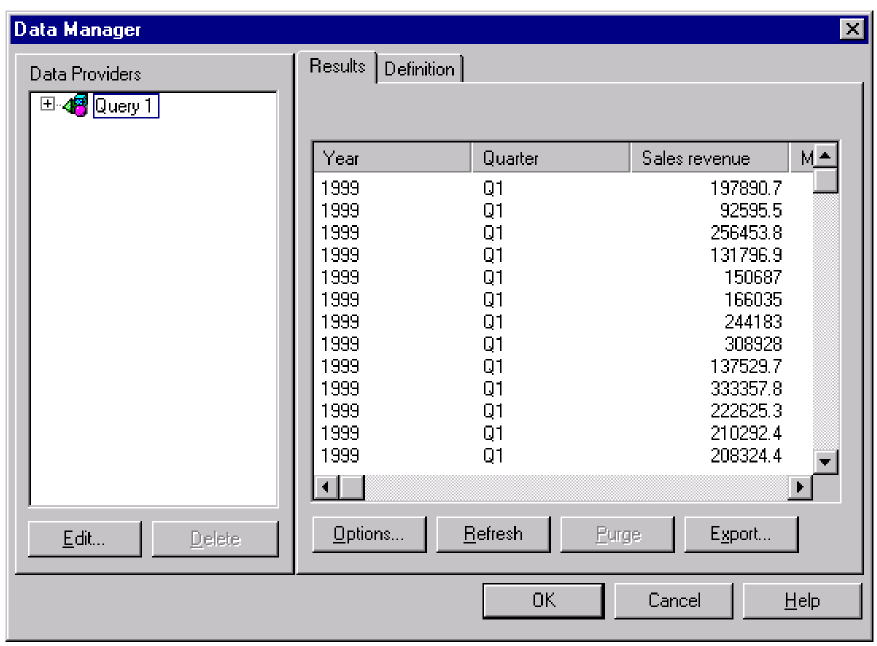
Description

In the Data Manager window, you can view and make changes to a query before performing it. Clicking the View icon in the Query Panel – EAS IV Repository Universe window is one way to access the Data Manager. You can view the number of rows the report displays, edit the query, make changes to the query name and universe, and schedule the report to automatically refresh all before running the query.

Procedure

The following table describes how to use the Data Manager:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Query Panel – EAS IV Repository Universe window, click View.</td></tr>
<tr><td>2</td><td>In the Data Manager window, on the result tab, do one of the following:



</td></tr>
</table>

Continued on next page

Using the Data Manager Through the Query Panel, Continued

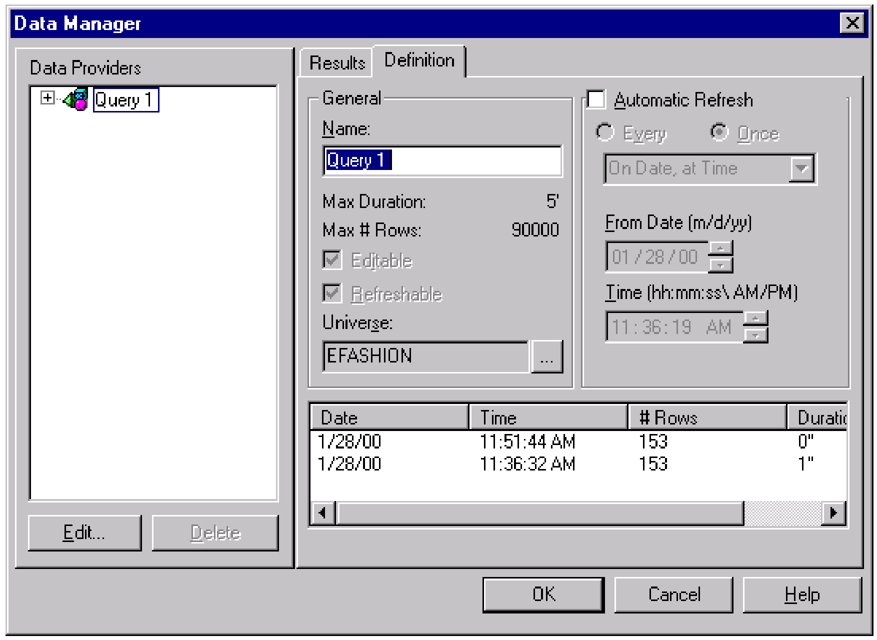
Procedure (continued)

Step	If	Then
2, cont.	You want to edit the query	a) Click Edit. b) In the Query Panel – EAS IV Repository Universe window, make your edits.
	You want to cancel the query and return to the previous window	Click Cancel.
	You want to perform the query and create the report	Click OK.
	You want to delete the data and create a blank report	Click Purge. **NOTE:** This option is only available if the query has already been performed.
	You want to retrieve or refresh the data	Click Refresh.
3	Click the Definition tab.	

Continued on next page

Using the Data Manager Through the Query Panel, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>If you want to rename the query, under General, in the Name box, type a new query name.

</td></tr>
<tr><td>5</td><td>If you want to set an automatic refresh time for your query, click Automatic Refresh.

NOTE: Business Objects must be running in order for the report to refresh.</td></tr>
<tr><td>6</td><td>Set the time and date.</td></tr>
<tr><td>7</td><td>Click OK.</td></tr>
</table>

Running a Query

Introduction

In this topic, you will learn how to run a query. Running a query causes a query that you have set up to poll the database, search and retrieve results, and format them into a report style.

Procedure

The following table describes how to run a query:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, click Run.

Canceling a Query

Introduction

In this topic, you will learn how to cancel a query. Canceling a query causes all query selections to delete and closes the query panel window.

Procedure

The following table describes how to cancel a query:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, click Cancel.

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UNIT 5
FORMATTING REPORTS

Overview

Introduction

In this unit, you will learn how to format reports.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Describe report layout
- Describe the various ways to select cells and blocks
- Format report styles

In this Unit

This unit includes the following lessons:

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LESSON A
LEARNING ABOUT REPORT LAYOUT

Overview

Introduction

In this lesson, you will learn about the structural layout of reports.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe report layout
- Insert additional reports in a document
- Describe Report Manager

Order of Topics

This lesson includes the following topics:

Report Layout

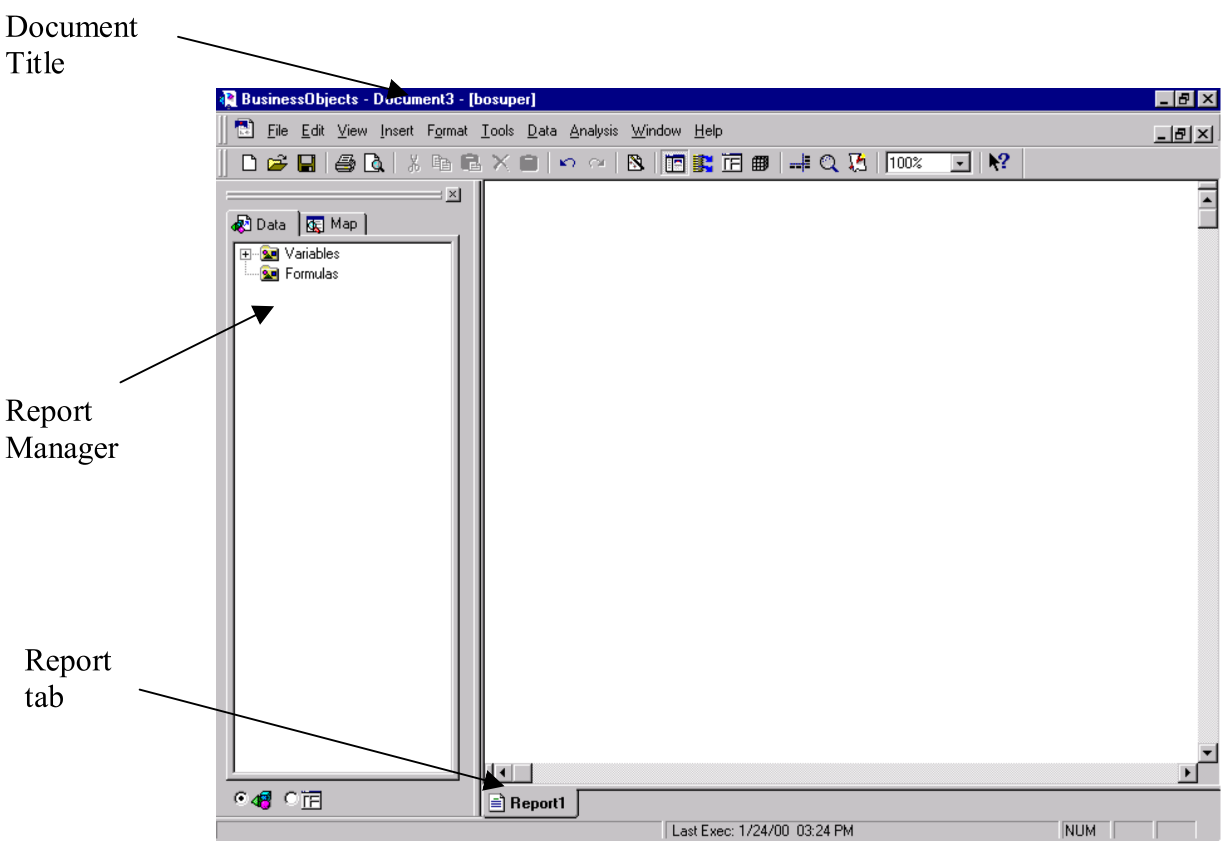
Introduction

In this topic, you will learn about the standard layout of Business Objects 5.1.5 reports.

Description

Reports are stored in documents. A document can contain one report, different views of the same report, completely different reports, or a combination of the latter. The concept is similar to a file folder full of a variety of papers, including single paged, related, and unrelated documents.

After you run a query, Business Objects 5.1.5 automatically generates a document with the report in the format that you chose in the New Report Wizard.



Inserting Reports in a Document

Introduction

In this topic, you will learn how to insert different kinds of reports into a Business Objects 5.1.5 document. It is possible to insert an identical copy of a report, a report that runs off of a different query on the same universe, or a report from a non-EAS IV Repository data provider, like Microsoft Excel.

Definitions

A duplicate report is an exact copy of a report and runs off of the same query. If changes are made to the query, it affects both reports. However, formatting changes are applied individually.

An inserted report runs off of a different query and may have a different report format.

Procedure to Duplicate a Report

The following table describes how to duplicate a report in a document:

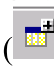
Step	Action
1	In a report, on the Insert menu, click Duplicate Report. **NOTE:** You may also right-click a report tab and click Duplicate Report.

Continued on next page

Inserting Reports in a Document, Continued

Procedure to Insert a Report

The following table describes how to insert a report in a document:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, on the Insert menu, click Insert Report.
NOTE: You may also right-click a report tab and click Insert Report.</td></tr>
<tr><td>2</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to insert a new table report</td><td>a) Click the Insert Table icon ().
b) In the white area of the report, drag out a medium-sized space.
c) In the New Table Wizard, Insert a New Table window, follow the prompts.</td></tr>
<tr><td>You want to insert a new chart report</td><td>a) Click the Insert Chart icon ().
b) In the white area of the report, drag out a medium-sized space.
c) In the New Chart Wizard, Insert a New Chart window, follow the prompts.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Inserting Reports in a Document, Continued

Procedure to Insert a Report (continued)

Step	Action	
	If	**Then**
2, cont.	You want to insert a crosstab	a) Click the Insert Crosstab icon (). b) In the white area of the report, drag out a medium-sized space. c) In the New Crosstab Wizard, Insert a New Crosstab, follow the prompts.

About Report Manager

Introduction

In this topic, you will learn about Report Manager.

Description

Report Manager helps you manage the layout of your report by allowing you to add and subtract Result Objects in a report, and to easily navigate around reports in a document. In addition, Report Manager can return you to the query for any of your reports to edit the query or make a new query.

There are two tabs in Report Manager, the Data tab and the Map tab. The Data tab displays all the queries and their variables in the document and all the formulas. The Map tab displays the reports in the document. The Map tab can also display the structure of the report(s). You activate and deactivate Report Manager by clicking the Report Manager icon () on the Standard toolbar.

Procedure to Insert an Object in a Report with Report Manager

The following table describes how to insert an object in a report with Report Manager:

Step	Action
1	In a report, in Report Manager, on the Data tab, under Variables, select an object. **NOTE:** To select multiple objects, hold down the Ctrl key.
2	Drag and drop the object to a block in the report. **NOTE:** Pay attention to the status bar at the bottom of Business Objects 5.1.5. The bar helps you determine how the object will be placed when you drop it in different locations.

Continued on next page

About Report Manager, Continued

Procedure to Remove an Object From a Report to Report Manager

The following table describes how to remove an object from a report to Report Manager:

Step	Action
1	In a report, select the data portion of the object you want to remove.
2	Drag and drop it to the Data tab of Report Manager.

Procedure to Edit a Query From Report Manager

The following table describes how to edit a query from Report Manager:

Step	Action
1	In Report Manager, on the Data tab, right-click in the Variables area.
2	On the menu, click Edit Data Provider.
3	In the Query Panel - EAS IV Repository Universe window, edit the query.
4	Click Run.

Continued on next page

About Report Manager, Continued

Procedure to Create a New Query From Report Manager

The following table describes how to create a new query from Report Manager:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, in Report Manager, on the Data tab, right-click in the Variables section.</td></tr>
<tr><td>2</td><td>On the menu, click New Data Provider.</td></tr>
<tr><td>3</td><td>In the New Data Wizard, Insert New Data window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to create a new query from the EAS IV Repository database</td><td>a) In the To retrieve new data, you can section, click Build a new query on the universe currently in use.
b) Click Finish.
c) In the Query Panel - EAS IV Repository Universe window, create a query.
d) Run the query.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

About Report Manager, Continued

Procedure to Create a New Query From Report Manager (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont.</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to access your own personal data files from programs such as Excel</td><td>a) In the To retrieve new data, you can section, click Access new data in a different way.
b) Click Begin.
c) In the New Data Wizard, Specify Data Access window, click Others.
d) Verify that Personal Data Files is selected in the box.
e) Click Finish.
f) In the Access Personal Data window, retrieve your data.</td></tr>
</table>
</td></tr>
</table>

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LESSON B
SELECTING CELLS AND BLOCKS

Overview

Introduction

In this lesson, you will learn about the different ways to select cells and blocks within a report.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe the different kinds of cells and blocks in a report
- Describe the different arrows used for selecting cells and blocks

Order of Topics

This lesson includes the following topics:

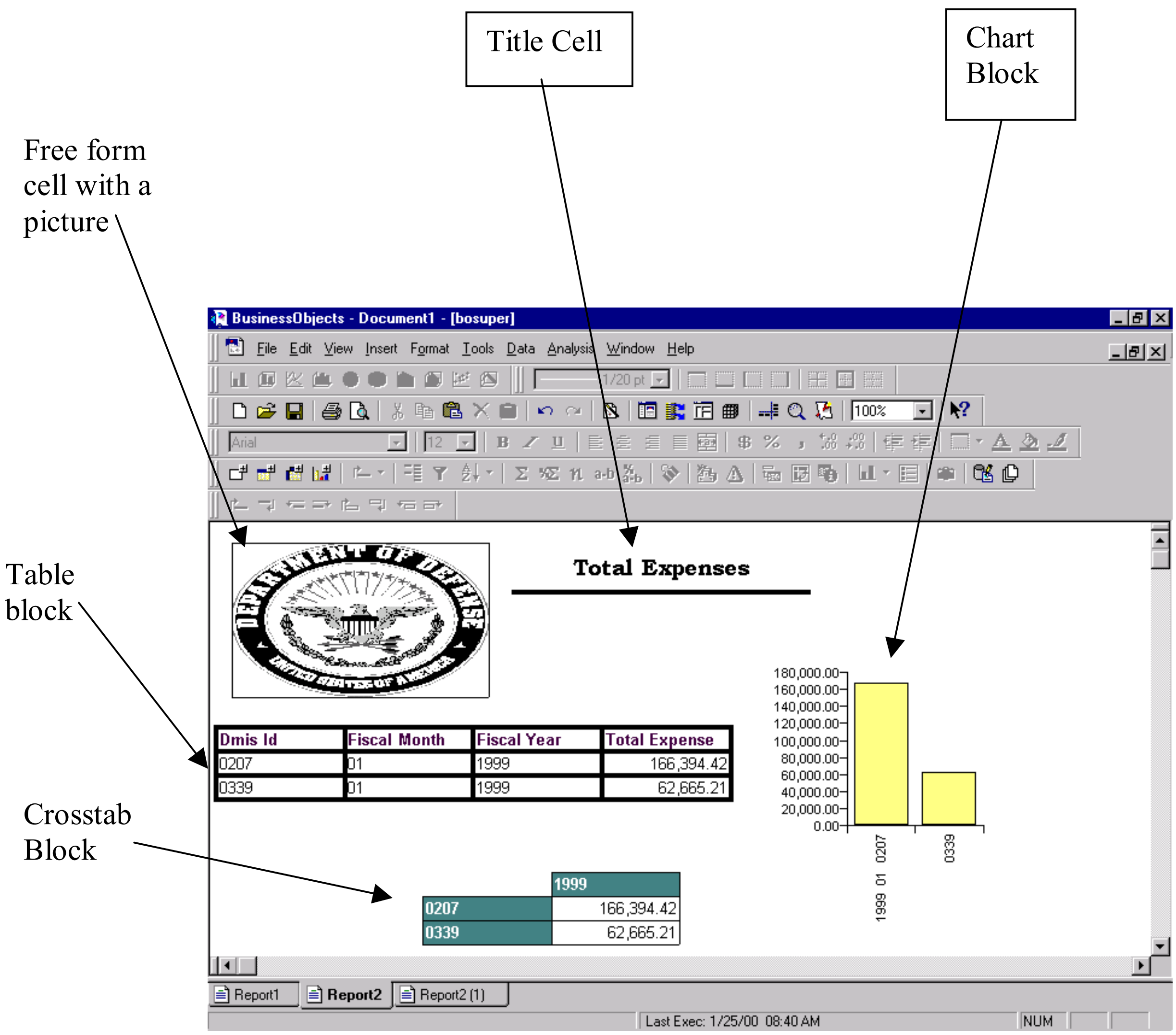
Block and Cell Types

Introduction

In this topic, you will learn about the different types of blocks and cells that a report may contain.

Description

A report may hold up to three different kinds of blocks: A table block, a chart block, and a crosstab block. Blocks consist of cells of data. Cells also make up the supporting data for blocks, such as title cells and free form cells.



Selecting Blocks and Cells

Introduction

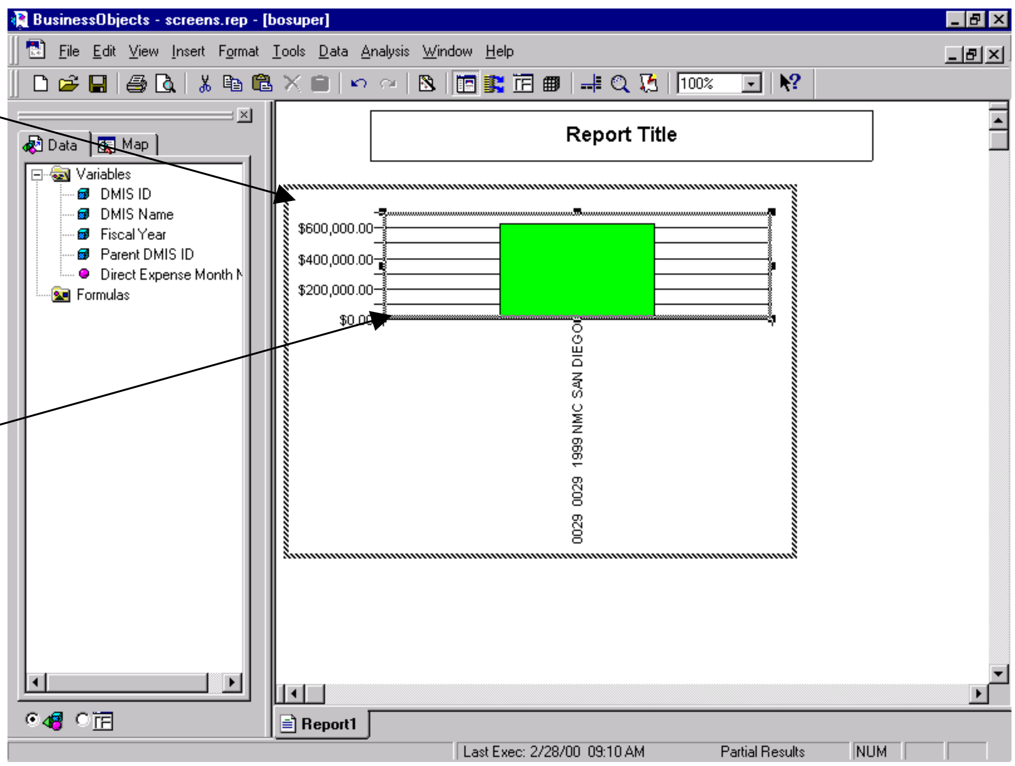
In this topic, you will learn how to select blocks and cells in a report.

