# Getting Started with BusinessObjects

BusinessObjects 6.5

Windows

Part Number

302-10-650-01

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# Maximizing Your Information Resources

preface

# Overview

## Information, services, and solutions

The Business Objects business intelligence solution is supported by thousands of pages of documentation, available from the products, on the Internet, on CD, and by extensive online help systems and multimedia.

Packed with in-depth technical information, business examples, and advice on troubleshooting and best practices, this comprehensive documentation set provides concrete solutions to your business problems.

Business Objects also offers a complete range of support and services to help maximize the return on your business intelligence investment. See in the following sections how Business Objects can help you plan for and successfully meet your specific technical support, education, and consulting requirements.

# Information resources

Whatever your Business Objects profile, we can help you quickly access the documentation and other information you need.

## Where do I start?

Below are a few suggested starting points; there is a summary of useful web addresses on page 12.

- **Documentation Roadmap**

- **Documentation Roadmap**

The Documentation Roadmap references all Business Objects guides and multimedia, and lets you see at a glance what information is available, from where, and in what format.

View or download the **Business Objects Documentation Roadmap** at www.businessobjects.com/services/documentation.htm

- **Documentation from the products**

You can access electronic documentation at any time from the product you are using. Online help, multimedia, and guides in Adobe PDF format are available from the product Help menus.

- **Documentation on the web**

The full electronic documentation set is available to customers with a valid maintenance agreement on the **Online Customer Support** (OCS) website at www.businessobjects.com/services/support.htm

- **Buy printed documentation**

You can order printed documentation through your local sales office, or from the online **Business Objects Documentation Supply Store** at www.businessobjects.com/services/documentation.htm

- **Search the Documentation CD**

Search across the entire documentation set on the Business Objects Documentation CD shipped with our products. This CD brings together the full set of documentation, plus tips, tricks, multimedia tutorials, and demo materials.

Order the Documentation CD online, from the Business Objects Documentation Supply Store, or from your local sales office.

### Multimedia

Are you new to Business Objects? Are you upgrading from a previous release or expanding, for example, from our desktop to our web solution? Try one of our multimedia quick tours or Getting Started tutorials. All are available via the Online Customer Support (OCS) website or on the Documentation CD.

## How can I get the most recent documentation?

You can get our most up-to-date documentation via the web. Regularly check the sites listed below for the latest documentation, samples, and tips.

### Tips & Tricks

Open to everyone, this is a regularly updated source of creative solutions to any number of business questions. You can even contribute by sending us your own tips.

www.businessobjects.com/forms/tipsandtricks_login.asp

### Product documentation

We regularly update and expand our documentation and multimedia offerings. With a valid maintenance agreement, you can get the latest documentation – in seven languages – on the Online Customer Support (OCS) website.

### Developer Suite Online

Developer Suite Online provides documentation, samples, and tips to those customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website.

## Send us your feedback

Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful? Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation: documentation@businessobjects.com

**NOTE**

If your issue concerns a Business Objects product and not the documentation, please contact our Customer Support experts. For information about Customer Support visit: www.businessobjects.com/services/support.htm

# Services

A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business.

## How we can support you?

Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate three global customer support centers:

- Americas: San Jose, California and Atlanta, Georgia
- Europe: Maidenhead, United Kingdom
- Asia: Tokyo, Japan and Sydney, Australia

### Online Customer Support

Our Customer Support website is open to all direct customers with a current maintenance agreement, and provides the most up-to-date Business Objects product and technical information. You can log, update, and track cases from this site using the Business Objects Knowledge Base.

## Having an issue with the product?

Have you exhausted the troubleshooting resources at your disposal and still not found a solution to a specific issue?

For support in deploying Business Objects products, contact Worldwide Customer Support at: www.businessobjects.com/services/support.htm

## Looking for the best deployment solution for your company?

Business Objects consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in relational and multidimensional databases, in connectivities, database design tools, customized embedding technology, and more.