Description

There are a variety of different arrows and ways to select blocks and cells in a report. Each different way affects your ability to change the block or cell in a particular way. It is important to pay careful attention to the way you select a block or cell. Practice is the best way to determine all the selections and their effects.

The following diagram displays the various block selections you can make in a report:

This rope border selects the entire block. Click once in a block.

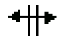
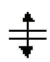


Charts have internal borders for sizing. Click inside the rope border and then drag from the black squares.

Continued on next page

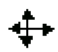
Selecting Blocks and Cells, Continued

The following table describes the kinds of arrows you may use in a report and how to access the arrows:

Symbol	Description	Procedure
	This symbol moves vertical lines from left to right and right to left. It allows you to increase and decrease the width of columns and cell lines.	Hold the cursor over the vertical line you want to change until this symbol appears. Drag the line to its new position.
	This symbol moves horizontal lines from top to bottom and bottom to top. It allows you to increase and decrease the height of columns and cell lines.	Hold the cursor over the horizontal line you want to change until this symbol appears. Drag the line to its new position.
	This arrow selects an entire column of data including the header cell.	Hold the cursor over the top border of the column's header cell. When this arrow appears, left-click.

Continued on next page

Selecting Blocks and Cells, Continued

Symbol	Description	Procedure
	This arrow allows you to select all rows in a table or crosstab.	Hold the cursor over the left border of a row. When this arrow appears, left-click.
	This symbol moves blocks.	Click once in a block to select the block so that the rope border appears. Hold the cursor over the rope border until this symbol appears. Drag the block to its new position.
	This arrow extends the size of charts. It may appear in various positions, diagonal, horizontal, and vertical.	Select a chart so that the rope border and the internal border appear. Hold the cursor over the black square on the line you want to extend. Drag the line to its new position.

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LESSON C
FORMATTING REPORTS

Overview

Introduction

In this lesson, you will learn how to format reports.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe the various methods to use when formatting a report
- Rotate a table
- Change number format
- Change text alignment
- Change borders and shading
- Move columns
- Insert blank columns and rows
- Filter
- Sort
- Set breaks
- Set Master/Detail reports

Order of Topics

This lesson includes the following topics:

Continued on next page

Overview, Continued

Order of Topics (continued)

Ways to Format

Introduction

In this topic, you will learn about the various ways to format a report. In many cases, it is possible to use a variety of methods but end with the same result. Sometimes the method you use is a matter of preference, but it can also be a matter of choosing the method that is easier or faster.

Description

The four basic ways to format a report include using menus, using Report Manager, using Slice and Dice, or directly formatting the report. The following table describes each method.

Method	Description
Menus	To use menus, you must first select the portion of a report you wish to format. Then you click various menu items to choose your format. You can only perform one format function at a time. In most cases right-clicking a selected area offers comparable menu choices.
Report Manager	Report Manager allows you limited access to certain types of formatting, such as the position of objects within a report. Dragging and dropping is easily performed; however, you cannot perform any detailed formatting.

Continued on next page

Ways to Format, Continued

Description (continued)

Method	Description
Slice and Dice	Slice and Dice allows for multi-feature formatting on multiple objects within a block and across blocks. This is the most versatile, easiest and quickest way to format a report.
Direct report formatting	You must select the area of the report you wish to format and then right-click for menu options or use the toolbar icons. This is easy and immediate formatting which can be applied to one column or data section at a time.

Rotating a Table

Introduction

In this topic, you will learn how to rotate a table. Rotating a table causes the header cells to align left and the data to spread horizontally across the report.

Procedure to Rotate a Table With the Format Menu

The following table describes how to rotate a table with the Format menu:

Step	Action
1	In a report, select a table.
2	On the Format menu, click Rotate Table. **NOTE:** You may also right-click and click Rotate Table.

Procedure to Rotate a Table With the Report Toolbar

The following table describes how to rotate a table using the Report toolbar:

Step	Action
1	In a report, select a table.
2	On the Report toolbar, click the Rotate Table icon ().

Changing Number Formatting

Introduction

In this topic, you will learn how to change number formatting in a report. Numbers may erroneously appear out of format, or you may wish to view them in a different format. For example, you can choose how many decimal places you want to see in a number.

Procedure to Change Number Formatting With the Format Menu

The following table describes how to change number formatting with the Format menu:

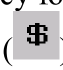
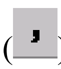
Step	Action
1	In a report, select the cell(s) that you want to format.
2	On the Format menu, click Format Cell. **NOTE:** You may also right-click and click Format Cell.
3	In the Cell Format window, click the Number tab.
4	In the Category box, select the type of number.
5	In the Format box, select the style of number.
6	Click OK.

Continued on next page

Changing Number Formatting, Continued

Procedure to Change Number Formatting With the Formatting Toolbar

The following table describes how to change number formatting with the Formatting toolbar:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	If you want the data in currency format, on the Formatting toolbar, click the Currency Style icon ().
3	If you want the data in percent format, on the Formatting toolbar, click the Percentage Style icon ().
4	If you want the data in million format, on the Formatting toolbar, click the Million Style icon ().
5	If you want to add a decimal place, on the Formatting toolbar, click the Add a Decimal Place icon ().
6	If you want to remove a decimal place, on the Formatting toolbar, click the Remove a Decimal Place icon ().

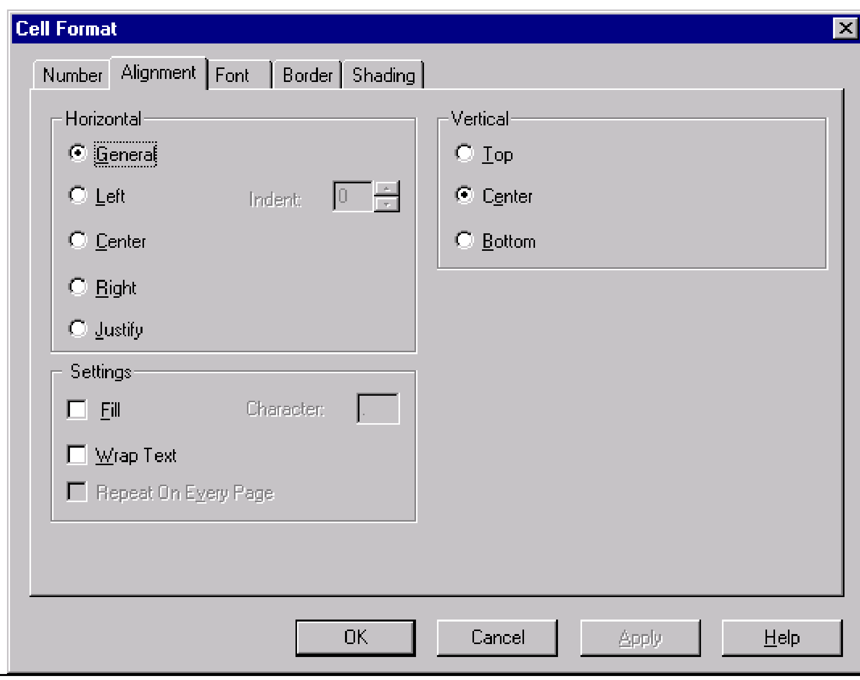
Changing Text Alignment

Introduction

In this topic, you will learn how to change text alignment in a report. You can align text from left to right across a cell as well as up to down in a cell. Wrapping text means the text in cells wraps underneath itself instead of extending in one line from left to right. This helps in reducing column width; however, you may need to adjust the row height.

Procedure to Change Text Alignment With the Format Menu

The following table describes how to change text alignment with the Format menu:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select the cell(s) that you want to format.</td></tr>
<tr><td>2</td><td>On the Format menu, click Format Cell.
NOTE: You may also right-click and click Format Cell.</td></tr>
<tr><td>3</td><td>In the Cell Format window, click the Alignment tab.

</td></tr>
</table>

Continued on next page

Changing Text Alignment, Continued

Procedure to Change Text Alignment With the Format Menu (continued)

Step	Action
4	If you want to align horizontally, under Horizontal, select the alignment.
5	If you want to align vertically, under Vertical, select the alignment.
6	If you want to Wrap text, under Settings, select Wrap Text.
7	Click OK.

Procedure to Change Text Alignment With the Formatting Toolbar

The following table describes how to change text alignment with the Formatting toolbar:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	If you want to align the text left, on the Formatting toolbar, click the Align Left icon ().
3	If you want to center the text, on the Formatting toolbar, click the Center icon ().
4	If you want to align the text right, on the Formatting toolbar, click the Align Right icon ().
5	If you want to justify the text, on the Formatting toolbar, click the Justify icon ().

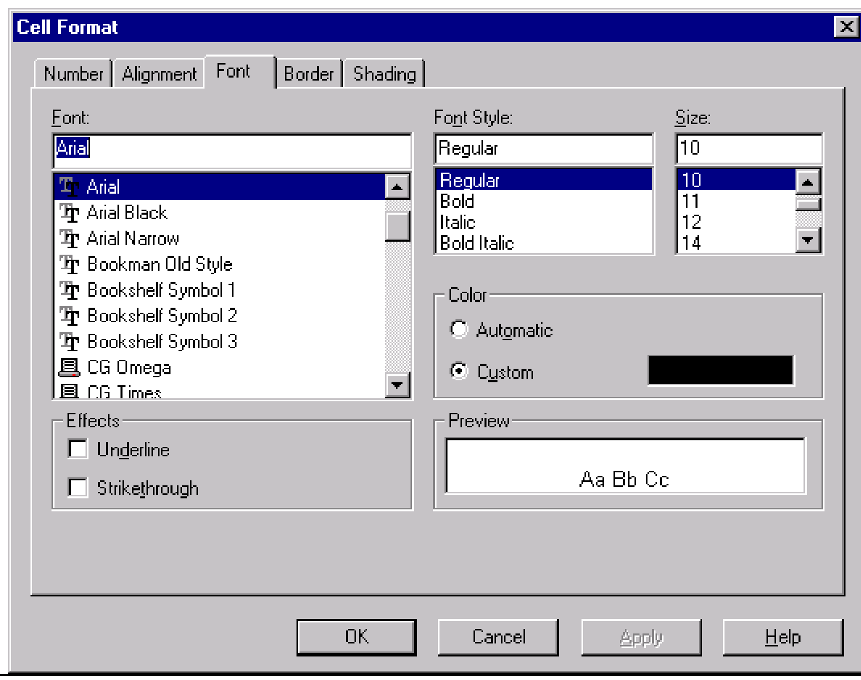
Changing Font

Introduction

In this topic, you will learn how to change the text font in a report.

Procedure to Change Font With the Format Menu

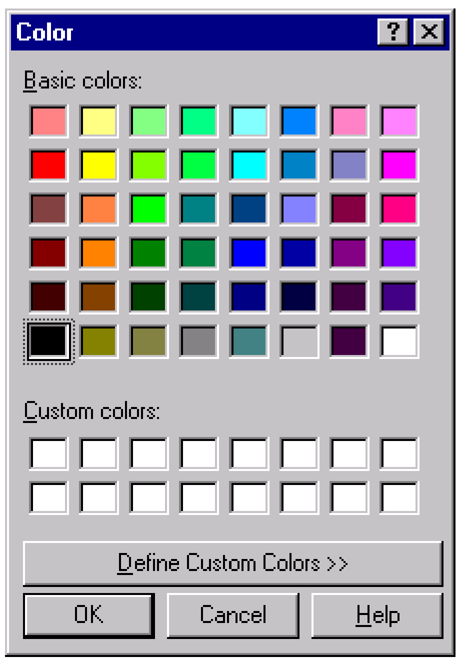
The following table describes how to change font with the Format menu:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	On the Format menu, click Format Cell. **NOTE:** You may also right-click and click Format Cell.
3	In the Cell Format window, click the Font tab. 
4	In the Font box, select a font.
5	In the Font Style box, select a font style.

Continued on next page

Changing Font, Continued

Procedure to Change Font With the Format Menu (continued)

Step	Action
6	In the Size box, select a font size.
7	If you want to underline cell text, under Effects, select Underline.
8	If you want to cross through cell text, under Effects, select Strikethrough.
9	If you want to change the font color, under Color, to the right of Custom, click in the color display field.
10	In the Color window, select a color. 
11	Click OK.
12	In the Cell Format window, click OK.

Continued on next page

Changing Font, Continued

Procedure to Change Font With the Standard Toolbar

The following table describes how to change font with the Standard toolbar:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	If you want to change font style, on the Standard toolbar, in the Font box, click the down arrow (Arial).
3	In the list, select the font style.
4	If you want to change font size, on the Standard toolbar, in the Font Size box, click the down arrow (10).
5	In the list, select the font size.
6	If you want boldface font, on the Standard toolbar, click the bold icon (B).
7	If you want italicized font, on the Standard toolbar, click the Italic icon (I).
8	If you want to underline, on the Standard toolbar, click the Underline icon (U).

Changing Borders

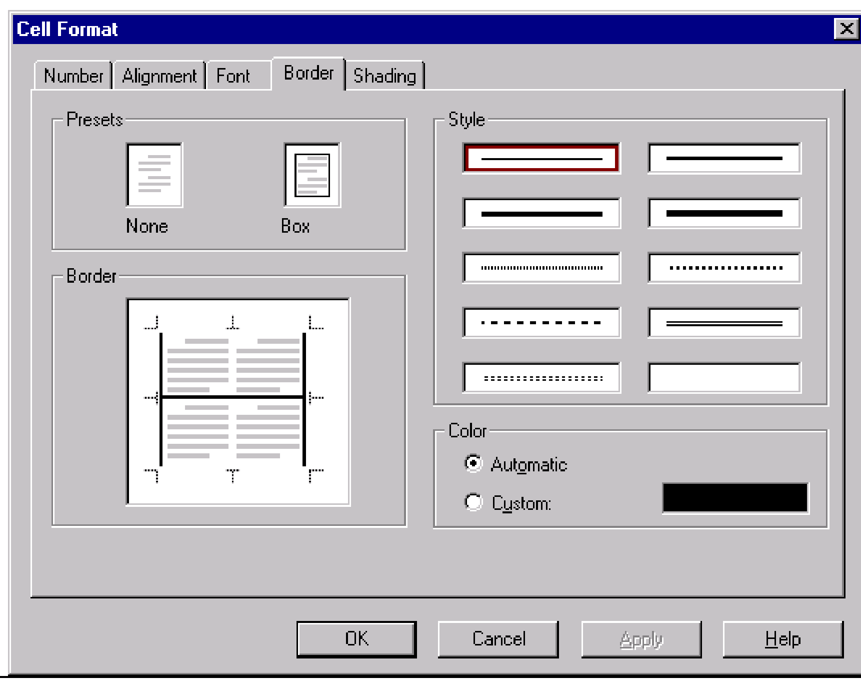
Introduction

In this topic, you will learn how to change border style and color and to remove borders of cells in a report.

Procedure to Change Borders With the Formatting Menu

The following table describes how to change borders with the Formatting menu:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select the cell(s) you want to format.</td></tr>
<tr><td>2</td><td>On the Format menu, click Format Cell.

NOTE: You may also right-click and click Format Cell.</td></tr>
<tr><td>3</td><td>Click the Border tab.


</td></tr>
</table>

Continued on next page

Changing Borders, Continued

Procedure to Change Borders With the Formatting Menu (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td><table><tr><th>If</th><th>Then</th></tr><tr><td>If you do not want any borders</td><td>In the Presets section, click None.</td></tr><tr><td>If you want four exterior borders, or you want to select particular borders</td><td>In the Presets section, click Box.</td></tr></table></td></tr>
<tr><td>5</td><td>If you want to change the style of the border, under Style, select a style.</td></tr>
<tr><td>6</td><td>If you want to select a color or colors for the border, in the Color section, to the right of Custom, click in the color display field.</td></tr>
<tr><td>7</td><td>In the Color window, select a color.

</td></tr>
</table>

Continued on next page

Changing Borders, Continued

Procedure to Change Borders With the Formatting menu (continued)

Step	Action
8	Click OK.
9	In the Border section, click the borderlines that you want to affect with the new color and style. **NOTE:** It is possible to have different colors and styles for each borderline. Repeat steps 5 through 9 for each different borderline.
10	In the Cell Format window, click OK.

Procedure to Change Borders With the Borders Toolbar

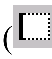
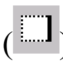
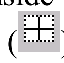
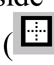
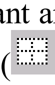
The following table describes how to change borders with the Borders toolbar:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	If you want to change the borderline style, on the Borders toolbar, in the Line Style box, click the down arrow.
3	In the list, select a line style. **NOTE:** To apply the line style change, you must select the borders to which you want to apply this change.
4	If you want to change a top borderline, on the Borders toolbar, click the Top Border icon ( ).
5	If you want to change a bottom borderline, on the Borders toolbar, click the Bottom Border icon ( ).

Continued on next page

Changing Borders, Continued

Procedure to Change Borders With the Borders Toolbar (continued)

Step	Action
6	If you want to change a left borderline, on the Borders toolbar, click the Left Border icon ().
7	If you want to change a right borderline, on the Borders toolbar, click the Right Border icon ().
8	If you want to change the inside border, on the Borders toolbar, click the Inside Border icon ().
9	If you want to change the outside border, on the Borders toolbar, click the Outside Border icon ().
10	If you do not want any border(s), on the Borders toolbar, click the No Border icon ().

Changing Shading

Introduction

In this topic, you will learn how to change the color of cells in a report. Shading refers to the background cell color or the background of the report. In the Format Cell window, on the Shading tab, select Foreground to adjust cell color in a block, and background to adjust the color behind a block. When choosing colors, make sure that the font color and the shading color contrast. If the colors are the same, the data in your report will not be visible. If the colors are similar, your report will be difficult to read.

Procedure to Change Shading With the Format Menus

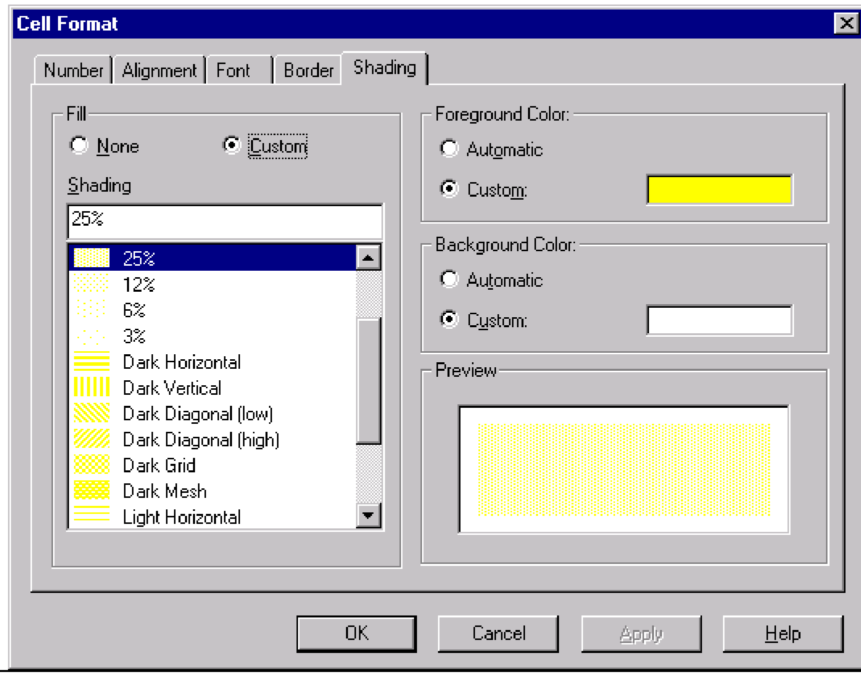
The following table describes how to change shading with the Format menu:

Step	Action
1	Select the cell(s) that you want to format.
2	On the Format menu, click Format Cell. **NOTE:** You may also right-click and click Cell Format.

Continued on next page

Changing Shading, Continued

Procedure to Change Shading With the Format Menu (continued)

Step	Action
3	In the Cell Format window, click the Shading tab. 

Continued on next page

Changing Shading, Continued

Procedure to Change Shading With the Format Menu (continued)

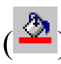
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you do not want any shading</td><td>In the Fill section, select None.</td></tr>
<tr><td>You want shading</td><td>a) In the Fill section, select Custom.
b) In the Shading box, select the amount of shading you want.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>If you want to change the background color, in the Background Color section, to the right of Custom, click in the color display field.</td></tr>
<tr><td>6</td><td>In the Color window, select a color.</td></tr>
<tr><td>7</td><td>Click OK.</td></tr>
<tr><td>8</td><td>If you want to change the color in a cell, in the Cell Format window, in the Foreground Color section, to the right of Custom, click in the color display field.</td></tr>
<tr><td>9</td><td>In the Color window, select a color.</td></tr>
<tr><td>10</td><td>Click OK.</td></tr>
<tr><td>11</td><td>In the Cell Format window, click OK.</td></tr>
</table>

Continued on next page

Changing Shading, Continued

Procedures to Change Shading With the Formatting Toolbar

The following table describes how to change shading with the Formatting toolbar:

Step	Action
1	In a report, select the cell(s) that you want to format.
2	On the Formatting toolbar, click the Background Color icon ().
3	In the Color window, under Basic Colors, click the color you want. 
4	Click OK.

Moving Columns

Introduction

In this topic, you will learn how to move the position of columns in a report.

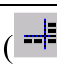
Procedure to Move Columns in a Report

The following table describes how to move columns in a report:

Step	Action
1	In a report, select a data cell in the column you want to move. **NOTE:** Do not select the header cell of the column.
2	Drag and drop the cell to a data cell in a different column.

Procedure to Move Columns With Slice and Dice

The following table describes how to move columns in Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ().
2	In the Slice and Dice Panel window, in the Block Structure section, drag and drop an object to a new position.
3	Click Apply.
4	Click the Close Window icon ().

Continued on next page

Moving Columns, Continued

Procedure to Move Columns With the Report Manger

The following table describes how to move columns with Report Manager:

Step	Action
1	If you want to add a column to your report, on the Data tab of Report Manager, under Variables, drag and drop an object to the report.
2	If you want to remove a column from your report, select a data cell in the column.
3	Drag and drop the column in Report Manager.

Inserting Blank Columns

Introduction

In this topic, you will learn how to insert blank columns in a report.

Procedure to Insert Blank Columns With the Insert Menu

The following table describes how to insert blank columns with the Insert menu:

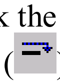
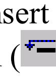
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, in the area that you want to insert a column, select the data portion of a column.</td></tr>
<tr><td>2</td><td>On the Insert menu, click Column.</td></tr>
<tr><td>3</td><td>In the Insert a Column window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to insert to the left of the selected column</td><td>In the Insert a Column window, click Insert a Column to the Left of the Selection.</td></tr>
<tr><td>If you want to insert to the right of the selected column</td><td>In the Insert a Column window, click Insert a Column to the Right of the Selection.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click OK.</td></tr>
</table>

Continued on next page

Inserting Blank Columns, Continued

Procedure to Insert Blank Columns With the Structure Toolbar

The following table describes how to insert a blank column with the Structure toolbar:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, in the area that you want to insert a column, select the data portion of a column.</td></tr>
<tr><td>2</td><td>On the Structure toolbar do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to insert to the right of the selected column</td><td>Click the Insert Column After icon ().</td></tr>
<tr><td>You want to insert to the left of the selected column</td><td>Click the Insert Column Before icon ().</td></tr>
</table>
</td></tr>
</table>

Inserting Blank Rows

Introduction

In this topic, you will learn how to insert a blank row in a report. Rows are not considered individual entities in a report; therefore, formatting applied to one row is applied to all rows.

Procedure to Insert a Blank Row With the Insert Menu

The following table describes how to insert a blank row with the Insert menu:

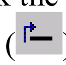
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select the data portion of a row.</td></tr>
<tr><td>2</td><td>On the Insert menu, click Row.</td></tr>
<tr><td>3</td><td>In the Insert a Row window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to insert a blank row above the selected row</td><td>Click Insert a Row Above Selection.</td></tr>
<tr><td>If you want to insert a blank row below the selected row</td><td>Click Insert a Row Below Selection.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click OK.</td></tr>
</table>

Continued on next page

Inserting Blank Rows, Continued

Procedure to Insert a Blank Row With the Standard Toolbar

The following table describes how to insert a blank row with the Standard toolbar:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select the data portion of a row.</td></tr>
<tr><td>2</td><td>On the Standard toolbar, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to insert a blank row above the selected row</td><td>Click the Insert Row Above icon ().</td></tr>
<tr><td>If you want to insert a blank row below the selected row</td><td>Click the Insert Row Below icon ().</td></tr>
</table>
</td></tr>
</table>

Filtering Information

Introduction

In this topic, you will learn how to filter information in a report.

Definition

Filters temporarily remove data to allow you to focus on select data.

Procedure to Insert a Filter in a Report

The following table describes how to insert a filter in a report:

Step	Action
1	In a report, select the data portion of a column.
2	On the Report toolbar, click the Insert Filter icon ().
3	In the Apply a Filter on <Name of Object> window, select the values for which you want to filter the report.
4	Click OK. **NOTE:** Repeat steps 1 through 4 for each filter you want to apply.

Procedure to Insert a Filter With the Insert Menu

The following table describes how to insert a filter with the Insert menu:

Step	Action
1	In a report, select the data portion of a column.
2	On the Insert menu, click Filter.
3	In the Apply a Filter on <Name of Object> window, select the values for which you want to filter the report.
4	Click OK. **NOTE:** Repeat steps 1 through 4 for each filter you want to apply.

Continued on next page

Filtering Information, Continued

Procedure to Insert a Filter With Slice and Dice

The following table describes how to insert a filter with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ( ).
2	In the Slice and Dice Panel window, click the object to which you want to apply a filter.
3	Click the Apply Filter icon ( ).
4	In the Apply a Filter on <Name of Object> window, select the values for which you want to filter the report.
5	Click OK. **NOTE:** Repeat steps 1 through 5 for each filter you want to apply.
6	Click Apply.
7	Click the Close Window icon ( ).

Sorting Data

Introduction

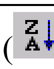
In this topic, you will learn how to sort data in a report.

Definition

A sort orders data in a specific manner, either ascending (the default) or descending. Sorts are applied in the order in which you define them, and the sorts are numbered to show you the order.

Procedure to Apply a Sort With the Report Toolbar

The following table describes how to apply a sort with the Report toolbar:

Step	Action
1	In a report, select the data portion of a column that you wish to sort.
2	If you want an Ascending sort, on the Report toolbar, click the Sorts icon ().
3	If you want a descending sort, on the Report toolbar, click the down arrow on the Insert Sort icon ().
4	Click the Apply Descending Sort icon ().

Continued on next page

Sorting Data, Continued

Procedure to Apply a Sort With the Insert Menu

The following table describes how to apply a sort with the Insert menu:

Step	Action
1	In a report, select the data portion of a column that you wish to sort.
2	If you want to apply an ascending sort, on the Insert menu, point to Sort, and then click Ascending.
3	If you want to apply a descending sort, on the Insert menu, point to Sort, and then click Descending.

Procedure to Apply a Sort With Slice and Dice

The following table describes how to apply a sort with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ( ).
2	In the Slice and Dice Panel window, select the object to which you want to apply a sort.
3	Click the Apply Sort icon ( ).
4	If you want to change from ascending to descending, double-click the sort icon ( ) on the object.
5	Click Apply.
6	Click the Close Window icon ( ).

Setting Breaks

Introduction

In this topic, you will learn how to set breaks in a report. By applying breaks, you can organize your report into meaningful sections, which group similar data items together with a break before the next group of data. As with sorts, when you apply breaks to more than one object, the breaks are numbered to show you the order in which the breaks are applied.

Procedure to Apply Breaks With the Insert Menu

The following table describes how to apply a break with the Insert menu:

Step	Action
1	In a report, select the data portion of a column to which you want to apply a break.
2	On the Insert menu, click Break.

Procedure to Apply a Break With the Report Toolbar

The following table describes how to apply a break with the Report toolbar:

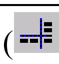
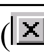
Step	Action
1	In a report, select the data portion of a column to which you want to apply a break.
2	On the Report toolbar, click the Insert Break icon ().

Continued on next page

Setting Breaks, Continued

Procedure to Apply a Break With Slice and Dice

The following table describes how to apply a break with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ().
2	In the Slice and Dice Panel window, select the object to which you want to apply a break.
3	Click the Apply Break icon ().
4	Click Apply.
5	Click the Close Window icon ().

Setting Master/Detail Reports

Introduction

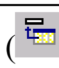
In this topic, you will learn how to set master/detail reports.

Description

If many or all of the cells in a column hold identical data, you may want to set the column's object as a master. When you set an object as master, the report is broken into sections corresponding to the values of the master object. The column corresponding to the master object disappears, and the value of the master object appears as a heading at the beginning of each section of corresponding detail data. However, in Slice and Dice you have the option to keep the data column as part of the report as well as make it a master cell.

Procedure to Set Master/Detail Reports With the Report Toolbar

The following table describes how to set master/detail reports with the Report toolbar:

Step	Action
1	In a report, select the data portion of a column that you want to set as master.
2	On the Report toolbar, click the Set as Master icon ().

Procedure to Set Master/Detail Reports With the Format Menu

The following table describes how to set master/detail reports with the Format menu:

Step	Action
1	In a report, select the data portion of a column that you want to set as master.
2	On the Format menu, click Set as Master.

Continued on next page

Setting Master/Detail Reports, Continued

Procedure to Set Master/Detail in a Report

The following table describes how to set master/detail in a report:

Step	Action
1	In a report, select the data portion of a column that you want to set as master.
2	Drag and drop outside of the block.

Procedure to Set Master/Detail With Report Manager

The following table describes how to set master/detail with Report Manager:

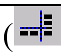
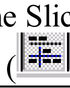
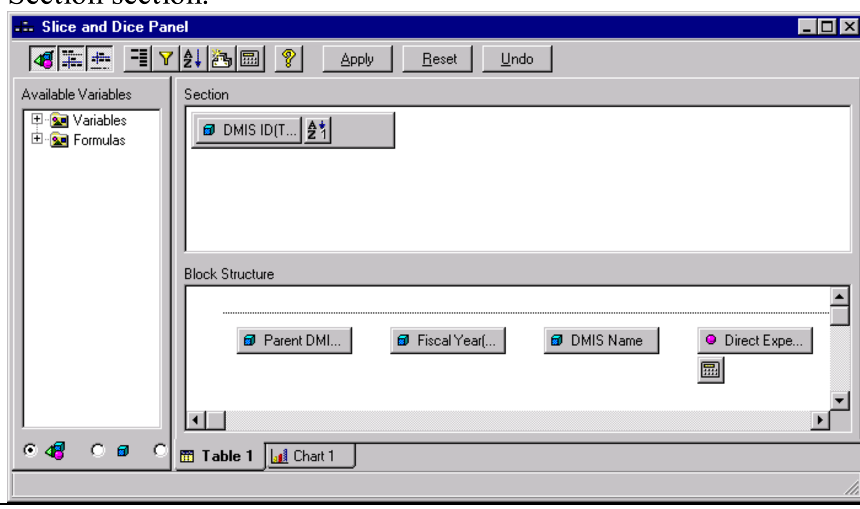
Step	Action
1	In Report Manager, on the Data tab, in the Variables section, drag an object to the report. **NOTE:** You must have at least one column in the report.

Continued on next page

Setting Master/Detail Reports, Continued

Procedure to Set Master/Detail with Slice and Dice

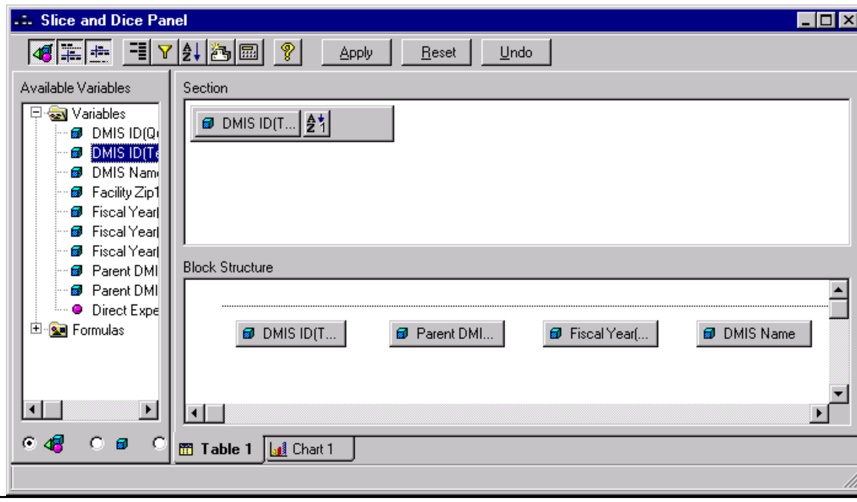
The following table describes how to set master/detail with Slice and Dice.

Step	Action
1	In a report, click the Slice and Dice icon ().
2	In the Slice and Dice Panel window, click the Show/Hide Section icon ().
3	If you want the master cell to be separated from the block, in the Block Structure section, drag the object you want for master to the Section section. 

Continued on next page

Setting Master/Detail Reports, Continued

Procedure to Set Master/Detail with Slice and Dice (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>If you want the master cell to remain as part of the block, in the Available Variables section, under Variables, drag the object you want for master to the Section section.

</td></tr>
</table>

UNIT 6
ANALYZING DATA

Overview

Introduction

In this unit, you will learn how to use a variety of analysis tools to better interpret data results in reports.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Apply simple analysis tools
- Apply complex analysis tools

In This Unit

This unit includes the following lessons:

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LESSON A
SIMPLE ANALYSIS TOOLS

Overview

Introduction

In this lesson, you will learn how to apply simple analysis tools, such as calculations and rankings.

Lesson Objectives

Upon completion of this lesson you will be able to do the following:

- Apply Calculations
- Apply Rankings

Order of Topics

This lesson includes the following topics:

Applying Calculations

Introduction

In this topic, you will learn how to apply various types of calculations to data in a report.

Description

The following table describes the various simple calculations you can perform in a report:

Calculation	Description
Sum	Adds all the values in the selected area of the report
Count	Counts the number of occurrences for the values in the selected area of the report; based on the distinct occurrence of a value
Count All	Counts all occurrences for a value in the selected area of a report; based on any occurrence for a value, whether it is duplicate information or even if there are no data in a row
Average	Calculates the average of all the values in the selected area of the report
Minimum	Determines the smallest value of all the values in the selected area of the report
Maximum	Determines the largest value of all the values in the selected area of the report
Percentage	Calculates and inserts a column with the percentage of all the values in the selected area of the report

Continued on next page

Applying Calculations, Continued

Procedure to Apply Calculations With the Data Menu

The following table describes how to apply calculations with the Data menu:

Step	Action
1	In a report, select the data portion of the column to which you want to apply a calculation.
2	On the Data menu, point to Calculations, and then click the type of calculation you want.

Procedure to Apply Calculations With the Report Toolbar

The following table describes how to apply calculations with the Report toolbar:

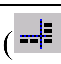
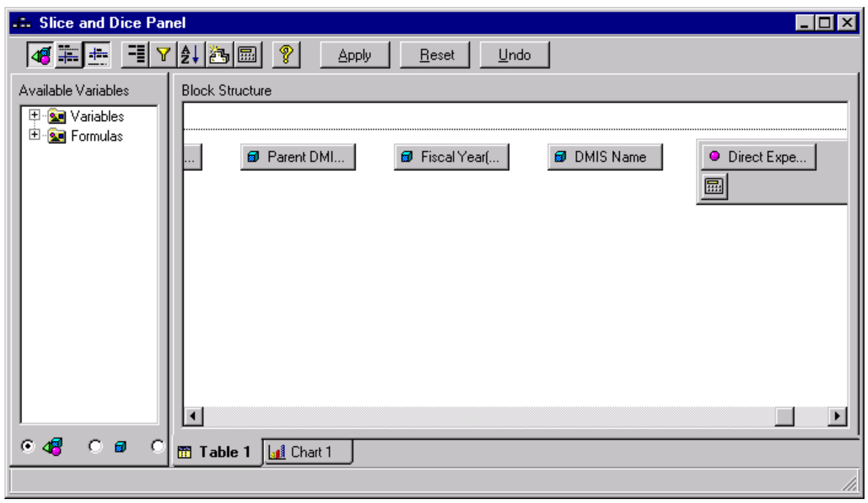
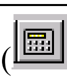
Step	Action
1	In a report, select the data portion of the column to which you want to apply a calculation.
2	If you want a sum, on the Report toolbar, click the Insert Sum icon (Σ).
3	If you want a percentage, on the Report toolbar, click the Insert Percentage icon (%Σ).
4	If you want a count, on the Report toolbar, click the Insert Count icon (n).

Continued on next page

Applying Calculations, Continued

Procedure to Apply Calculations With Slice and Dice

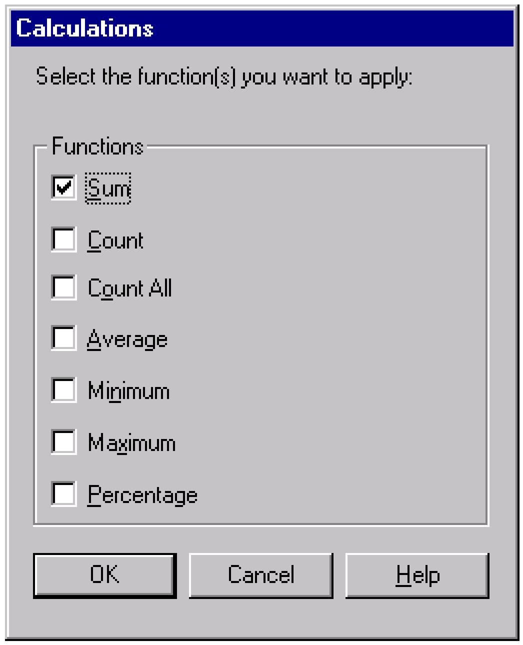
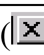
The following table describes how to apply calculations with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ().
2	In the Slice and Dice Panel window, select the object to which you want to apply a calculation. 
3	Click the Insert Calculation icon ().
4	If you want to specify which kind(s) of calculations to apply to the object, double-click the Calculation icon.

Continued on next page

Applying Calculations, Continued

Procedure to Apply Calculations With Slice and Dice (continued)

Step	Action
5	In the Calculations window, under Functions, select the calculations that you want to apply. 
6	Click OK.
7	In the Slice and Dice Panel window, click Apply.
8	Click the Close Window icon ().

Applying Rankings

Introduction

In this topic, you will learn how to apply rankings to data in a report.

Definition

A ranking acts as a filter but is applicable to extreme ranges of data such as the highest and lowest numbers of a category.

Description

A simple sort ranks data from highest to lowest or vice versa. However, a rank also enables you to specify a portion of the data you want ranked, such as a particular top or bottom amount. For example, you could rank based on the top 10 highest salary expenses.

Procedure to Apply a Ranking With the Format Menu

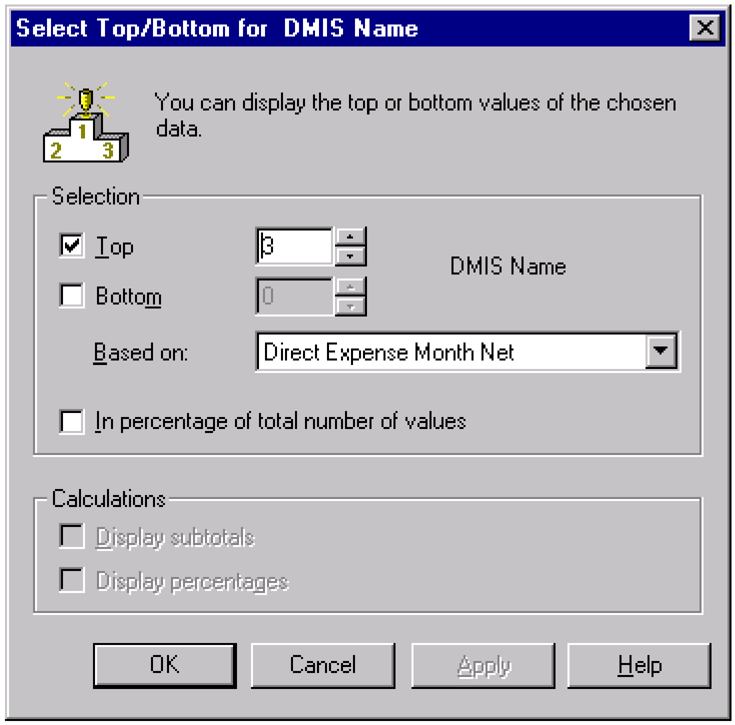
The following table describes how to apply a ranking with the Format menu:

Step	Action
1	In a report, select the data portion of a column based on a dimension object.
2	On the Format menu, click Ranking.