For more information, contact your local sales office, or contact us at: www. businessobjects.com/services/consulting.htm

## Looking for training options?

From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style. Find more information on the Business Objects Education website: www.businessobjects.com/services/education.htm

# Useful addresses at a glance

| Address | Content |
|---|---|
| **Business Objects Documentation**<br><br>www.businessobjects.com/services/documentation.htm | Overview of Business Objects documentation. Links to Online Customer Support, Documentation Supply Store, Documentation Roadmap, Tips & Tricks, Documentation mailbox. |
| **Business Objects Documentation mailbox**<br><br>documentation@businessobjects.com | Feedback or questions about documentation. |
| **Product documentation**<br><br>www.businessobjects.com/services/support.htm | The latest Business Objects product documentation, to download or view online. |
| **Business Objects product information**<br><br>www.businessobjects.com | Information about the full range of Business Objects products. |
| **Developer Suite Online**<br><br>www.techsupport.businessobjects.com | Available to customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website. Provides all the documentation, latest samples, kits and tips. |
| **Knowledge Base (KB)**<br><br>www.techsupport.businessobjects.com | Technical articles, documents, case resolutions.<br>Also, use the **Knowledge Exchange** to learn what challenges other users – both customers and employees – face and what strategies they find to address complex issues. From the Knowledge Base, click the Knowledge Exchange link. |
| **Tips & Tricks**<br><br>www.businessobjects.com/forms/tipsandtricks_login.asp | Practical business-focused examples. |

| Address | Content |
| --- | --- |
| **Online Customer Support**<br><br>www.techsupport.businessobjects.com<br><br>www.businessobjects.com/services | <br><br>Starting point for answering questions, resolving issues.<br><br>Information about registering with **Worldwide Customer Support**. |
| **Business Objects Education Services**<br><br>www.businessobjects.com/services/education.htm | The range of Business Objects training options and modules. |
| **Business Objects Consulting Services**<br><br>www.businessobjects.com/services/consulting.htm | Information on how Business Objects can help maximize your business intelligence investment. |

# About this guide

This guide provides a series of step-by-step tutorials to introduce you to standard BusinessObjects concepts.

## Audience

This guide is intended for novice users of BusinessObjects who are interested in learning how to use BusinessObjects by creating basic queries and reports on the demonstration universe.

## Conventions used in this guide

The conventions used in this guide are described in the table below.

| Convention | Indicates |
|---|---|
| `This font` | Code, SQL syntax, computer programs. For example: `@Select(Country\Country Id)`. This font is also used for all paths, directories, scripts, commands and files for UNIX. |
| `Some code` ↵<br>`more code` | Placed at the end of a line of code, the symbol (↵) indicates that the next line should be entered continuously with no carriage return. |
| $DIRECTORYPATHNAME | The path to a directory in the Business Objects installation/configuration directory structure. For example:<br>• $INSTALLDIR refers to the Business Objects installation directory.<br>• $LOCDATADIR refers to a subdirectory of the BusinessObjects installation directory called locData. |

# Introduction

chapter 1

# Overview

This introductory chapter for Getting Started with BusinessObjects covers the following:

- What is the goal of this tutorial?
- How does the tutorial work?
- The eFashion story line
- What do I need to do the tutorial?
- Quick lesson overview
- Your comments are welcome

# What is the goal of this tutorial?

This tutorial aims to introduce first-time users to BusinessObjects. Its goal is to teach you how to build BusinessObjects reports using corporate and personal data and then teach you how to analyze the data in the reports to help you make the decisions that affect your business.

## Who is the target audience?

The main focus of this tutorial is to help users who are new to BusinessObjects or users who are updating from a previous version of BusinessObjects. Business Objects assumes that you are familiar with Microsoft Windows 2000 and NT interface standards and conventions but that you are using this version of BusinessObjects for the first time.

## What does the tutorial cover?

This tutorial covers aspects of query, reporting, analysis and report distribution in BusinessObjects.

This tutorial covers as many aspects of BusinessObjects as possible to give first-time users a good grounding in the basics and to introduce you to the rich possibilities of BusinessObjects. A tutorial cannot, of course, cover everything. For further information on any of the tasks shown here (and more), see the *BusinessObjects User's Guides*.

# How does the tutorial work?

The tutorial is made up of eight lessons. The objective of each lesson is to build a BusinessObjects report to answer a business question. Each lesson shows you how to carry out the tasks needed to build the report by taking you through step-by-step exercises.

You can do the lessons in or out of sequence. However, the lessons have been designed to gradually increase the complexity of the tasks you have to carry out, building on what you have learned in the previous lessons. Each lesson will take you between 10 and 15 minutes to do.

The lessons in this tutorial are based on the eFashion demo materials that are delivered on the BusinessObjects installation CD and on the BusinessObjects Documentation CD.

### New task

The first time you carry out a task in this tutorial, you get a full explanation of how to do it with a detailed step-by-step procedure.

### Recap task

As you progress through the lessons, you may have to carry out the same task again. If a task has already been explained, we will not always give the detailed procedure again. If you need a reminder of how to do it, look at the index to find out where the procedure appears in the guide.

### Multimedia Quick Tour

For some of the tasks described in this tutorial, there is also an animated demonstration in the multimedia Quick Tour. You can open the Quick Tour directly from the BusinessObjects Help menu once you have started BusinessObjects.


*An actual screen from Quick Tour*

### Finished reports

At the beginning of each lesson, we show the report that the lesson will teach you to build and then take you through the steps to do it.

If you want to look at a finished report, all the reports described in this tutorial, *Efashion.rep*, *Revenue.rep, Tutorial.rep* are in the userDocs folder in the My BusinessObjects Documents folder. They are copied to this location the first time you run BusinessObjects from the documents folder, under the demo folder in the BusinessObjects Enterprise 6 program folder.

# The eFashion story line

It is the year 2004 and you work for eFashion, a successful retail store selling fashion merchandise in 11 US cities. The company currently sells 211 products across 12 different product lines.

You are an analyst working at eFashion Head Quarters in New York and your job is to produce and distribute BusinessObjects reports to all eFashion stores.

You are currently putting together a series of reports on the company's performance over this last year, 2003. Some of these reports will be sent to selected individuals within the company and others will be published and available to all company employees.

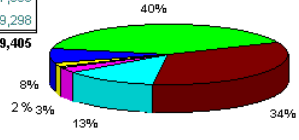
## Product Line Revenue 2003

*eFashion retail*

Refresh to select another line

| Product Line | Category | Revenue |
|---|---|---|
| Accessories | Belts,bags,wallets | $759,861 |
| | Hair accessories | $147,043 |
| | Hats,gloves,scarves | $37,588 |
| | Jewelry | $58,560 |
| | Lounge wear | $247,053 |
| | Samples | $649,298 |
| **Accessories** | | **$1,899,405** |

Line revenue

# What do I need to do the tutorial?

To do the tutorial, you need to have BusinessObjects installed and running on your computer and make sure that the following files are installed in the correct locations. These files are installed as part of the eFashion demo kit. If they have not been installed, contact the person in charge of setting up BusinessObjects in your company.

### Installing BusinessObjects

There are two ways you can install BusinessObjects:

- Corporate installation performed by your Business Objects administrator. You have access to the demonstration universes via the connection setup by the administrator at the corporate level.
- Individual *stand-alone* installation performed by you. In addition to the BusinessObjects product, you must install the Access Pack middleware to allow the automatic connection to the demonstration universe efashion.unv.

### Installing BusinessObjects from InfoView

If you installed BusinessObjects from InfoView via an Internet browser, these demo materials and middleware are not automatically installed. You will need to copy the reports, templates, image and Excel files manually to the correct folders and make sure your Business Objects administrator has given you access to the eFashion database and universe.

### eFashion demo materials

To complete this tutorial, you need the following demo files:

| File name | File Type | Default Location in Program Files |
|---|---|---|
| efashion.unv | BusinessObjects universe. | Business Objects\ BusinessObjects Enterprise 6\ demo\universes |
| efashion.mdb | Microsoft Access database. | Business Objects\ BusinessObjects Enterprise 6\ demo\databases |
| efashion.xls | Microsoft Excel spreadsheet | Business Objects\ BusinessObjects Enterprise 6\ demo\documents\ |

| File name | File Type | Default Location in Program Files |
|---|---|---|
| efashion.bmp | Bitmap image of the eFashion corporate logo | Business Objects\ BusinessObjects Enterprise 6\ demo\documents\ |
| efashion_md.ret<br>efashion.ret | \BusinessObjects templates. | Business Objects\ BusinessObjects Enterprise 6\ demo\templates\ |
| efashion.rep<br>tutorial.rep<br>revenue.rep | BusinessObjects documents containing the finished tutorial reports to show you what they should look like. | Business Objects\ BusinessObjects Enterprise 6\ demo\documents |

**NOTE**

The first time you run BusinessObjects the demonstration documents with the file extensions .rep, .xls, and .bmp, are copied from the folders indicated above, to the folder `My Document\ My BusinessObjects Documents\ userDocs`. This makes them easily accessible in the default location when you want to open them from BusinessObjects.