Continued on next page

Applying Rankings, Continued

Procedure to Apply a Ranking With the Format Menu (continued)

Step	Action
3	In the Select Top/Bottom for <Object Name> window, under Selection, in the Based On box, click the down arrow. 
4	In the list, select the measure object whose values you want to rank.

Continued on next page

Applying Rankings, Continued

Procedure to Apply a Ranking With the Format Menu (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td><table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to base the ranking on high values</td><td>a) Under Selection, select Top.
b) Under Top, type a number.</td></tr>
<tr><td>If you want to base the ranking on low values</td><td>a) Under Selection, select Bottom.
b) To the right of Bottom, type a number.</td></tr>
<tr><td>If you want both high and low values</td><td>a) Under Selection, select Top.
b) To the right of Top, type a number.
c) Select Bottom.
d) To the right of Bottom, type a number.</td></tr>
</table></td></tr>
<tr><td>6</td><td>If you want the ranking to display subtotals, under Calculations, select Display Subtotals.</td></tr>
<tr><td>7</td><td>If you want the ranking to display percentages, under Calculations, select Display Percentages.</td></tr>
<tr><td>8</td><td>Click OK.</td></tr>
</table>

Continued on next page

Applying Rankings, Continued

Procedure to Apply Ranking With the Report Toolbar

The following table describes how to apply a ranking with the Report toolbar:

Step	Action
1	In a report, select the data portion of a column based on a dimension object.
2	On the Report toolbar, click the Apply Ranking icon ().
3	In the Select Top/Bottom for <Object Name> window, under Selection, in the Based On box, click the down arrow.
4	In the list, select the measure object whose values you want to rank.

Continued on next page

Applying Rankings, Continued

Procedure to Apply Ranking With the Report Toolbar (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to base the ranking on high values</td><td>a) Under Selection, select Top.
b) To the right of Top, type a number.</td></tr>
<tr><td>If you want to base the ranking on low values</td><td>a) Under Selection, select Bottom.
b) To the right of Bottom, type a number.</td></tr>
<tr><td>If you want both high and low values</td><td>a) Under Selection, select Top.
b) To the right of Top, type a number.
c) Select Bottom.
d) To the right of Bottom, type a number.</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>If you want the ranking to display subtotals, under Calculations, select Display Subtotals.</td></tr>
<tr><td>7</td><td>If you want the ranking to display percentages, under Calculations, select Display Percentages.</td></tr>
<tr><td>8</td><td>Click OK.</td></tr>
</table>

Continued on next page

Applying Rankings, Continued

Procedure to Apply a Ranking With Slice and Dice

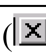
The following table describes how to apply a ranking with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ( ).
2	In the Slice and Dice Panel window, select the dimension object to which you want to apply a ranking.
3	Click the Apply Ranking icon ( ).
4	In the Select Top/Bottom for <Object Name> window, under Selection, in the Based On box, click the down arrow.
5	In the list, select the measure object whose values you want to rank.

Continued on next page

Applying Rankings, Continued

Procedure to Apply a Ranking With Slice and Dice (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>If you want to base the ranking on high values</td><td>a) Under Selection, select Top.
b) To the right of Top, type a number.</td></tr>
<tr><td>If you want to base the ranking on low values</td><td>a) Under Selection, select Bottom.
b) To the right of Bottom, type a number.</td></tr>
<tr><td>If you want both high and low values</td><td>a) Under Selection, select Top.
b) To the right of Top, type a number.
c) Select Bottom.
d) To the right of Bottom, type a number.</td></tr>
</table>
</td></tr>
<tr><td>7</td><td>If you want the ranking to display subtotals, under Calculations, select Display Subtotals.</td></tr>
<tr><td>8</td><td>If you want the ranking to display percentages, under Calculations, select Display Percentages.</td></tr>
<tr><td>9</td><td>Click OK.</td></tr>
<tr><td>10</td><td>In the Slice and Dice Panel window, click Apply.</td></tr>
<tr><td>11</td><td>Click the Close Window icon ().</td></tr>
</table>

LESSON B
COMPLEX ANALYSIS TOOLS

Overview

Introduction

In this lesson, you will learn how to apply complex analysis tools, such as variables and alerters, to data in a report.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Create Variables
- Create Alerters
- Drill through layers of data

Order of Topics

This lesson includes the following topics:

Creating New Variables

Introduction

In this topic, you will learn how to create new variables and insert them in a report.

Definition

Variables are objects you create based on a formula, which combines other predefined objects from the database. For example, you might create a variable to show the difference between expenses and obligations, or a variable to show average daily patient load.

Procedure to Insert a Variable With the Data Menu

The following table describes how to insert a variable with the Data menu:

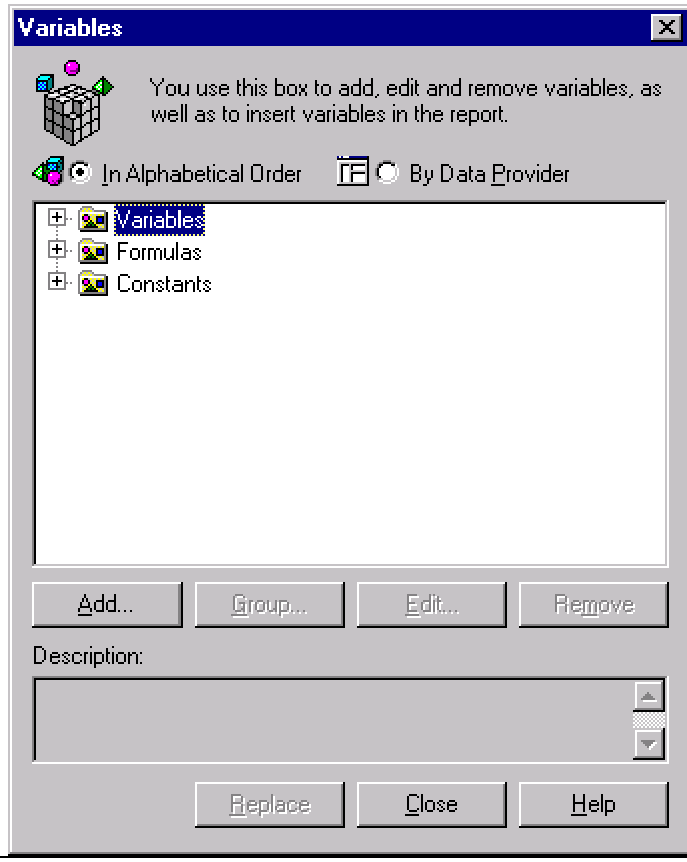
Step	Action
1	In a report, insert a blank column.
2	Select the data portion of the blank column.
3	On the Data menu, click Variables. **NOTE:** You may also right-click and click Variables.

Continued on next page

Creating New Variables, Continued

Procedure to Insert a Variable With the Data Menu (continued)

Step	Action
4	In the Variables window, click Add.



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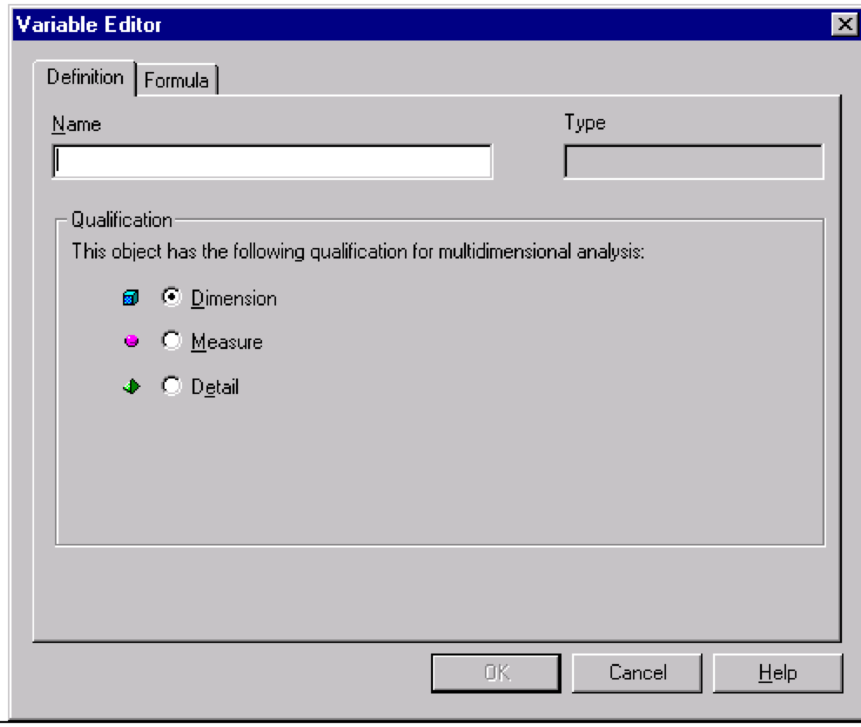
Creating New Variables, Continued

Procedure to Insert a Variable With the Data Menu (continued)

Step	Action
5	In the Variable Editor window, click the Definition tab. 
6	In the Name box, type the name of the variable.
7	Under Qualification, select the type of variable.

Continued on next page

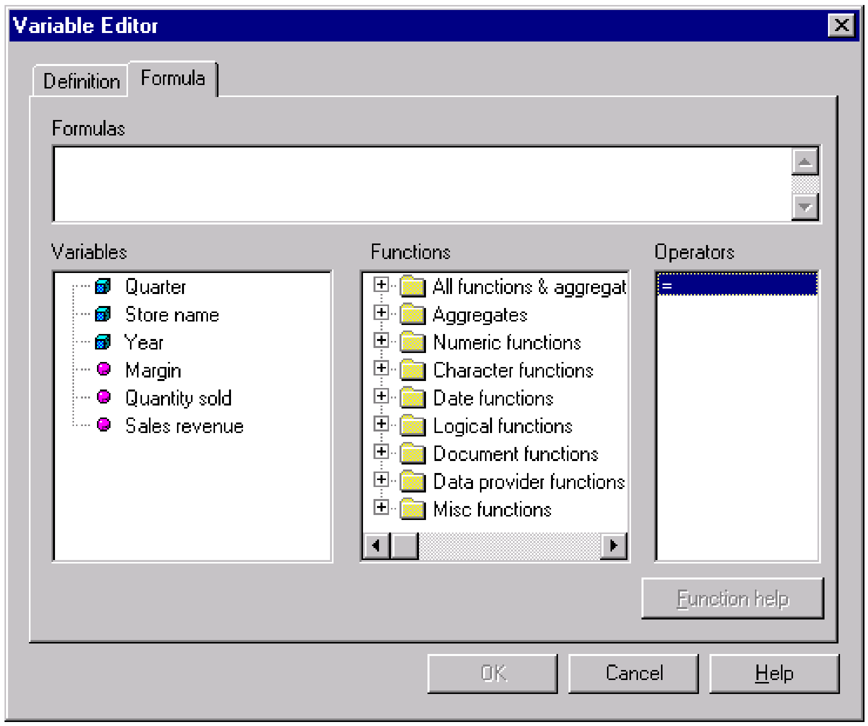
Creating New Variables, Continued

Procedure to Insert a Variable With the Data Menu (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Click the Formula tab.</td></tr>
<tr><td>9</td><td>

In the Formulas box, create the formula for the variable.

NOTE: You may do this by typing the formula or by double-clicking in the Operators, Functions, and Variables sections. All variables must start with the equal sign.

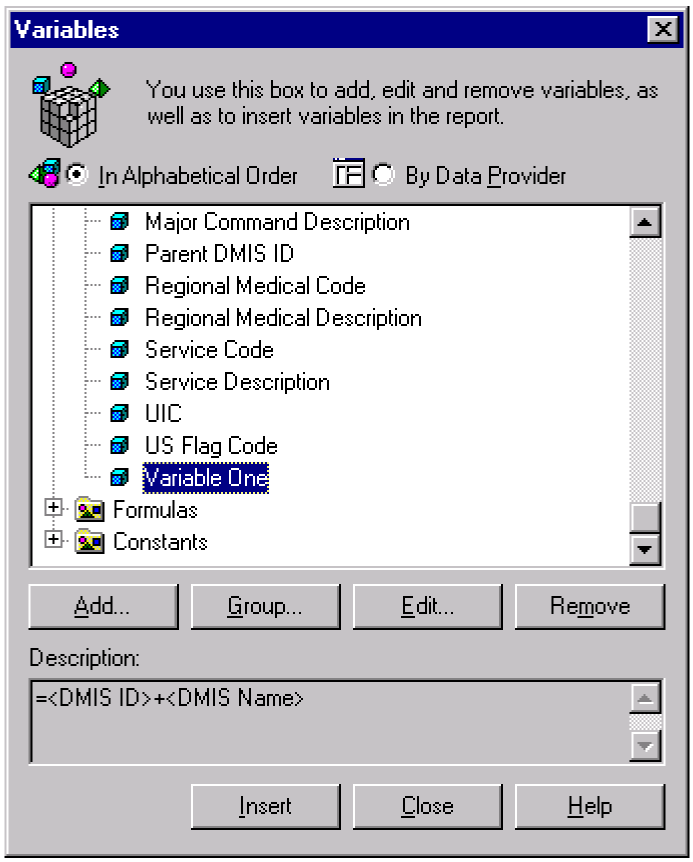


</td></tr>
</table>

Continued on next page

Creating New Variables, Continued

Procedure to Insert a Variable With the Data Menu (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Click OK.</td></tr>
<tr><td>11</td><td>In the Variables window, click Insert.

</td></tr>
</table>

Continued on next page

Creating New Variables, Continued

Procedure to Insert a Variable With Report Manager

The following table describes how to insert a variable with Report Manager:

Step	Action
1	In a report, insert a blank column.
2	Select the data portion of the blank column.
3	In Report Manager, on the Data tab, right-click Variables.
4	On the menu, click New Variable.
5	In the Variables window, click Add.
6	In the Variable Editor window, click the Definition tab.
7	In the Name box, type the name of the variable.
8	Under Qualification, select the type of variable.
9	Click the Formula tab.
10	In the Formula box, create the formula for the variable. **NOTE:** You may do this by typing the formula or by double-clicking in the Operators, Functions, and Variables sections. All variables must start with the equal sign.
11	Click OK.
12	In the Variables window, click Insert.

Creating Alerters

Introduction

In this topic, you will learn how to create an Alerter and insert it into a report.

Definition

An alerter is a combination of criteria that you set up to draw attention to data that meet certain requirements by highlighting text or overwriting the text with a message of your choice.

Procedure to Create Alerters With the Format Menu and the Report Toolbar

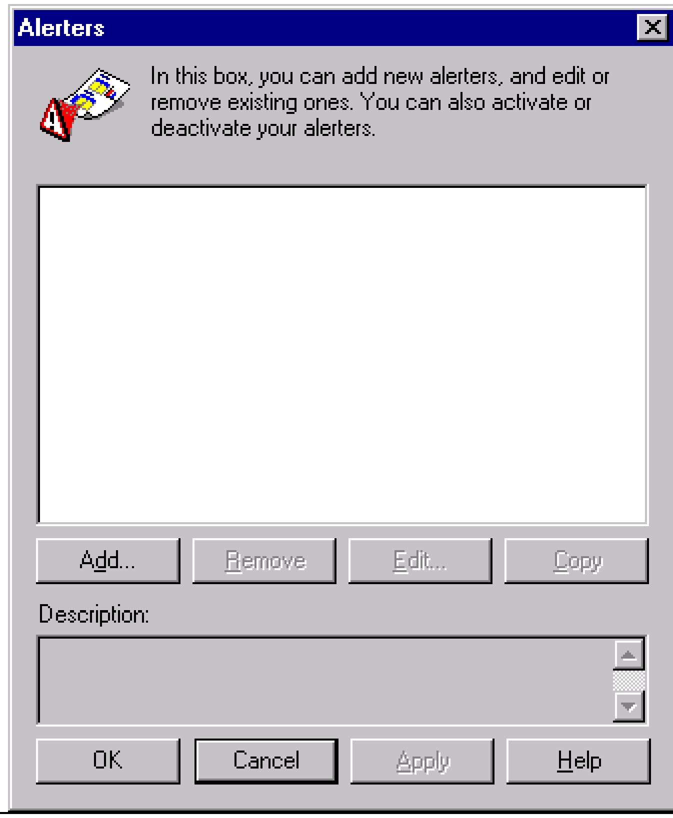
The following table describes how to create alerters with the Format menu and the Report toolbar:

Step	Action
1	Select the data portion of a report to which you want to apply an alerter.
2	On the Format menu, click Alerters. **NOTE:** You may also click the Alerters icon () on the Report toolbar.

Continued on next page

Creating Alerters, Continued

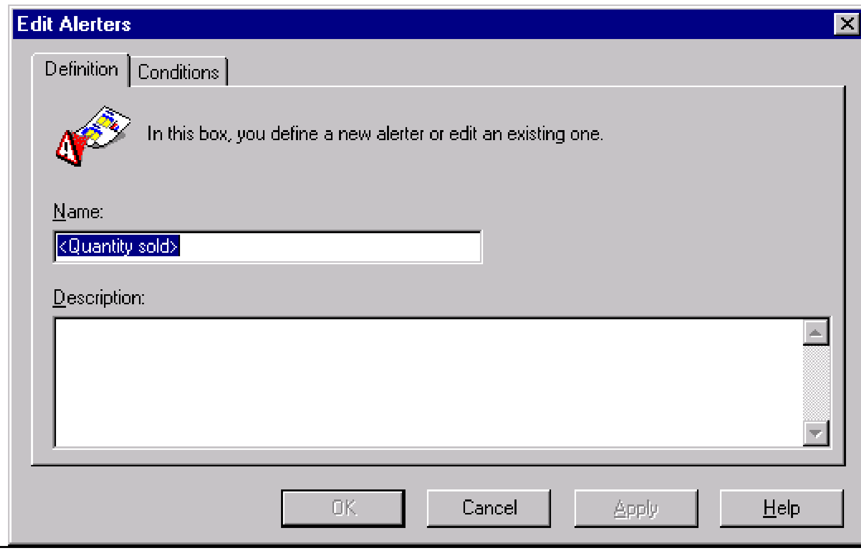
Procedure to Create Alerters With the Format Menu and the Report Toolbar (continued)

Step	Action
3	In the Alerters window, click Add. 

Continued on next page

Creating Alerters, Continued

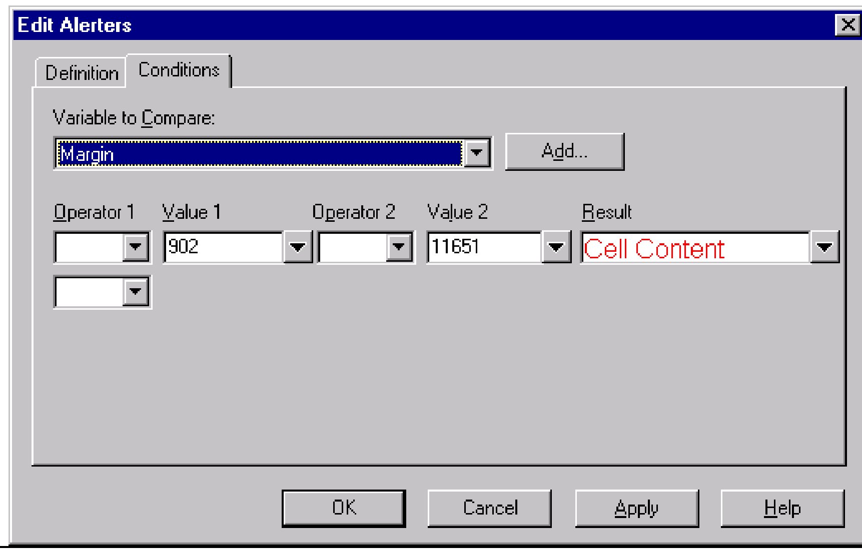
Procedure to Create Alerters With the Format Menu and the Report Toolbar (continued)

Step	Action
4	In the Edit Alerters window, click the Definition tab. 
5	In the Name box, type the name of the alerter.
6	If you want to add details about the alerter, in the Description box, type the description.
7	Click the Conditions tab.

Continued on next page

Creating Alerters, Continued

Procedure to Create Alerters With the Format Menu and the Report Toolbar (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>In the Variable to Compare box, select the object upon which you want to base the alerter.