# Quick lesson overview

The table below gives a brief overview of the eight lessons in this tutorial:

| Lesson | Business question | Learn how to..... | Report Title |
|---|---|---|---|
| 1 | How much revenue did eFashion outlets make this year? | Create a simple query to build a report and format and organize the report data. | Efashion.rep, Revenue Year 2003 |
| 2 | How is revenue affected by regional and seasonal differences? | Manipulate variables using drag and drop; organize a report in sections and rank data. | Efashion.rep, Revenue by Region |
| 3 | Which cities are making the best margin? | Use the Formula Editor to make calculations and create variables; use alerters to highlight interesting data. | Efashion.rep, Margin Analysis |
| 4 | How has sales revenue progressed from quarter to quarter? | Display and format financial data in a table; calculate quarterly variance and publish the report. | Efashion.rep, Quarterly Variance |
| 5 | How did product lines perform over the last four quarters? | Organize and view reports that contain a lot of data using breaks to display totals and subtotals; learn about calculation contexts; learn how to use a template to quickly format reports to corporate standards. | Efashion.rep, Product Analysis |

| Lesson | Business question | Learn how to..... | Report Title |
|---|---|---|---|
| 6 | How do the budget sales figures compare with the actual sales figures? | Learn how to bring data from a personal data file into BusinessObjects and combine it with data from a BusinessObjects Universe query; create and format a chart to compare data. | Efashion.rep, Actual v Budget |
| 7 | What factors impact sales revenue performance? | Use BusinessObjects drill mode to analyze your business data. | Revenue.rep, sales analysis |
| 8 | How much revenue did this product line make this week? | Set up a report to prompt users to choose what data they want to get; refresh a report to get the up-to-date data. | Tutorial.rep, weekly revenue |

# Your comments are welcome

We encourage you to send us any suggestions, ideas or comments that you may have regarding this guide. Your opinions are the most important input we receive as we revise BusinessObjects documentation.

You can contact us by email at documentation@businessobjects.com.

To find out information about BusinessObjects products and services, visit our website at www.businessobjects.com.

This site also provides information on contacting our technical support services.

# How Much Revenue Have Efashion Outlets Made This Year?

# Overview

Here is a brief summary of this lesson's content and planning details.

**Business question**

How much revenue have eFashion outlets made this year?

**Learning objective**

Learn how to create a simple query to build a report and format and organize the data in the report.

**Time**

10 minutes

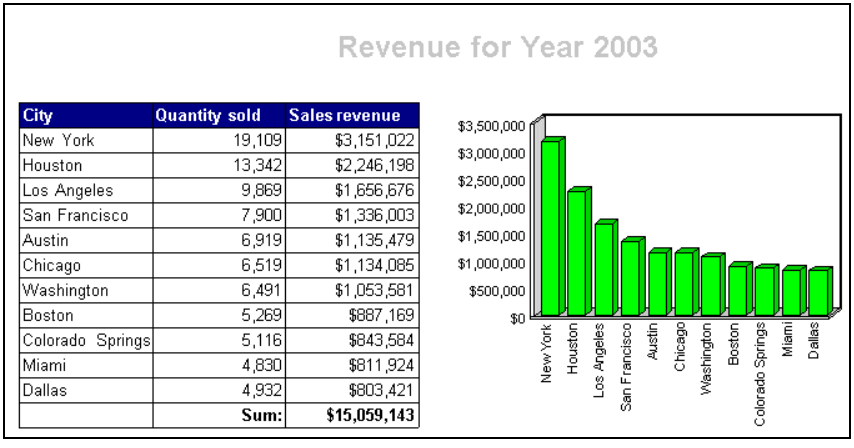
**Finished report**

Efashion.rep, Revenue Year 2003

# Objective

You want to get a high-level view of the revenue that eFashion outlets have generated this year. To do this, you need to get the sales revenue for all the cities with eFashion outlets for the current year, 2003, from your corporate database. To choose your data from your database, you're going to use a BusinessObjects universe that has been set up for the eFashion company and which puts the database contents into the terms you use every day to describe your business.