</td></tr>
<tr><td>9</td><td>In the Operator 1 box, select the operator.</td></tr>
</table>

Continued on next page

Creating Alerters, Continued

Procedure to Create Alerters With the Format Menu and the Report Toolbar (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>In the Value 1 box, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to select a value from the list</td><td>a) Click the down arrow.
b) Click List of Values.
c) In the List of Values for <Name of Object> window, select the value.
d) Click OK.</td></tr>
<tr><td>You want to type a value</td><td>Type the value.
NOTE: For measure objects, do not use decimals or commas when typing; doing so produces an error.</td></tr>
<tr><td>You want to select a variable for the value</td><td>a) Click the down arrow.
b) Click Variables.
c) In the Variables window, select the variable.
d) Click Insert.</td></tr>
</table>
</td></tr>
<tr><td>11</td><td>Repeat steps 9 and 10 to select a second operator and value.
NOTE: It is possible to have 5 different alerter condition statements with 10 operators. If you do not want a second operator and value, you must select None on the second operator menu.</td></tr>
</table>

Continued on next page

Creating Alerters, Continued

Procedure to Create Alerters With the Format Menu and the Report Toolbar (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to change the format of the alerter</td><td>a) Click Format.
b) Follow the instructions in Unit 5 to format the alerter cell(s).</td></tr>
<tr><td>You want to enter text for the alerter</td><td>a) Click Text.
b) In the Enter Your Text window, enter the text.
c) Click OK.
NOTE: This text overwrites the value in the cell with the text you type.</td></tr>
</table>
</td></tr>
<tr><td>13</td><td>In the Edit Alerters window, click OK.</td></tr>
<tr><td>14</td><td>In the Alerters window, click OK.</td></tr>
</table>

Drilling Down

Introduction

In this topic, you will learn how to drill down through data.

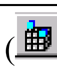
Description

Drilling is a tool that enables you to view your data from different perspectives in order to analyze the data better. Drilling only works on dimension objects, but any related measure objects aggregate with each drill level. The EAS IV Repository classes are set up so that the objects in them are hierarchically arranged, which is important for drilling. When you drill down you go from the highest point of data to its lowest related point. Drilling back up takes you in the opposite direction, from the many to the singular points of data. Drilling through enables you to add dimension objects to your report to increase the depth of your drill.

To prepare for drilling in a report, you must set up a Scope of Analysis in the Query Panel.

Procedure

The following table describes how to drill down in a report:

Step	Action
1	In the Query Panel – EAS IV Repository Universe window, create a query with result objects and/or conditions.
2	On the toolbar, in the Default Scope of Analysis box, click the down arrow.
3	Select the level of drilling that you want.
4	On the toolbar, click the Scope of Analysis icon ().

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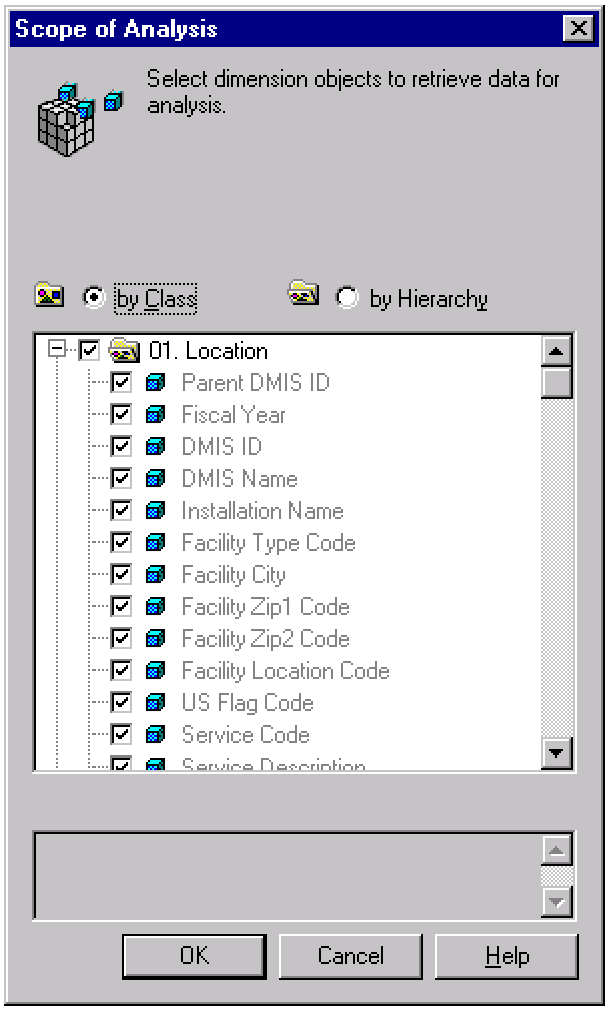
Drilling Down, Continued

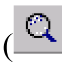
Procedure (continued)

Step	Action
5	In the Scope of Analysis window, click select by Class. 
6	Select any other dimension objects that you want to include in the drill.
7	Click OK.
8	Run the query.

Continued on next page

Drilling Down, Continued

Procedure (continued)

Step	Action
9	In the report, on the Analysis menu, click Drill. **NOTE:** You may also click the Drill icon () on the Standard toolbar.
10	Right-click the data section of a column.
11	On the menu, click Drill down. **NOTE:** To continue analysis, repeat steps 10 and 11 until you can not drill down further.

Drilling Up

Introduction

In this topic, you will learn how to drill up through data.

Description

Drilling up enables you to return up the hierarchical analysis, going from the lower details to the highest one.

Procedure

The following table describes how to drill up in a report:

Step	Action
1	In a report, in the data column you drilled down, right-click.
2	On the menu, click Drill up. **NOTE:** To complete the return to the top of the hierarchy, repeat steps 1 and 2 until you cannot drill up further.

Drilling Through

Introduction

In this topic, you will learn how to drill through data in a report.

Description

Drilling through enables you to add more data for your drill than that for which you originally allowed in your Scope of Analysis.

Procedure

The following table describes how to drill through in a report:

Step	Action
1	In a report using drill, right-click a data column.
2	On the menu, click Drill Through.
3	In the Drill Through window, select other dimension objects that you want to add to the drill.
4	Click OK.

UNIT 7
CHARTS AND CROSSTABS

Overview

Introduction

In this unit, you will learn about charts and crosstabs.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Work with charts in reports
- Work with crosstabs in reports

In this Unit

This unit includes the following lessons:

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LESSON A
CHARTS

Overview

Introduction

In this lesson, you will learn about charts.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Turn a table into a chart
- Insert a chart in a report
- Edit a chart

Order of Topics

This lesson includes the following topics:

Turning a Table Into a Chart

Introduction

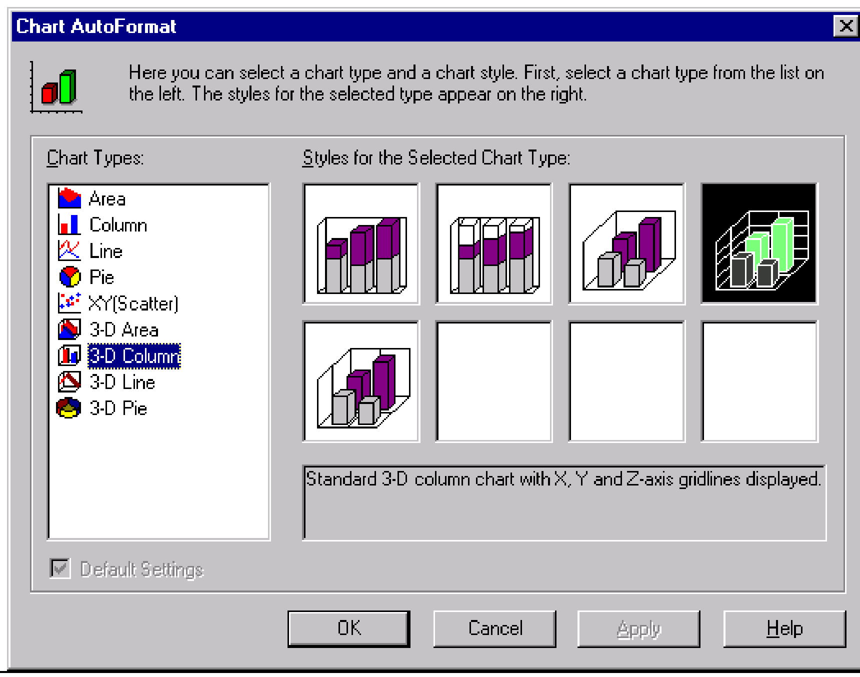
In this topic, you will learn how to turn a table into a chart. Business Objects 5.1.5 automatically formats the data from a table when you turn it into a chart. You can also reverse the process and turn a chart into a table.

Procedure

The following table describes how to turn a table into a chart:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select a table block.</td></tr>
<tr><td>2</td><td>On the Format menu, click Turn to Chart.

NOTE: You may also right-click and click Turn to Chart.</td></tr>
<tr><td>3</td><td>If you want to select a style other than the default, in the Chart AutoFormat window, in the Chart Types list, select a chart.



</td></tr>
<tr><td>4</td><td>Under Styles for the Selected Chart Type, select a style.</td></tr>
<tr><td>5</td><td>Click OK.</td></tr>
</table>

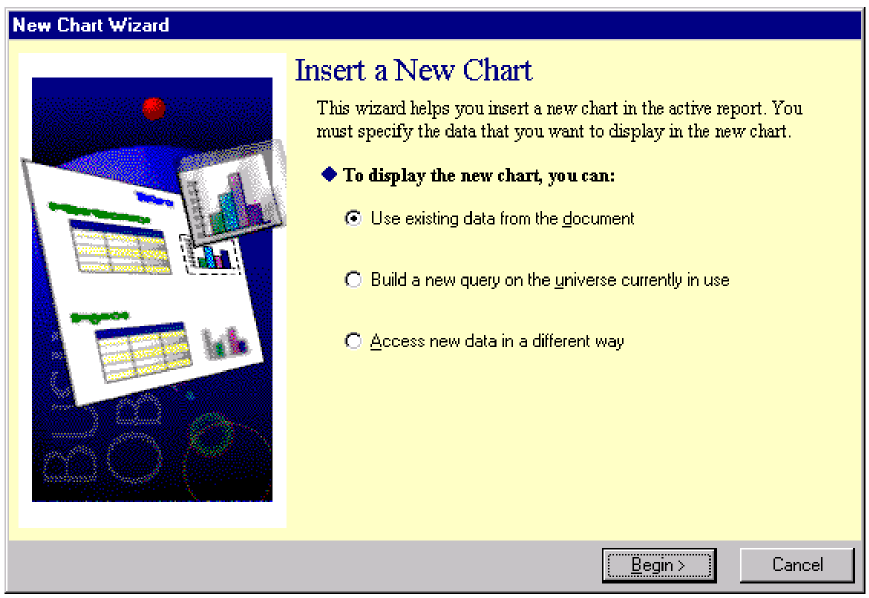
Inserting a Chart in a Report

Introduction

In this topic, you will learn how to insert a chart in a report.

Procedure

The following table describes how to insert a chart in a report:

Step	Action
1	In a report, on the Insert menu, click Chart. **NOTE:** You may also click the Insert Chart icon () on the Report toolbar.
2	In a clear area in the report, drag out a medium-sized area.
3	In the New Chart Wizard, Insert a New Chart window, do one of the following: 

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Inserting a Chart in a Report, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont.</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to create a chart based on the same query or one of the queries in the existing report</td><td>a) Click Use existing data from the document.
b) Click Begin.
c) In the second New Chart Wizard, Insert a New Chart window, in the Select the Variables list, select the variables you want in the chart.
d) Click Next.
e) In the Chart AutoFormat window, in the Chart Types list, select a chart.
f) Under Styles for the selected chart type, select a style.
g) Click Finish.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Inserting a Chart in a Report, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont.</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to create a chart based on a new query</td><td>a) Click Build a new query on the universe currently in use.
b) Click Finish.
c) Create the query.
d) Run the query.</td></tr>
<tr><td>You want to create a chart based on stored data such as an Excel report</td><td>a) Click Access new data in a different way.
b) In the New Chart Wizard, Specify Data Access window, click Others.
c) Click the down arrow.
d) In the list, select Personal data files.
e) Click Finish.
f) In the Access Personal Data window, retrieve the data.</td></tr>
</table>
</td></tr>
</table>

Editing a Chart

Introduction

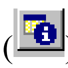
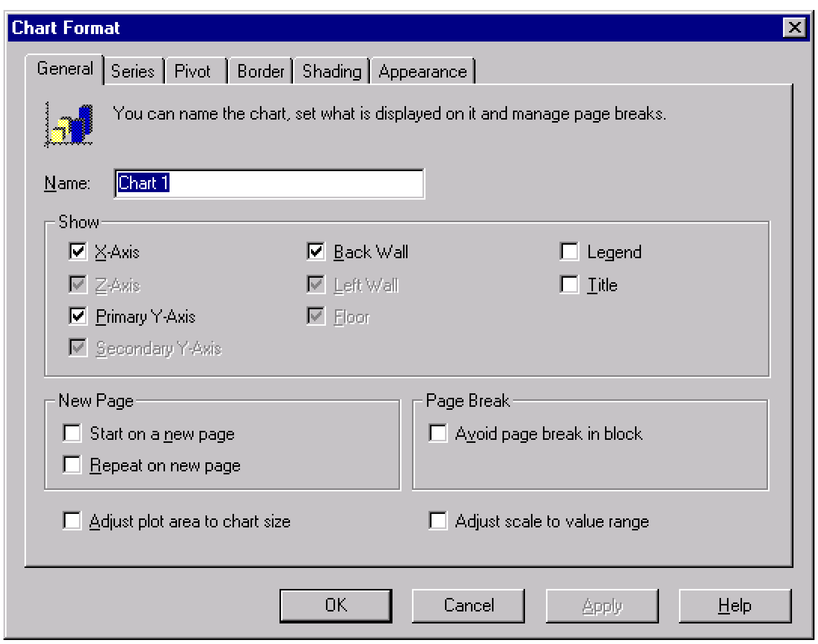
In this topic, you will learn how to edit charts.

Description

It is possible to make multiple changes to a chart after you create it. Some of these changes include modifying the chart type and style, adding legends, changing the borders and shading, and adding and removing objects.

Procedure

The following table describes how to edit a chart:

Step	Action
1	In a report, select the chart you want to edit.
2	On the Format menu, click Edit Chart. **NOTE:** You may also click the Format Block icon ().
3	In the Chart Format window, make your changes. 
4	Click OK.

LESSON B
CROSSTABS

Overview

Introduction

In this topic, you will learn about crosstabs.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Change a table into a crosstab
- Insert a crosstab
- Edit a crosstab

Order of Topics

This lesson includes the following topics:

Changing a Table Into a Crosstab

Introduction

In this topic, you will learn how to change a table into a crosstab.

Description

A crosstab is made up of three main parts: The left columns, the body, and the header row.

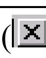
Procedure to Turn a Table Into a Crosstab

The following table describes how to turn a table into a crosstab:

Step	Action
1	In a report, select the data portion of a dimension object column.
2	Drag and drop to the header level of the next column. **NOTE:** When the cursor turns into a crosshair you should drop the object.

Procedure to Turn a Table Into a Crosstab With Slice and Dice

The following table describes how to turn a table into a crosstab with Slice and Dice:

Step	Action
1	In a report, click the Slice and Dice icon ().
2	In the Slice and Dice Panel window, in the Block Structure section, drag a dimension object above the dotted line. **NOTE:** When the cursor turns into a crosshair you should drop the object.
3	Click Apply.
4	Click the Close Window icon ().

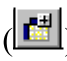
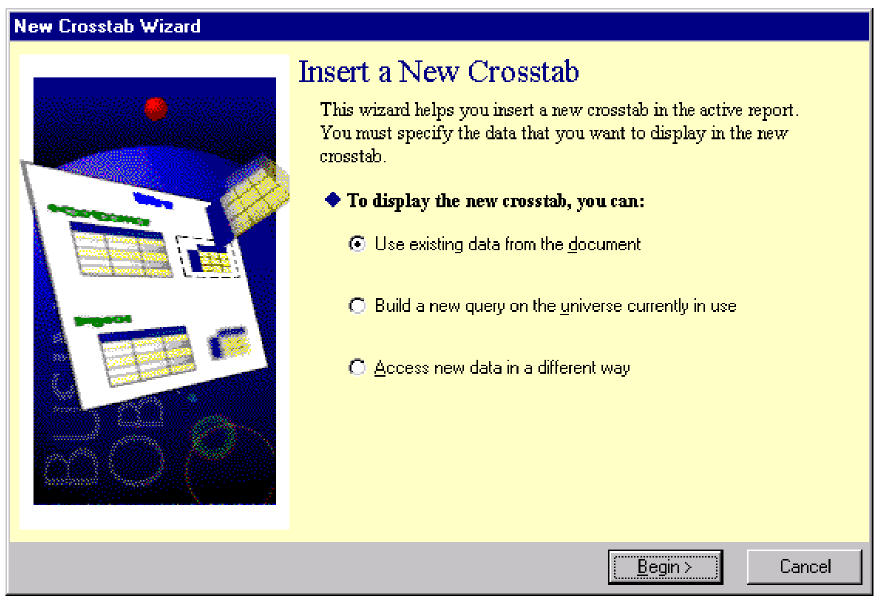
Inserting a Crosstab

Introduction

In this topic, you will learn how to insert a crosstab in a report.

Procedure

The following table describes how to insert a crosstab into a report:

Step	Action
1	On the Insert menu, click Crosstab. **NOTE:** You may also click the Insert Crosstab icon (). The crosstab symbol with crosshairs above it appears.
2	In a clear area in the report, drag out a medium-sized area.
3	In the New Crosstab Wizard, Insert a New Crosstab window, do one of the following: 

Continued on next page

Inserting a Crosstab, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont.</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to create a crosstab based on the same query or on one of the queries in the existing report</td><td>a) Click Use existing data from document.
b) Click Begin.
c) In the second New Crosstab Wizard, Insert a Crosstab window, in the Variables list, select the variables you want in the crosstab.
NOTE: You must choose at least three variables.
d) Click Next.
e) In the New Crosstab Wizard, Pivot Data for the Crosstab window, drag at least one variable to each folder.
f) Click Finish.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Inserting a Crosstab, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont.</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to create a crosstab based on a new query</td><td>a) Click Build a new query on the universe currently in use.

b) Click Finish.</td></tr>
<tr><td>You want to create a crosstab based on stored data such as an Excel report</td><td>a) Click Access new data in a different way.

b) In the New Crosstab Wizard, Specify Data Access window, click Others.

c) Click the down arrow.

d) In the list, select Personal data files.

e) Click Finish.

f) In the Access Personal Data window, retrieve the data.</td></tr>
</table>
</td></tr>
</table>

Editing a Crosstab

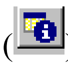
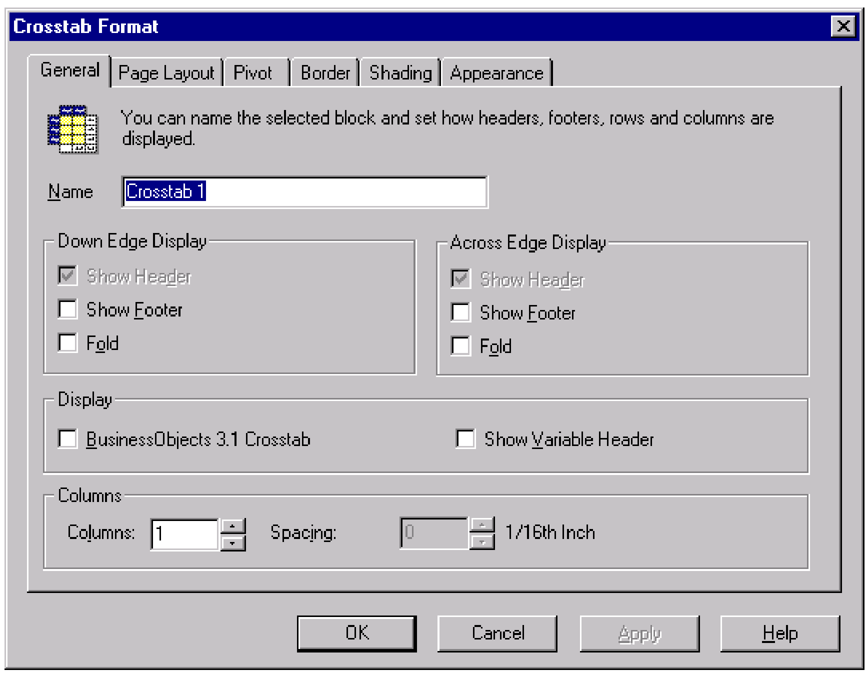
Introduction

In this topic, you will learn how to edit a crosstab.

Procedure

The following table describes how to edit a crosstab:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, select the crosstab.</td></tr>
<tr><td>2</td><td>On the Format menu, click Crosstab.

NOTE: You may also click the Format Block icon ().</td></tr>
<tr><td>3</td><td>In the Crosstab Format window, make your edits.

</td></tr>
<tr><td>4</td><td>Click OK.</td></tr>
</table>

UNIT 8
TEMPLATES

Overview

Introduction

In this unit, you will learn about templates.

Unit Objective

Upon completion of this unit, you will be able to work with templates.

In This Unit

This unit includes the following lesson:

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LESSON A
TEMPLATES

Overview

Introduction

In this lesson, you will learn about templates. You can create your own template or change the standard template style.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Save a template to the available templates list
- Apply a template to a report
- Modify the standard report style

Order of Topics

This lesson includes the following topics:

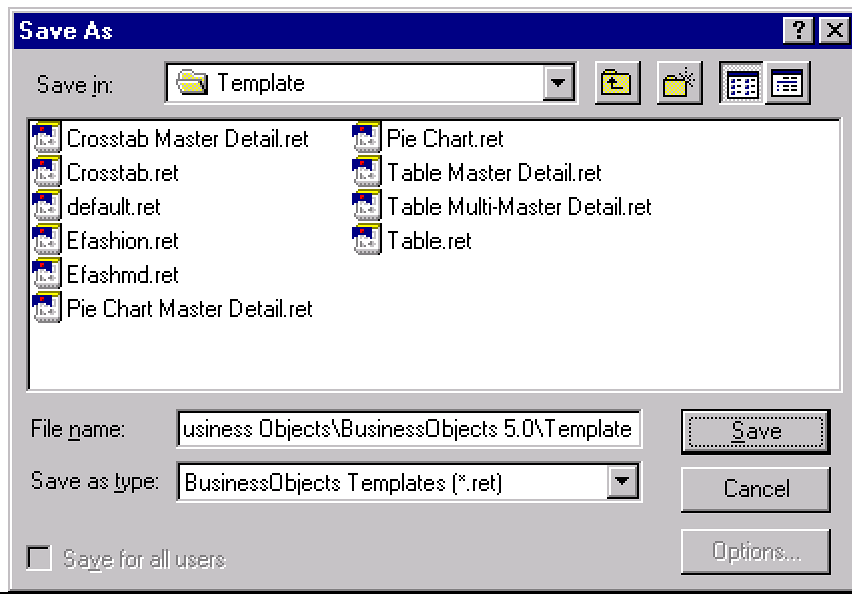
Saving a Template

Introduction

In this topic, you will learn how to save a template. You can create a report style that you may wish to use again. To do so, you save the template. Then you can start new reports in the template format.

Procedure

The following table describes how to save a template:

Step	Action
1	In the report you want to use as a template, on the File menu, click Save As.
2	In the Save As window, in the File name box, type a file name.
3	In the Save as type box, select Business Objects Templates (*.ret). 
4	Click Save.

Applying a Template

Introduction

In this topic, you will learn how to apply a template to a report. Applying a template means that you can change the format of a report to that of the template you select.

Procedure

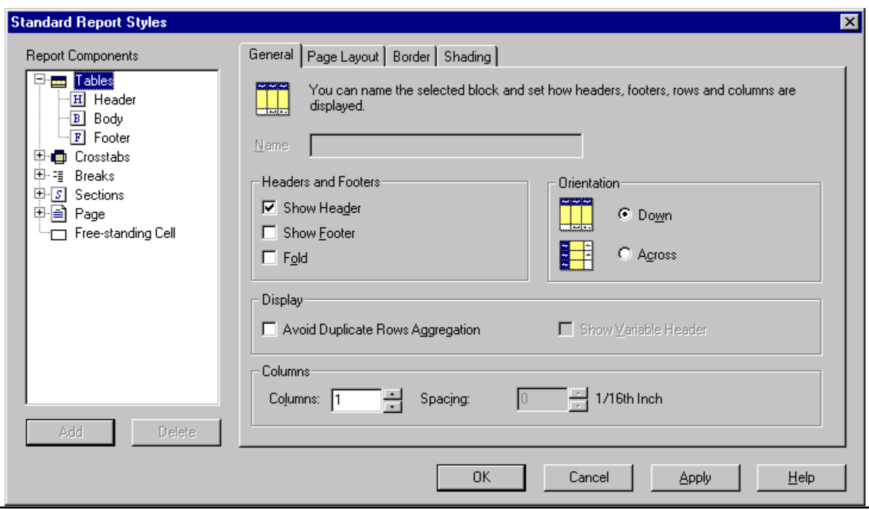
The following table describes how to apply a template to a report:

Step	Action
1	In a report, on the Format menu, point to Report, and then click Apply Template.
2	In the Apply a Template, Select a Template window, select the template you want.
3	Click OK.

Modifying the Standard Report Style

Introduction In this topic, you will learn how to change the standard report style.

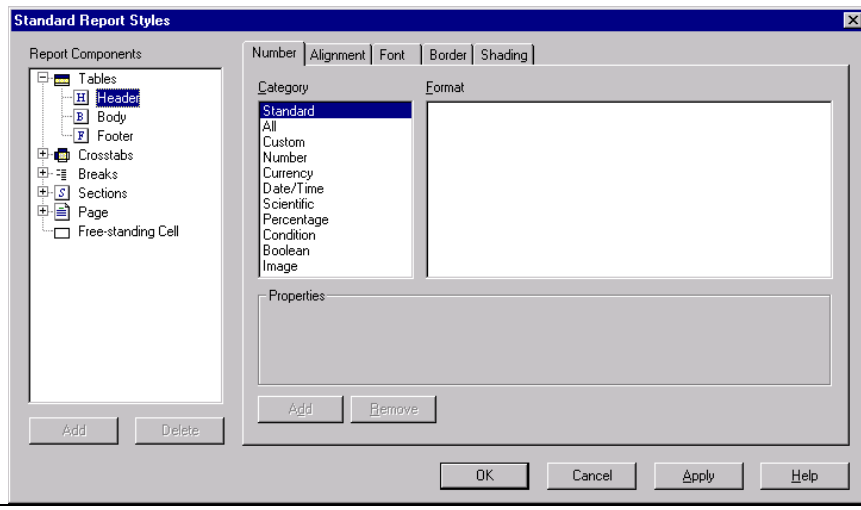
Procedure The following table describes how to change the standard report style.

Step	Action
1	In a report, on the Tools menu, click Standard Report Styles.
2	In the Standard Report Styles window, under Report Components, click the plus icon (+) next to the block style you want to format. 
3	Make your modifications.

Continued on next page

Modifying the Standard Report Style, Continued

Procedure (continued)

Step	Action
4	Under Report Components, in the list, click the plus icon (+) next the block that you want to change. 
5	Select the section of the block you want to change.
6	Make your modifications.
7	Click OK.

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UNIT 9
SENDING DOCUMENTS

Overview

Introduction

In this unit, you will learn about sending reports to other applications and how to use the Broadcast Agent.

Unit Objectives

Upon completion of this unit, you will be able to do the following:

- Describe the various ways to send reports
- Send reports to other applications
- Use Document Exchange

In This Unit

This unit includes the following lessons:

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LESSON A
ABOUT SENDING REPORTS

Overview

Introduction

In this lesson, you will learn about sending reports to other applications and about using Document Exchange, which enables you to send documents to other users, to corporate documents, or to schedule documents to be sent.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Describe sending reports to other applications
- Describe using Document Exchange

Order of Topics

This lesson includes the following topics:

Sending Reports to Applications

Introduction

In this topic, you will learn about sending reports to other applications.

Description

Business Objects 5.1.5 enables you to export reports to applications such as Word or Excel. This is helpful if, for example, you need to send data that you gathered from the EAS IV Repository to someone who does not have Business Objects software. It is important to note that Business Objects only sends one query and one report per query at a time. You have to export each report per document individually. Also, most formatting is lost in the transfer.

There are two different ways to send reports to other applications, by the simple copy and paste method, or by a more complex Data Manager export method. Both end with similar results.

Sending Documents by Document Exchange

Introduction

In this topic, you will learn about sending documents by Document Exchange.

Description

Document Exchange enables Business Objects users to publish documents to a server, to place users in user groups, or to schedule document transmissions. For example, if one Service member is responsible for creating salary expense reports for other Service members at several sites, those reports could be published with Document Exchange. They might be sent to Corporate Documents, where all Business Objects EAS IV Repository users could access them, or they might go only to users in a particular user group.

In addition, Document Exchange has a feature called Broadcast Agent, which automatically schedules and publishes your document at the time you specify. This means you could send a document once or you could send it on a regular basis, refreshed, and to a specific user group. For example, if you have to send out the same report every Friday morning, Broadcast Agent will do it for you.

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LESSON B
EXPORTING A REPORT TO AN APPLICATION

Overview

Introduction

In this topic, you will learn how to export a document to other applications.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Export a report through Data Manager
- Copy and paste a report into another application

Order of Topics

This lesson includes the following topics:

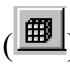
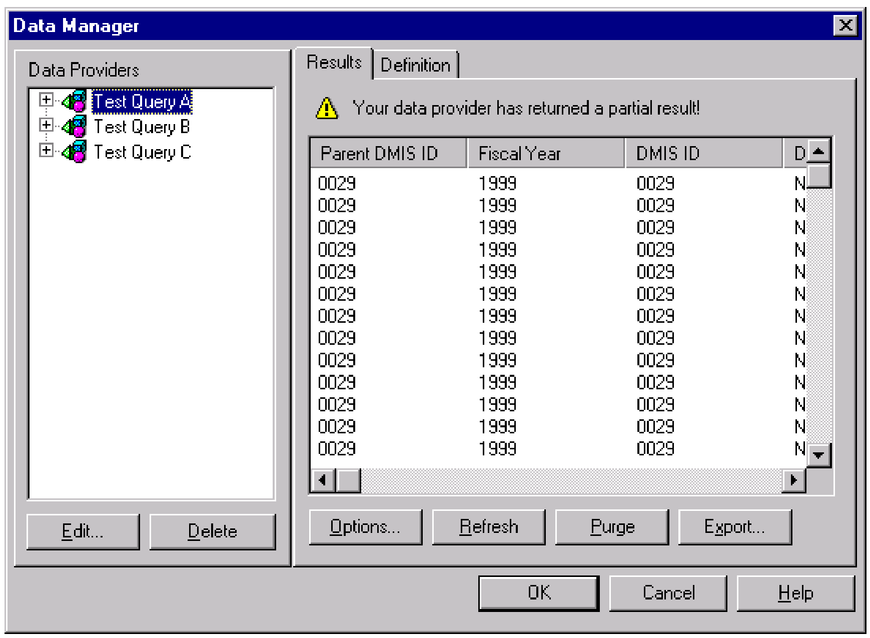
Exporting a Report

Introduction

In this topic, you will learn how to export a report to another application.

Procedure

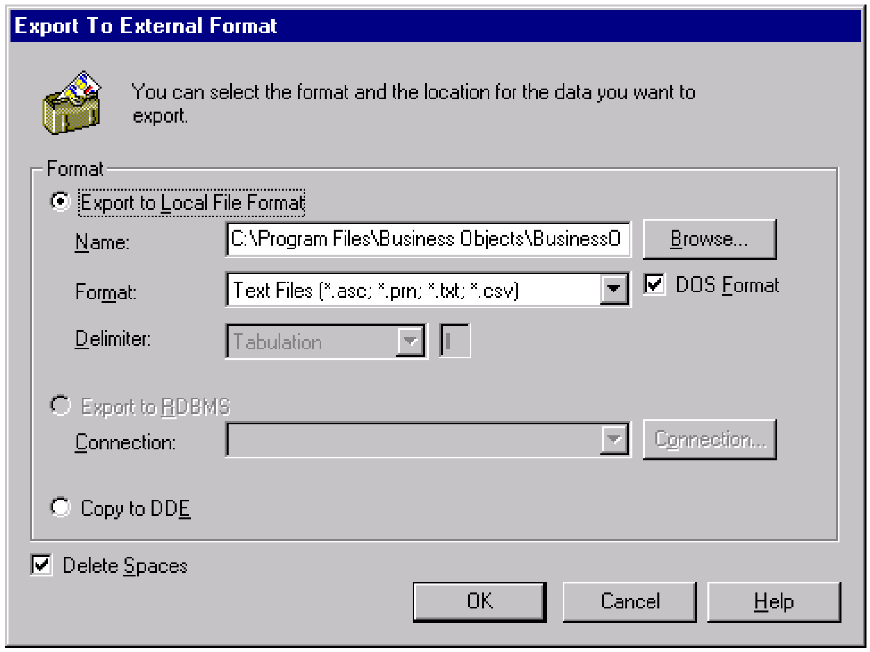
The following table describes how to export a report to another application:

Step	Action
1	In the report, on the Data menu, click View Data. **NOTE:** You may also click the View Data icon ().
2	In the Data Manager window, under Data Providers, select the query that you want to export.  **NOTE:** It is important that you renamed the query in order to export and save the data correctly. See *Using the Data Manager Through the Query Panel* in section 4.
3	On the Results tab, click Export.

Continued on next page

Exporting a Report, Continued

Procedure (continued)

Step	Action
4	In the Export to External Format window, under Format, in the Format box, click the down arrow. 
5	Select the file format of the application to which you will export.
6	Click Browse.
7	In the Export to Local File Format window, in the File name box, name your file.
8	Choose the location in which to save the file.
9	Click Save.
10	In the Export to External Format window, click OK.
11	In the Business Objects message window indicating that the export was successful, click OK.
12	In the Data Manager window, click OK.

Copying a Report to Another Application

Introduction

In this topic, you will learn how to copy a report and paste it in another application.

Procedure

The following table describes how to copy a report and paste it in another application:

Step	Action
1	In a report that you want to export, on the Edit menu, click Copy All.
2	In the target application to which you want to export data, open a file.
3	On the Edit menu, click Paste.

LESSON C
USING DOCUMENT EXCHANGE

Overview

Introduction

In this lesson, you will learn how to use Document Exchange.

Lesson Objective

Upon completion of this lesson, you will able to do the following:

- Send documents to Users
- Retrieve documents from Users
- Send documents to Corporate Documents
- Retrieve documents from Corporate Documents
- Send documents to Broadcast Agent
- Retrieve documents from Broadcast Agent

Order of Topics

This lesson includes the following topics:

Sending a Document to a User

Introduction

In this topic, you will learn how to send a document to a user.

Description

Sending a document to a user simply means that you send a query, report, or document of your creation to other Business Objects 5.1.5 users. The Business Objects system administrator must create user groups or user names for you to access when sending these documents.

Procedure

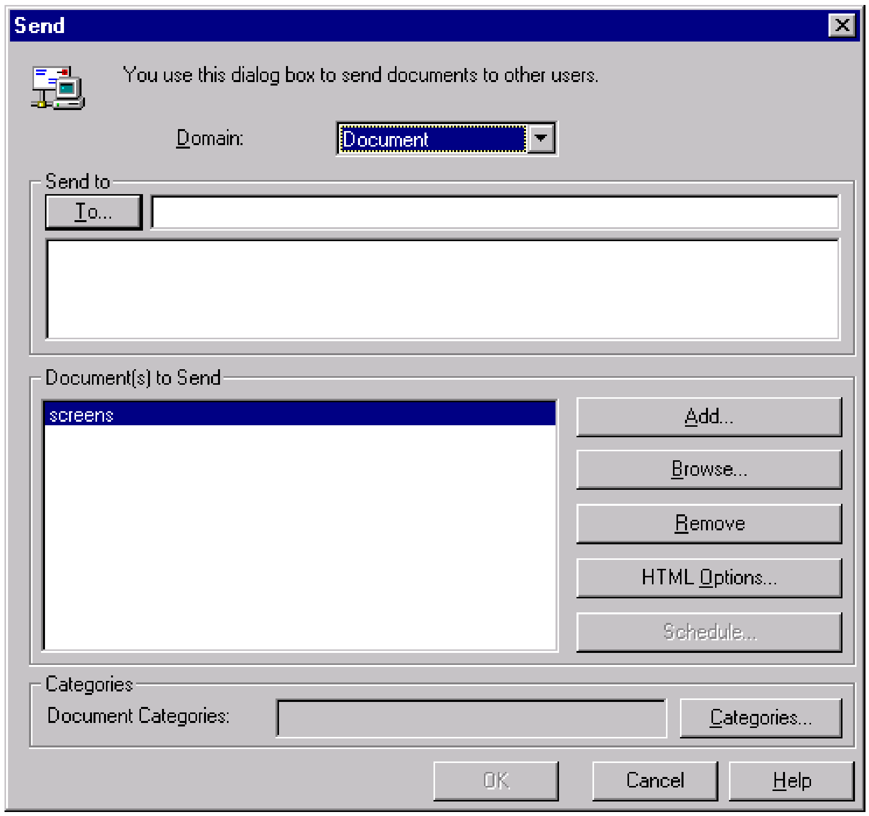
The following table describes how to send a document to a user:

Step	Action
1	In the Business Objects window, on the File menu, point to Send to, and then click Users. **NOTE:** You may also click the Send to Users icon () on the Document Exchange toolbar.

Continued on next page

Sending a Document to a User, Continued

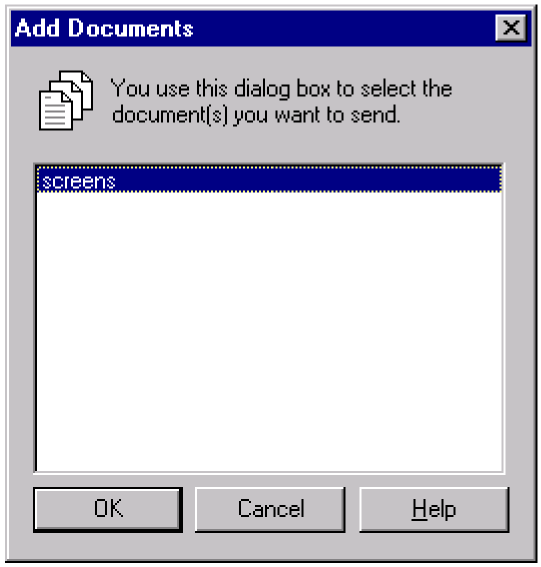
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>In the Send window, in the To box, type the group name of the users to whom you want to send the document.

</td></tr>
<tr><td>3</td><td>Under Document(s) to Send, verify that the correct document is listed.</td></tr>
<tr><td>4</td><td>If you need to add a document, click Add.</td></tr>
</table>

Continued on next page

Sending a Document to a User, Continued

Procedure (continued)

Step	Action
5	In the Add Documents window, in the list, select the document(s). 
6	Click OK.
7	If you want to retrieve a document stored in another location, click Browse.
8	In the Select the File to Send window, select the document.
9	Click Add.
10	If you want to remove a document from the list, click Remove.
11	Click OK.
12	In the Results window, click OK.

Retrieving a Document From a User

Introduction

In this topic, you will learn how to retrieve a document from a user.

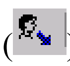
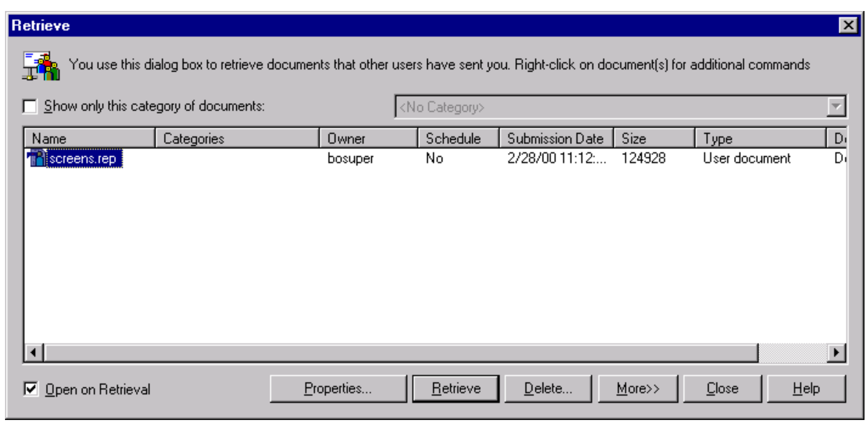
Description

If a Business Objects EAS IV Repository user sends a document to a user group of which you are a member; you will receive notification of reception. You then need to retrieve the document in order to view it.

Procedure

The following table describes how to retrieve a document from a user:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Business Objects window, on the File menu, point to Retrieve, and then click from Users.

NOTE: You may also click the Retrieve from Users icon () on the Document Exchange toolbar.</td></tr>
<tr><td>2</td><td>In the Retrieve window, in the document list, select the document you want to retrieve.