This lesson takes you through all the steps needed to build the following report to display Revenue for Year 2003:




| City | Quantity sold | Sales revenue |
|---|---|---|
| New York | 19,109 | $3,151,022 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| San Francisco | 7,900 | $1,336,003 |
| Austin | 6,919 | $1,135,479 |
| Chicago | 6,519 | $1,134,085 |
| Washington | 6,491 | $1,053,581 |
| Boston | 5,269 | $887,169 |
| Colorado Springs | 5,116 | $843,584 |
| Miami | 4,830 | $811,924 |
| Dallas | 4,932 | $803,421 |
| | **Sum:** | **$15,059,143** |

## Before you begin

Make sure that you have everything you need installed on your computer. For information on what you need, see What do I need to do the tutorial? on page 21.

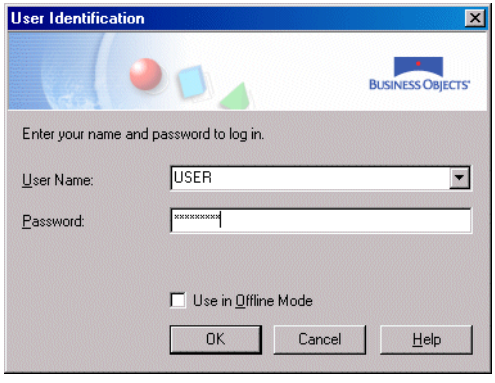
# Start BusinessObjects

First, you have to start BusinessObjects. To do this:

1. Click the **BusinessObjects** program icon in the **Business Objects** group in the **Programs** menu.

   What happens next depends on how BusinessObjects has been set up in your company. If BusinessObjects opens directly, go to the next section, Get the data you need.

   If the The User Identification dialog box appears:




2. Enter your **User Name** and **Password**, if applicable, choose your security domain, and click **OK**.

   The User Identification dialog box closes and the BusinessObjects window opens.

**NOTE**

The user name, password and security domain are assigned by your Business Objects supervisor or system administrator.

# Get the data you need

To create a new report, BusinessObjects has the New Report Wizard. This wizard guides you through how to get the data you need to build your report.

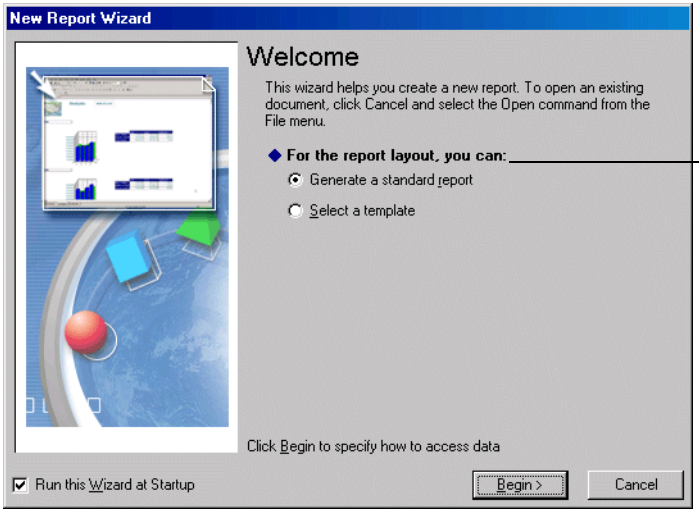
When you open BusinessObjects, the New Report Wizard displays automatically. If it is not opened automatically:

New Report Wizard

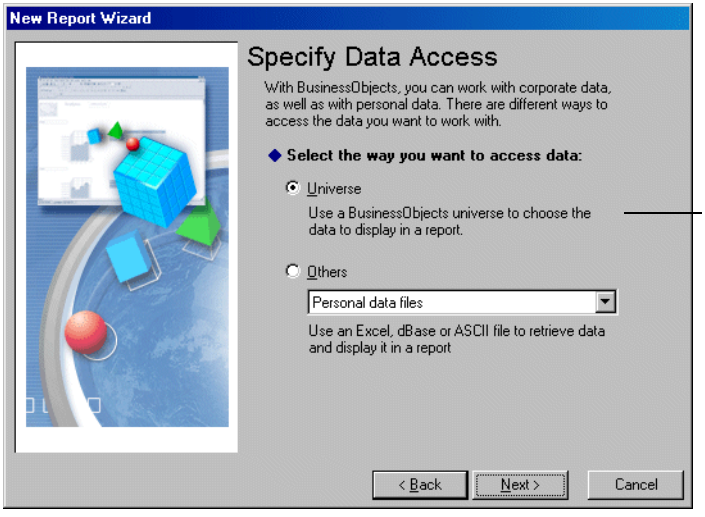
- Click **New Report** on the **Standard** toolbar.

  The New Report Wizard displays.

1. Choose *Generate a Standard Report* and click **Begin**.

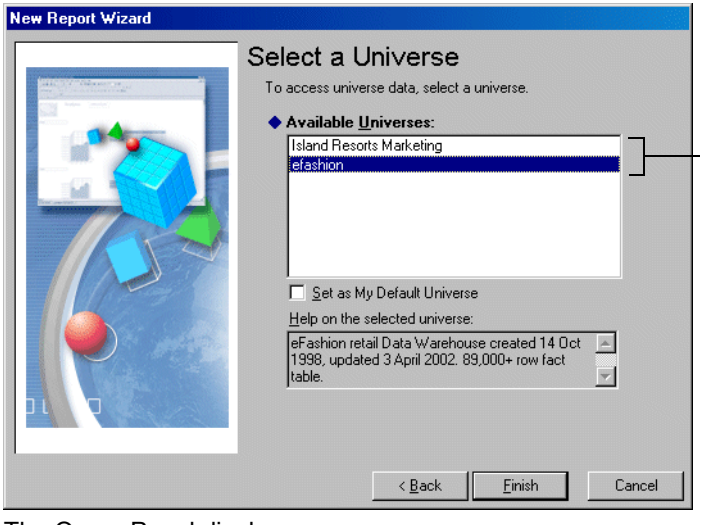


2. Click **Universe** and click **Next**.




This is how you are going to choose the data to display in your report.

3. Click **eFashion** from the box under Available Universes and click **Finish**.




These are the universes that you can use.

The Query Panel displays.

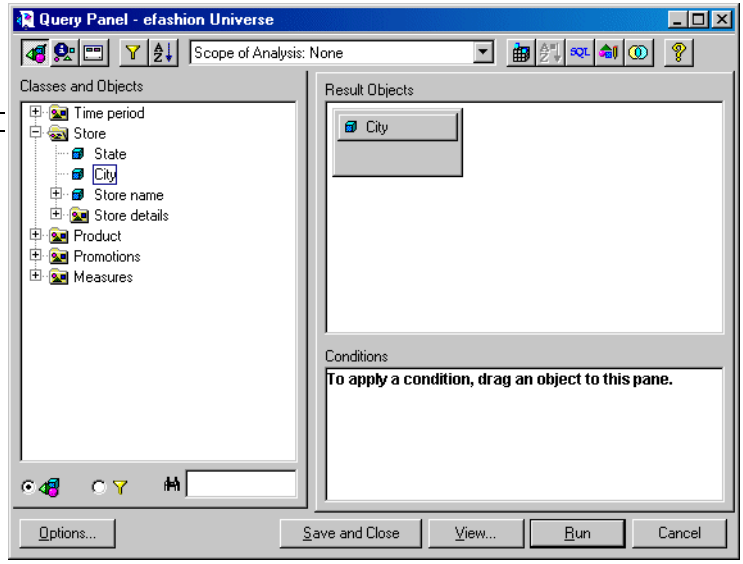
## Add data to the Query Panel

The Query Panel is where you choose which data from your database you want to have in your report.

1. Open the **Store Folder** and double-click on **City**.
   City appears the Result Objects section.

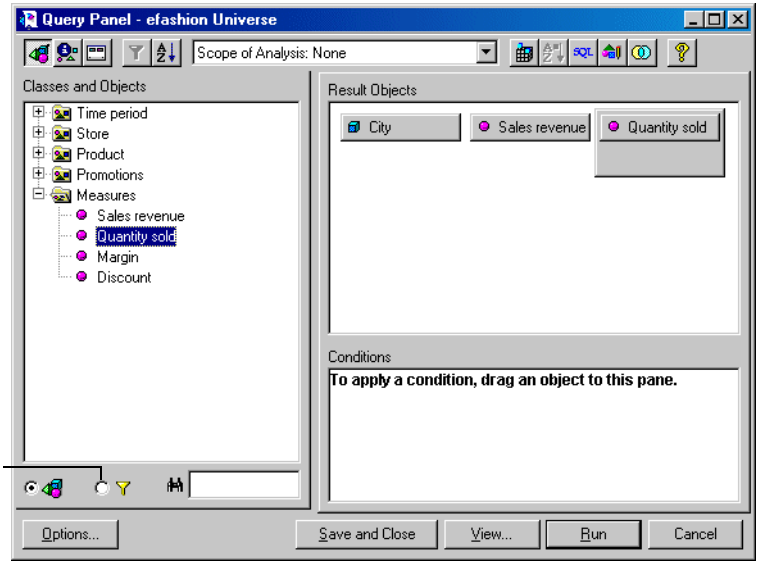
Click on the plus sign to open a folder

Click on the minus sign to close a folder




2. Open the Measures folder and double-click **Sales revenue** then **Quantity sold**.

Sales revenue and Quantity sold appear in the Result Objects section.