</td></tr>
<tr><td>3</td><td>Click Retrieve.</td></tr>
</table>

Continued on next page

Retrieving a Document From a User, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>In the Replace window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to over-write the existing document</td><td>Click Yes.</td></tr>
<tr><td>If you do not want to over-write the existing document</td><td>a) Click No.
b) In the Change the File name window, in the File name box, rename the document.
c) Click Save.</td></tr>
</table></td></tr>
<tr><td>5</td><td>In the Import Results window, click OK.</td></tr>
</table>

Sending a Document to Corporate Documents

Introduction

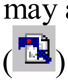
In this topic, you will learn how to send a document to Corporate Documents.

Description

Sending a document to Corporate Documents publishes the document so that any Business Objects 5.1.5 EAS IV Repository user may retrieve the document to view or to update.

Procedure

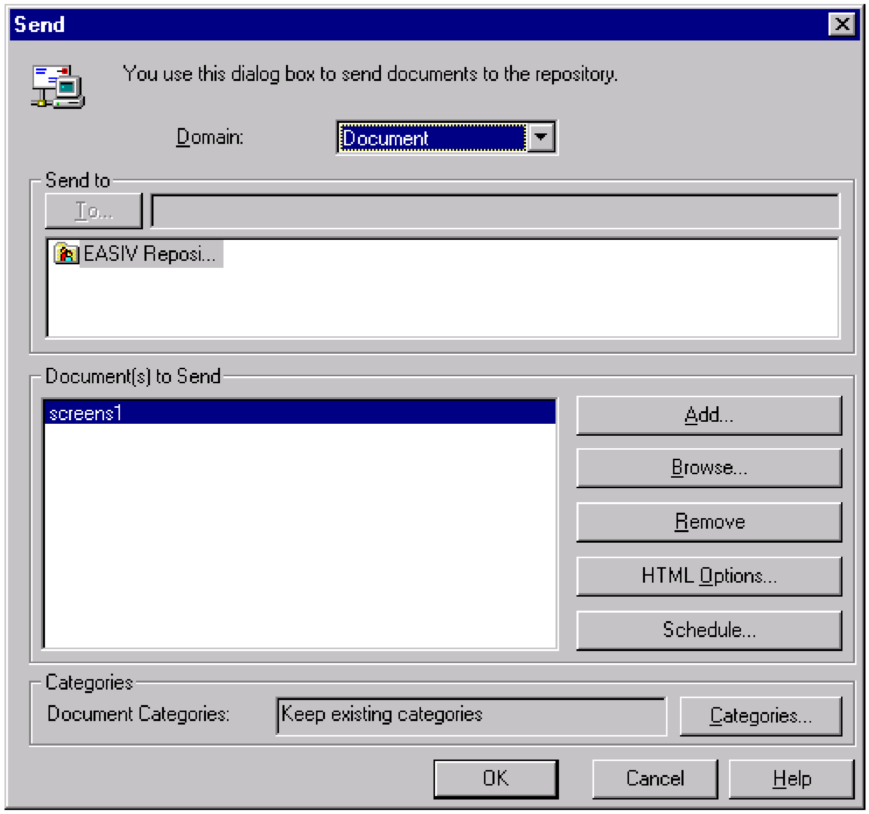
The following table describes how to send a document to Corporate Documents:

Step	Action
1	In the Business Objects window, on the File menu, point to Publish to, and then click Corporate Documents. **NOTE:** You may also click the Publish to Corporate Documents icon () on the Document Exchange toolbar.

Continued on next page

Sending a Document to Corporate Documents, Continued

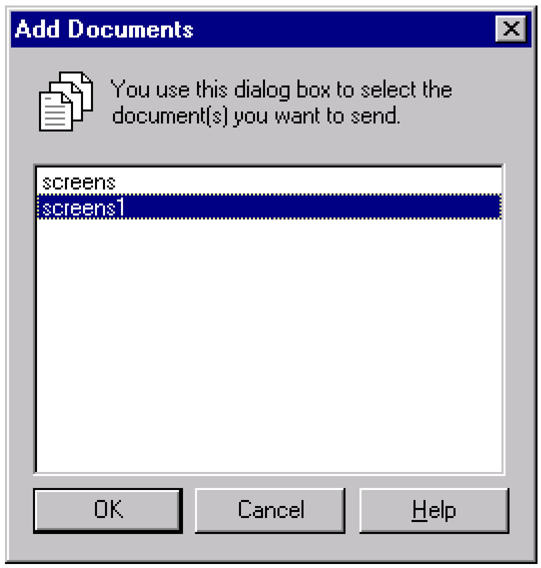
Procedure (continued)

Step	Action
2	In the Send window, under Document(s) to Send, verify that the document you want to send is in the list. 

Continued on next page

Sending a Document to Corporate Documents, Continued

Procedure (continued)

Step	Action
3	If you want to Add a document, click Add. 
4	In the Add Documents window, in the list, select the document(s).
5	Click OK.
6	If you want to retrieve a document stored in another location, click Browse.
7	In the Select the File to Send window, select the document.
8	Click Add.
9	If you want to remove a document, click Remove.
10	Click OK.
11	In the Results window, click OK.

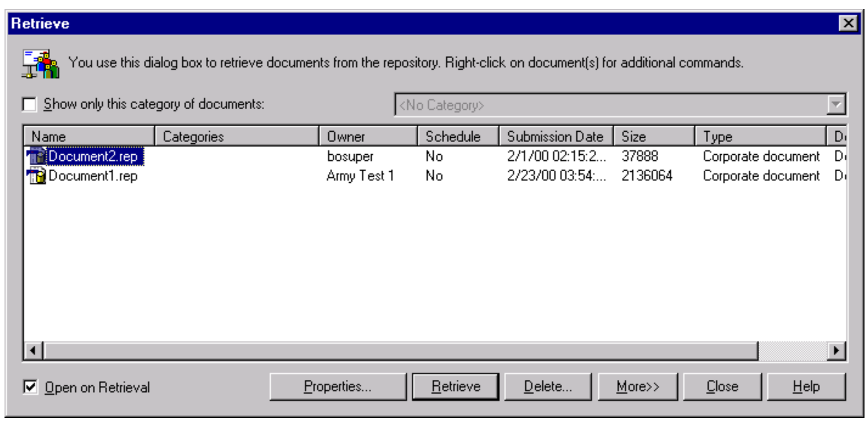
Retrieving a Document From Corporate Documents

Introduction

In this topic, you will learn how to retrieve a document from Corporate Documents.

Procedure

The following table describes how to retrieve a document from Corporate Documents:

Step	Action
1	In the Business Objects window, on the File menu, point to Retrieve From, and then click Corporate Documents. **NOTE:** You may also click the Retrieve from Corporate Documents icon () on the Document Exchange toolbar.
2	In the Retrieve window, in the document list, select the document you want to retrieve. 
3	Click Retrieve.

Continued on next page

Retrieving a Document From Corporate Documents, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>In the Replace window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to over-write the existing document</td><td>Click Yes.</td></tr>
<tr><td>If you do not want to over-write the existing document</td><td>a) Click No.
b) In the Change the File name window, in the File name box, rename the document.
c) Click Save.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>In the Import Results window, click OK.</td></tr>
</table>

Sending a Document to Broadcast Agent

Introduction

In this topic, you will learn how to send a document to Broadcast Agent.

Description

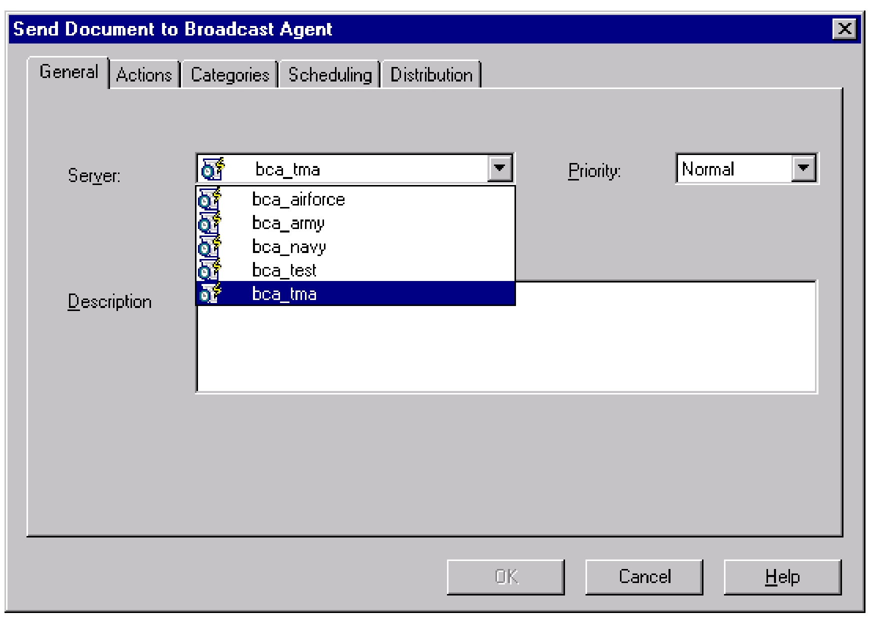
Broadcast Agent enables you to schedule documents for processing and distribution.

Procedure

The following table describes how to send a document using Broadcast Agent:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, on the File menu, point to Send To, and then click Broadcast Agent.

NOTE: You may also click the Sent to Broadcast Agent icon () on the Document Exchange toolbar.</td></tr>
<tr><td>2</td><td>In the Send Document to Broadcast Agent window, in the Server box, click the down arrow.

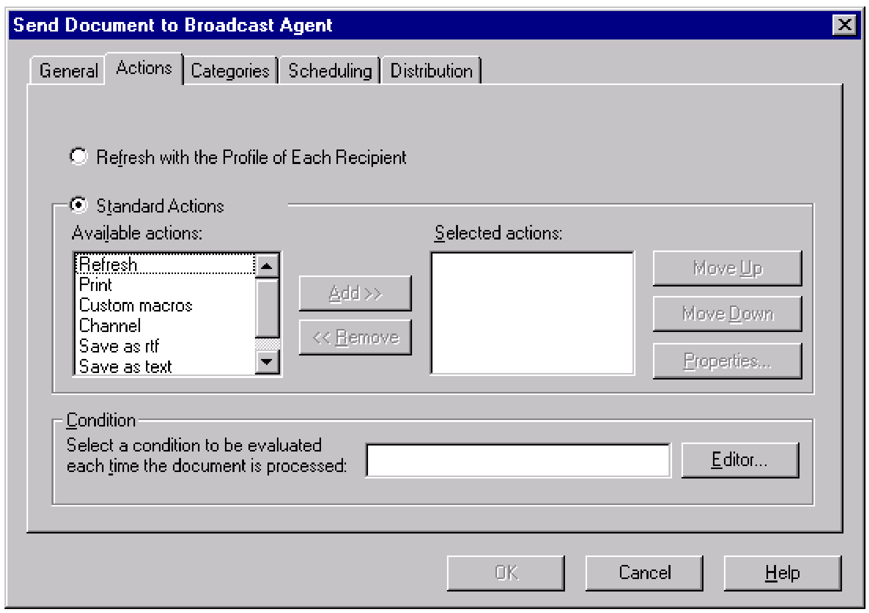

</td></tr>
</table>

Continued on next page

Sending a Document to Broadcast Agent, Continued

Procedure (continued)

Step	Action
3	In the list, select the server name you want.
4	If you want to set a priority other than normal, in the Priority box, click the down arrow.
5	In the list, select a priority.
6	Click the Actions tab.
7	Under Standard Actions, in the Available actions list, select any actions that you want.

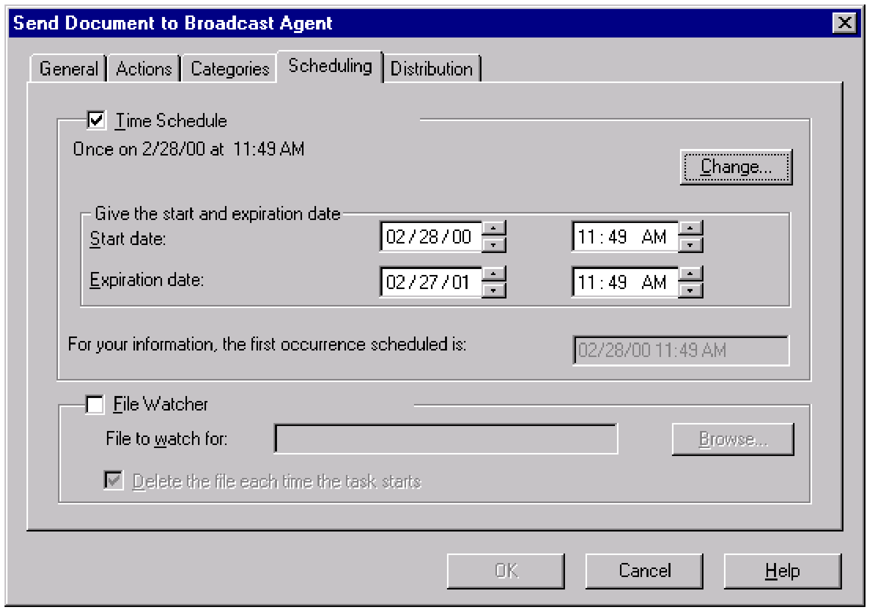


Step	Action
8	Click Add.
9	Click the Scheduling tab.

Continued on next page

Sending a Document to Broadcast Agent, Continued

Procedure (continued)

Step	Action
10	If you want to schedule the document to send other than one time, click Change. 
11	In the Change Schedule window, under Run, click the frequency you want.
12	Under Start At, fill in the corresponding information.
13	Click OK.
14	In the Send Document to Broadcast Agent window, click OK.

Retrieving a Document From Broadcast Agent

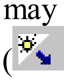
Introduction

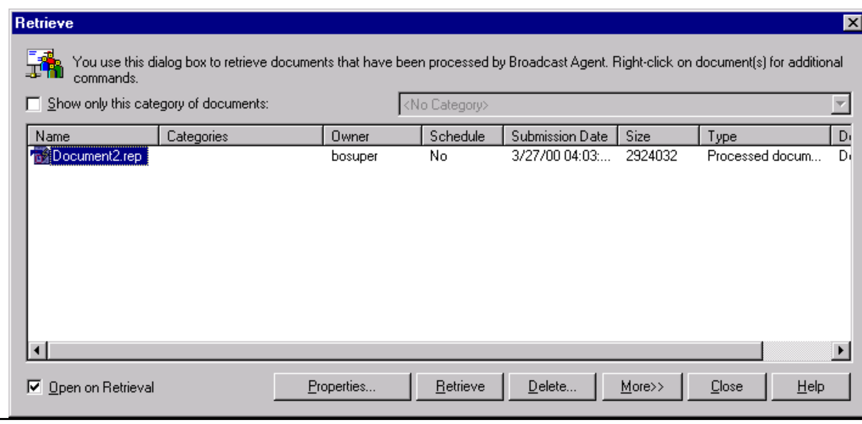
In this topic, you will learn how to retrieve a document from Broadcast Agent.

Procedure

The following table describes how to retrieve a document from Broadcast Agent:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In a report, on the File menu, point to Retrieve From, and then click Broadcast Agent.

NOTE: You may also click the Retrieve from Broadcast Agent icon () on the Document Exchange toolbar.</td></tr>
<tr><td>2</td><td>In the Retrieve window, in the document list, select the document you want to retrieve.



</td></tr>
<tr><td>3</td><td>Click Retrieve.</td></tr>
</table>

Continued on next page

Retrieving a Document From Broadcast Agent, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>In the Replace window, do one of the following:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You want to over-write the existing document</td><td>Click Yes.</td></tr>
<tr><td>If you do not want to over-write the existing document</td><td>a) Click No.
b) In the Change the File name window, in the File name box, rename the document.
c) Click Save.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>In the Import Results window, click OK.</td></tr>
</table>

UNIT 10
WORKSTATION INSTALLATION

Overview

Introduction

In this unit, you will learn how to install the software required to run the EAS IV Repository on a client workstation.

Unit Objective

Upon completion of this unit, you will be able to do the following:

- Install Informix Client Connect software on a workstation
- Configure Informix Client Connect software on a workstation
- Install Business Objects 5.1.5 on a workstation
- Configure Business Objects 5.1.5 workstation software to allow access to the EAS IV Repository

In This Unit

This unit includes the following lessons:

INSTALLATION CHECKLIST

Introduction

In this topic, you will learn about hardware, software, and security requirements that you must gather before you begin installation. Be sure to obtain the products or information listed in the steps before beginning installation.

Procedure

Verify that you have all of the items in the following table before beginning installation:

Workstation Hardware	✓
A 200 MHz Pentium computer with 3.1 GB hard drive capacity and CD-ROM or equivalent, and a minimum of 64 megabytes (MB) of random access memory (RAM)	
A compatible monitor, keyboard, and mouse	
Workstation Software	
Preloaded Windows NT 4.0 with Service Pack 5 and Windows NT Workstation Resource Kit (preferred) (Optional Windows 95 or 98)	
Business Objects 5.1.5	
Informix Client Connect 9.1.4 or higher	
EAS IV Repository floppy disk with Bomain key	
Installation Items	
EAS IV Repository Functional User's Guide or *Using the EAS IV Repository*	
EAS IV Repository Security Packet	
Administrator ID and password for the workstation operating system	
User ID and password for the workstation operating system	
User ID and password for the EAS IV Repository	

LESSON A
INSTALLING AND CONFIGURING INFORMIX CLIENT CONNECT SOFTWARE

Overview

Introduction

In this lesson, you will learn how to install and configure Informix Client Connect, Version 9.1.4 or greater, on a client workstation. Informix Client Connect resides on a workstation and provides an application-level connection to the HP-UX Informix Dynamic Server (IDS), a relational database engine that enables the EAS IV Repository HP-UX and Windows NT servers to maintain a highly sophisticated collection of data. The IDS houses all the EAS IV Repository data.

NOTE: Any references to installation drive letters are the suggested drives to use; however, you may install on the drive of your choice.

Lesson Objectives

Upon completion of this lesson, you will be able to do the following:

- Verify or add a service port number
- Set up the Hosts file
- Install Informix Client Connect on a client workstation
- Configure Informix Client Connect on a client workstation
- Test workstation connectivity to the database

Order of Topics

This lesson includes the following topics:

Verifying or Adding a Service Port Number

Introduction

In this topic, you will learn how to verify or add a service port number.

Procedure

The following table describes how to verify or add a service port number:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log on to the client workstation as an administrator under the local machine name.</td></tr>
<tr><td>2</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>The operating system is Windows NT</td><td>a) Click Start, point to Programs, and then click Windows NT Explorer.
b) In the Exploring window, open the C:\Winnt\system32\ drivers\etc folder.
c) In the etc folder, double-click the Services file.</td></tr>
<tr><td>The operating system is Windows 95 or 98</td><td>a) Click Start, point to Programs, and then click Windows Explorer.
b) In the Explorer window, open C:\Services\etc.
c) In the etc folder, double-click the Services file.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Verifying or Adding a Service Port Number, Continued

Procedure (continued)

Step	Action
3	In the Open With window, select NOTEPAD.
4	Click OK.
5	In the Services-Notepad window, on the Search menu, click Find.
6	In the Find window, type the service file name listed under Service File Information in *the EAS IV Repository Security Packet*.
7	Under Direction, click Down.

Continued on next page

Verifying or Adding a Service Port Number, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Click Find Next.</td></tr>
<tr><td>9</td><td><table><tr><th>If</th><th>Then</th></tr><tr><td>The Find functions finds sqlexec 1540/tcp</td><td>a) In the Find window, click Cancel.
b) Go to step 23.</td></tr><tr><td>The message, Cannot find "sqlexec," appears</td><td>Go to step 10.</td></tr></table></td></tr>
<tr><td>10</td><td>In the Notepad window, click OK.</td></tr>
<tr><td>11</td><td>In the Find window, select sqlexec.</td></tr>
<tr><td>12</td><td>Type maze.</td></tr>
<tr><td>13</td><td>Click Find Next.</td></tr>
<tr><td>14</td><td>Click Cancel.</td></tr>
<tr><td>14</td><td>In the Notepad-Services window, place the cursor to the left of the line: maze 1666/udp.</td></tr>
<tr><td>15</td><td>Press Enter.</td></tr>
<tr><td>16</td><td>Place the cursor at the beginning of the blank line above maze 1666/udp.</td></tr>
<tr><td>17</td><td>Type the service file name listed under Service File Information in the EAS IV Repository Security Packet.</td></tr>
<tr><td>18</td><td>Align the cursor with the port number column.</td></tr>
<tr><td>19</td><td>Type the port number and protocol listed under Service File Information in the EAS IV Repository Security Packet.</td></tr>
<tr><td>20</td><td>Align the cursor with the comment column.</td></tr>
</table>

Continued on next page

Verifying or Adding a Service Port Number, Continued

Procedure (continued)

Step	Action
21	Type **# MEQS III and EAS IV Repository**.
22	On the File menu, click Save.
23	On the File menu, click Exit.