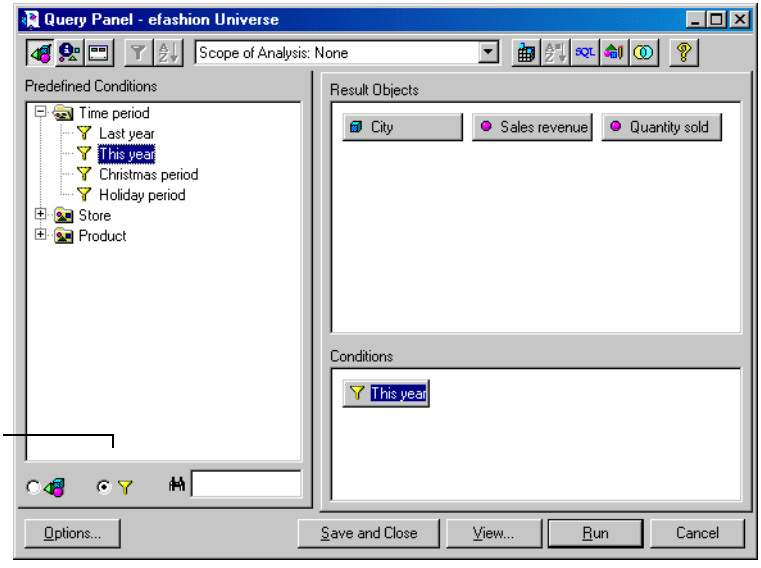

Click to show Pre-defined conditions

You now have the data to build a report where you are going to display sales revenue and quantity sold per city. Your database has data for the last three years but you are only interested in the latest year, 2003. To specify that you only want data for this year:

Pre-defined Conditions option

3. Click the pre-defined condition option.
4. Open the **Time Period** folder and drag **This Year** into the Conditions section.

You have specified which data you want from your database and are ready to run the query.



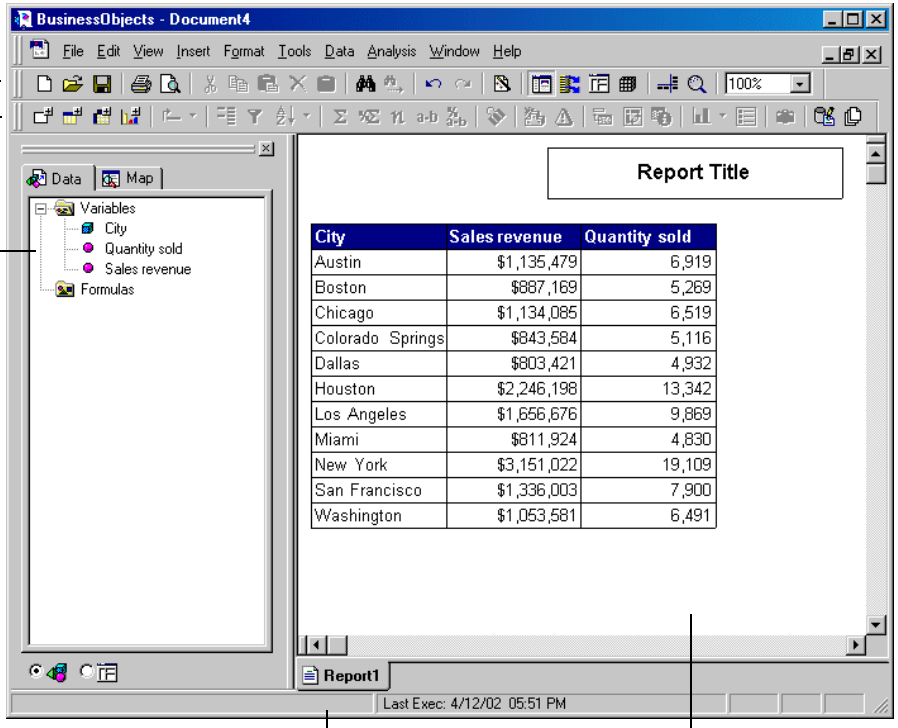

5. Click **Run**.

   BusinessObjects connects to the database and retrieves the data you specified. The data displays in a new standard report.