Setting Up the Hosts File

Introduction

In this topic, you will learn how to set up the Hosts file.

Procedure

The following table describes how to set up the Hosts file:

Step	Action
1	In the Exploring window, in the etc folder, double-click the Hosts file.
2	In the Open With window, double-click Notepad.
3	In the Hosts-Notepad window, under For example, in the IP address column, type the IP address for the first EAS IV Repository server listed under Host File Information in the *EAS IV Repository Security Packet*.
4	Tab to the server name column, and type the first server name listed under Host File Information in the *EAS IV Repository Security Packet*.
5	Tab to the IP name column, and type the IP name for the first server listed under the Host File Information in the *EAS IV Repository Security Packet*.
6	Press Enter.
7	In the IP address column, type the IP address for the second server name listed under Host File Information in *the EAS IV Repository Security Packe*t.
8	Tab to the server name column, and type the second server name listed under Host File Information in the *EAS IV Repository Security Packet*.
9	Tab to the IP name column, and type the IP name for the second server listed under Host File Information in the *EAS IV Repository Security Packet*.
10	Press Enter.

Continued on next page

Setting Up the Hosts File, Continued

Procedure (continued)

Step	Action
11	In the IP address column, type the IP address for the third server name listed under Host File Information in the *EAS IV Repository Security Packet*.
12	Tab to the server name column, and type the third server name listed under Host File Information in the *EAS IV Repository Security Packet*.
13	Tab to the IP name column, and type the IP name for the third server listed under Host File Information in the *EAS IV Repository Security Packet*.
14	On the File menu, click Save.
15	On the File menu, click Exit.

Installing Informix Client Connect

Introduction

In this topic, you will learn how to install Informix Client Connect.

NOTE: You only need to install this version of Informix if you currently do not have this version on your workstation.

Prerequisite

You must be logged on to the client workstation as an administrator under the local machine name.

Procedure

The following table describes how to install Informix Client Connect:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Place the Informix CD-ROM in the CD-ROM drive.</td></tr>
<tr><td>2</td><td><table><tr><th>If</th><th>Then</th></tr><tr><td>The operating system is Windows NT</td><td>a) Right-click Start, and then click Explore.
b) In the Exploring window, open the <CD-ROM drive letter>:\Iconnect\Win_nt 95\setup.exe program.</td></tr></table></td></tr>
<tr><td>3</td><td>In the Enter Serial# and Key window, in the Serial# box, type the serial number.</td></tr>
<tr><td>4</td><td>In the Key box, type the serial number key.</td></tr>
<tr><td>5</td><td>Click Next.</td></tr>
<tr><td>6</td><td>In the Installation Options window, click Next.</td></tr>
<tr><td>7</td><td>In the Select Folder For Informix Applications window, click Next.</td></tr>
<tr><td>8</td><td>In the Ready To Install Files window, click Next.</td></tr>
</table>

Continued on next page

Installing Informix Client Connect, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>In the C:\WINNT\Profiles\All Users\Start Menu\Programs\Informix window, on the File menu, click Close.</td></tr>
<tr><td>10</td><td>In the Setup Complete window, click Finish.</td></tr>
<tr><td>11</td><td>Remove the CD-ROM from the drive.</td></tr>
<tr><td>12</td><td>In the Exploring window, open C:\Informix\bin.</td></tr>
<tr><td>13</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>The isqlt07c.dll file exists</td><td>Go to step 14.</td></tr>
<tr><td>The isqlt07c.dll file does not exist</td><td>a) On the File menu, point to New, and then click Folder.
b) In the new folder title box, type isqlt07c.dll.
c) Right-click the isqlt07c.79x file.
d) On the menu, click Copy.
e) Open the isqlt07c.dll folder.
f) On the File menu, click Paste.</td></tr>
</table>
</td></tr>
<tr><td>14</td><td>On the File menu, click Close.</td></tr>
</table>

Configuring Informix Client Connect

Introduction

In this topic, you will learn how to configure Informix Client Connect.

Prerequisite

You must be logged on to the client workstation as an administrator under the local machine.

Procedure

The following table describes how to configure Informix Client Connect:

Step	Action
1	Click Start, point to Programs, point to Informix, and then click Informix Setnet32.
2	Click the Server Information tab.
3	In the Informix Server box, type the first server name listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
4	In the Hostname box, type the host name of the first server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
5	In the Protocolname box, click the down arrow.
6	In the list, select the protocol name listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
7	In the Service name box, type the service file name listed under Service File Information in the *EAS IV Repository Security Packet*. **NOTE:** If there is any information in the Options box, select it and then press Delete.
8	Click Make Default Server.
9	Click Apply.
10	In the Informix Setnet32 window, click OK.
11	Click the Host Information tab.

Continued on next page

Configuring Informix Client Connect, Continued

Procedure (continued)

Step	Action
12	In the Current Host box, ensure that the host name you typed in step 4 appears.
13	In the User Name box, type the user name listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
14	In the Password Option box, select Password.
15	In the Password box, type the user password listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
16	Click OK.
17	In the Informix Setnet32 window, click OK.
18	Click Start, point to Programs, point to Informix, and then click Informix Setnet32.
19	Click the Server Information tab.
20	In the Informix Server box, type the name of the second server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
21	In the Hostname box, type the host name of the second server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
22	In the Protocolname box, click the down arrow.
23	In the list, select the protocol listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.

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Configuring Informix Client Connect, Continued

Procedure (continued)

Step	Action
24	In the Service name box, type the service file name listed under Service File Information in the *EAS IV Repository Security Packet*.
25	Click Make Default Server.
26	Click Apply.
27	In the Informix Setnet32 window, click OK.
28	Click the Host Information tab.
29	In the Current Host box, ensure that the host name you typed in step 4 appears.
30	In the User Name box, type the user name listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
31	In the Password Option box, select Password.
32	In the Password box, type the user password listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
33	Click OK.
34	In the Informix Setnet32 window, click OK.
35	Click Start, and then click Shut Down.
36	In the Shut Down Windows window, click Restart the computer?.
37	Click Yes.

Testing Database Connectivity

Introduction

In this topic, you will learn how to test database connectivity.

Prerequisite

You must be logged on to the client workstation as an administrator under the local machine name for the domain.

Procedure

The following table describes how to test database connectivity:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Start, and then click Run.</td></tr>
<tr><td>2</td><td>In the Run window, in the Open box, type ilogin.</td></tr>
<tr><td>3</td><td>Click OK.</td></tr>
<tr><td>4</td><td><table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Your operating system is Windows 95 or 98 and the message, Cannot find the file 'ilogin,' appears</td><td>Go to step 15.</td></tr>
<tr><td>Your operating system is Windows NT and the message, Cannot find the file 'ilogin,' appears</td><td>Go to step 5.</td></tr>
<tr><td>The Ilogin Demo for Informix-Connect for Win32 window appears</td><td>Go to step 32.</td></tr>
</table></td></tr>
<tr><td>5</td><td>Click OK.</td></tr>
<tr><td>6</td><td>Click Start, point to Informix, and then click Setnet32.</td></tr>
<tr><td>7</td><td>In the Setnet32 window, on the Environment tab, in the Informix Client/Server Environment list, select INFORMIXDIR=.</td></tr>
<tr><td>8</td><td>Under Edit Environment Variable, in the box, type C:\Informix.</td></tr>
</table>

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

Step	Action
9	Click Set.
10	In the Informix Client/Server Environment list, select INFORMIXSERVER=.
11	Under Edit Environment Variable, in the box, type the name of the first server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
12	Click Set.
13	Click OK.
14	Return to step 1.
15	Click OK.
16	Click Start, point to Programs, point to Accessories, and then click Notepad.
17	In the <Untitled> - Notepad window, on the File menu, click Open.
18	In the Look in box, select the C drive.
19	In the Files of type box, select All Files.
20	In the list, select autoexec.bat.
21	Click Open.

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

Step	Action
22	Position the cursor at the bottom of the file.
23	Type the following: **SET PATH=C:\INFORMIX\bin;%PATH%** **SET INFORMIXDIR=C:\INFORMIX**
24	On the File menu, click Save.
25	On the File menu, click Exit.
26	Click Start, and then click Shut Down.
27	In the Shut Down Windows window, click Restart the computer?.
28	Log on to the client workstation as an administrator under the local machine name.
29	Click Start, and then click Run.
30	In the Run window, in the Open box, type **ilogin**.
31	Click OK.
32	In the ILogin Demo for INFORMIX – Connect for Win32 window, on the File menu, click Run.
33	In the Login Parameters window, in the Server box, type the name of the first server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
34	In the Hostname box, type the host name of the first server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
35	In the Service Name box, type the service file name listed under Service File Information in the *EAS IV Repository Security Packet*.
36	In the Protocolname box, type the protocol listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.

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Testing Database Connectivity, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>37</td><td>In the Username box, type the user name t listed under Informix Client Connect Information in the EAS IV Repository Security Packet.</td></tr>
<tr><td>38</td><td>In the Password box, type the user password for listed under Informix Client Connect Information in the EAS IV Repository Security Packet.</td></tr>
<tr><td>39</td><td>In the Stores Database box, clear the information.</td></tr>
<tr><td>40</td><td>Click OK.</td></tr>
<tr><td>41</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>An error message appears</td><td>a) Click OK.
b) Return to step 32, and verify that you entered all the information exactly as it appears in these instructions.</td></tr>
<tr><td>The Customer Records Found window appears</td><td>Go to step 52.</td></tr>
<tr><td>An error message appears, and you already verified that all the information was entered exactly as it appears in these instructions</td><td>Go to step 42.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>42</td><td>Write the error number on a piece of paper.</td></tr>
<tr><td>43</td><td>In the ILogin Demo for INFORMIX – Connect for Win32 window, on the File menu, click Exit.</td></tr>
<tr><td>44</td><td>In the Message from ILogin Demo window, click Yes.</td></tr>
<tr><td>45</td><td>Click Start, point to Programs, point to Informix, and then click Find Error.</td></tr>
<tr><td>46</td><td>In the Informix Error Messages window, click Search.</td></tr>
<tr><td>47</td><td>In the Help Topics: Informix Error Messages window, select the number of the error that appeared.</td></tr>
<tr><td>48</td><td>Click Display.</td></tr>
<tr><td>49</td><td>Click Go To.</td></tr>
<tr><td>50</td><td>In the Informix Error Messages window, read the description of the error.</td></tr>
<tr><td>51</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>You know how to correct the error</td><td>a) Correct the error.
b) Return to step 29.</td></tr>
<tr><td>You do not know how to correct the error</td><td>a) Contact your administrator for help solving the error.
b) Return to step 29.</td></tr>
</table>
</td></tr>
<tr><td>52</td><td>In the Customer Records Found window, click OK.</td></tr>
<tr><td>53</td><td>In the ILogin Demo for INFORMIX – Connect for Win32 window, on the File menu, click Run.</td></tr>
</table>

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

Step	Action
54	In the Login Parameters window, in the Server box, type the name of the second server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
55	In the Hostname box, type the host name of the second server listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
56	In the Service Name box, type the service file name listed under Service File Information in the *EAS IV Repository Security Packet*.
57	In the Protocolname box, type the protocol listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
58	In the Username box, type the user name listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
59	In the Password box, type the user password listed under Informix Client Connect Information in the *EAS IV Repository Security Packet*.
60	In the Stores Database box, clear the information.
61	Click OK.

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>62</td><td>
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>An error message appears</td><td>a) Click OK.
b) Return to step 54, and verify that you entered all the information exactly as it appears in these instructions.</td></tr>
<tr><td>The Customer Records Found window appears</td><td>Go to step 73.</td></tr>
<tr><td>An error message appears, and you already verified that all the information was entered exactly as it appears in these instructions</td><td>Go to step 63.</td></tr>
</table>
</td></tr>
<tr><td>63</td><td>Write the error number on a piece of paper.</td></tr>
<tr><td>64</td><td>In the ILogin Demo for INFORMIX – Connect for Win32 window, on the File menu, click Exit.</td></tr>
<tr><td>65</td><td>In the Message from ILogin Demo window, click Yes.</td></tr>
</table>

Continued on next page

Testing Database Connectivity, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>66</td><td>Click Start, point to Programs, point to Informix, and then click Find Error.</td></tr>
<tr><td>67</td><td>In the Informix Error Messages window, click Search.</td></tr>
<tr><td>68</td><td>In the Help Topics: Informix Error Messages window, select the number of the error that appeared.</td></tr>
<tr><td>69</td><td>Click Display.</td></tr>
<tr><td>70</td><td>Click Go To.</td></tr>
<tr><td>71</td><td>In the Informix Error Messages window, read the description of the error.</td></tr>
<tr><td>72</td><td><table><tr><th>If</th><th>Then</th></tr><tr><td>You know how to correct the error</td><td>a) Correct the error.
b) Return to step 53.</td></tr><tr><td>You do not know how to correct the error</td><td>a) Contact your administrator for help solving the error.
b) Return to step 53.</td></tr></table></td></tr>
<tr><td>73</td><td>In the Customer Records Found window, click OK.</td></tr>
<tr><td>74</td><td>In the ILogin Demo for INFORMIX – Connect for Win32 window, on the File menu, click Exit.</td></tr>
<tr><td>75</td><td>In the Message form ILogin Demo window, click Yes.</td></tr>
</table>

LESSON B
INSTALLING AND CONFIGURING BUSINESS OBJECTS 5.1.5

Overview

Introduction

In this lesson, you will learn how to install and configure Business Objects 5.1.5 on a client workstation. Business Objects 5.1.5 is a software product that queries EAS IV Repository data, formats the data in reports, and supplies multiple methods to analyze the data.

NOTE: Any references to installation drive letters are the suggested drives to use; however, you may install on the drive of your choice.

Definition

Business Objects 5.1.5 is a COTS software product that provides the EAS IV Repository end-user with a Microsoft Windows GUI for data access and decision support. The application stores EAS IV Repository data and refers to them as objects. Objects are grouped logically into classes, and classes are grouped into universes. The universe and class names enable Business Objects 5.1.5 to locate queried data to format the data in a report.

Lesson Objective

Upon completion of this lesson, you will be able to do the following:

- Install Business Objects 5.1.5 on a client workstation
- Configure Business Objects 5.1.5 on a client workstation

Order of Topics

This lesson includes the following topics:

Installing Business Objects 5.1.5

Introduction

In this topic, you will learn how to install Business Objects 5.1.5.

NOTE: You only need to install this version of Business Objects if you currently do not have this version on your workstation.

Prerequisite

You must be logged on to the client workstation as an administrator under the local machine name for the domain.

Procedure

The following table describes how to install Business Objects 5.1.5:

Configuring Windows 2000 for BusinessObjects 5.1.5 users to access

NOTE: THIS UTILITY SHOULD ONLY BE INSTALLED ON WINDOWS 2000 CLIENT WORKSTATIONS

Perform the following steps to execute the AllowBo51-26-W2000 Utility:

Step	Action
1	Log on as the administrator on the local client machine
2	Click Start, then Settings, then Control Panel
3	Double-click on the Users and Passwords icon
4	On the Users and Passwords window, for each user listed as a Power User, you must remove them from the Power Users Group. To remove Users from the Power User group, select the User and click the Remove button. NOTE: If there are not any Users in the Power User Group, proceed with the next step.
5	On the Users and Passwords window, click the OK button
6	Press the Control, ALT and Delete keys simultaneously
7	Click on the Task Manager button

Step	Action
8	On the Task Manager window click on the Processes tab
9	Click on Start, then Run, then Browse
10	Locate and select the file "Allow B051-26-W2000.exe" on the EAS IV 2.4.0.0 Compact disk.
11	On the Browse window, click the Open button
12	On the Run window, click the OK button
13	In the Task Manager window, locate the file AllowB051-26W2000.exe in the Image Name column.
14	When the AllowBo51-26-W2000.exe file disappears, close the Task Manager window.
15	The Utility is finished

Installing BusinessObjects 5.1.5 Software

Perform the following steps to install the BusinessObjects 5.1.5 software:

Step	Action
1	Insert BusinessObject CD Volume 1 NOTE: If the setup program does not start automatically, click on Start, Run, then select Browse to the CD ROM drive. Then launch the setup.exe located in the setup folder.
2	On the BusinessObjects Setup-Welcome window, click the Begin button
3	On the BusinessObjects Setup-Overview window, click the Next button
4	On the BusinessObjects Setup-Step #1 window, type in your name and the name of the organization
5	Click the Next button
6	On the BusinessObjects Setup- Step #2 window type in your Product Key and Data Access Key
7	Click the Next button

Step	Action
8	On the BusinessObjects Setup – Step #3 window, click the 'I AGREE' button.
9	On the BusinessObjects Setup-Step #4 window, select the Stand-Alone Setup option
10	Click the Next button
11	On the BusinessObjects Setup-Step #5 window, select the Custom option
12	Click the Next button
13	On the BusinessObjects Setup-Step #6 window, verify that the option for keeping your existing 4.x installation is selected
14	Click the Next button
15	On the BusinessObjects Setup-Step #7 window, verify that the Main BusinessObjects folder is **C:\Program Files\Business Objects**
16	On the Business Objects Setup-Step #7 window, verify that the BusinessObjects Shared folder is **C:\Program Files\Business Objects\BusinessObjects 5.0\ShData**
17	Click the Next button
18	If a message pops up asking "C:\program files\Business Objects\BusinessObjects 5.0 does not exist. Do you want to create it?" , Click the YES button
19	On the BusinessObjects Setup- Step #8 window, make sure that the only options checked are BusinessObjects and Multimedia
20	Click the Install button
21	If a window appears prompting you to close all other windows, do so and click the OK button

Step	Action
22	On the Insert Disk window, click the OK button after you insert the Business Objects Volume 2 CD **NOTE: System Administrator will be required to wait several minutes prior to continuing the software installation after loading the Business Objects Volume 2 CD. This will give Windows time to recognize the CD properly.**
23	On the Business Objects Setup window, click the Yes button if you wish to view the Readme.txt file, otherwise click the No button
24	If you view the ReadMe.txt file, close it when you are finished viewing the file
25	On the BusinessObjects Setup window, click the Yes button to check the middleware
26	Verify the following information in one of the sections: **Starting to check if the middleware components are correctly installed (Informix Connect v7, INFORMIX).** **INFORMIXDIR... ok.** **INFORMIXSERVER... ok.** **HKEY_LOCAL_MACHINE\SOFTWARE\Informix\SqlHosts\eas4_svr... ok.** **Path... ok.** **isqlt07c.dll... ok.** **The middleware checking has not detected any errors (Informix Connect v7, INFORMIX).** NOTE: If the text above does not appear on your workstation, complete Section D.11.3 "Configuring the Informix Client Connect Software (SetNet32)".
27	On the Business Objects Setup window, click the OK button
28	If prompted to restart/reboot your client workstation, do so

Setting Up a Business Objects 5.1.5 Shortcut

Introduction

In this topic, you will learn how to set up the Business Objects 5.1.5 shortcut.

Prerequisite

You must be logged on to the client workstation as an administrator under the local machine name for the domain.

Procedure

The following table describes how to set up the Business Objects 5.1.5 shortcut:

Step	Action
1	Right-click the Start menu, and then click Explore.
2	Open the C:\Program Files\Business Objects\Business Objects 5.1.5 folder.
3	Right-click the Busobj.exe file, and then click Create Shortcut.
4	Drag the new shortcut to the desktop.

Setting Up the Business Objects Report Module

Introduction

In this topic, you will learn how to set up the Business Objects report module.

Prerequisite

You must ensure that the Business Objects administrator for your Service establishes your EAS IV Repository Business Objects user account and User ID in the Business Objects Supervisor module before you can set up the Business Objects report module.

You must be logged on to the client workstation as the EAS IV Repository user under the domain.

Procedure

The following table describes how to set up the Business Objects report module:

Step	Action
1	On the desktop, double-click the Business Objects 5.1.5 icon.
2	In the User Identification window, in the User Name box, type the user's Business Objects login ID.
3	In the Password box, type the user's Business Objects password.
4	Click OK.
5	In the New Report Wizard window, clear Run this Wizard at Startup.
6	Click Cancel.
7	In the Business Objects window, on the Tools menu, click Universes.
8	In the Universes window, in the list, select the EAS IV Repository universe.
9	Click Import.
10	In the Import Universe window, click OK.