# Display Data In A Standard Report

You have built a standard report that shows sales revenue and quantity sold for the eleven cities where the eFashion retail chain does business. A standard report displays your data in a table with a report title. As you will see later, you can present this data in different ways.

Your report is contained inside a BusinessObjects document. A BusinessObjects document contains data and at least one report. The data contained in the document displays in the Report Manager window.




**TIP**

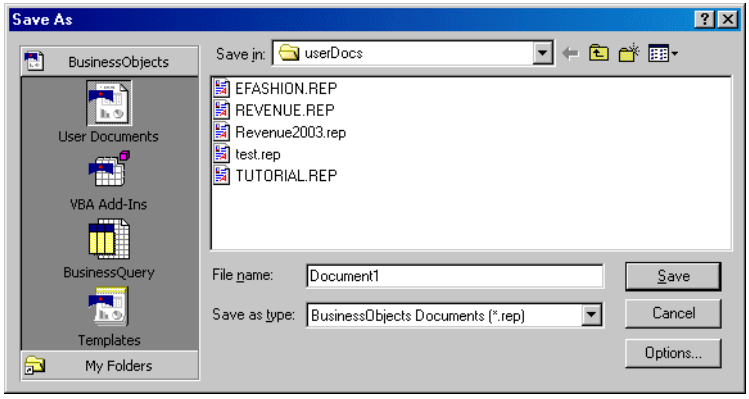
*If the Report Manager is not open, click Report Manager from the View menu.*

## Save your BusinessObjects document

Before you go any further, save your document containing the report:

1. From the **File** menu, choose **Save**.

   The Save As dialog box opens.




2. Choose where you want to save the document and enter a name.

   By default, BusinessObjects saves BusinessObjects documents in the *userDocs* folder in the *My BusinessObjects Documents* folder.

   The document saves with the file extension *.rep*.

# Organize the data

Now you have the data, let's organize it a little differently.

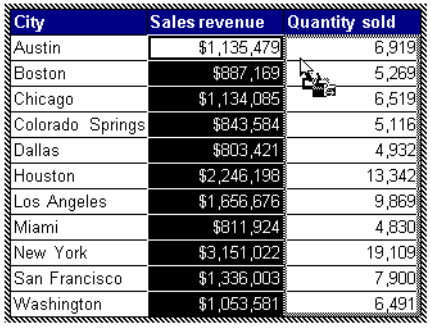
## Swap Quantity sold and Sales revenue columns

You can swap columns of data in a table by simply dragging and dropping:

1. Click once in the **Sales revenue** column to highlight the Sales revenue column.

Swap cursor

| City | Sales revenue | Quantity sold |
|---|---|---|
| Austin | $1,135,479 | 6,919 |
| Boston | $887,169 | 5,269 |
| Chicago | $1,134,085 | 6,519 |
| Colorado Springs | $843,584 | 5,116 |
| Dallas | $803,421 | 4,932 |
| Houston | $2,246,198 | 13,342 |
| Los Angeles | $1,656,676 | 9,869 |
| Miami | $811,924 | 4,830 |
| New York | $3,151,022 | 19,109 |
| San Francisco | $1,336,003 | 7,900 |
| Washington | $1,053,581 | 6,491 |



| City | Sales revenue | Quantity sold |
|---|---|---|
| Austin | $1,135,479 | 6,919 |
| Boston | $887,169 | 5,269 |
| Chicago | $1,134,085 | 6,519 |
| Colorado Springs | $843,584 | 5,116 |
| Dallas | $803,421 | 4,932 |
| Houston | $2,246,198 | 13,342 |
| Los Angeles | $1,656,676 | 9,869 |
| Miami | $811,924 | 4,830 |
| New York | $3,151,022 | 19,109 |
| San Francisco | $1,336,003 | 7,900 |
| Washington | $1,053,581 | 6,491 |

2. Click again in the **Sales revenue** column and, holding down your left mouse button, drag the cursor over the **Quantity sold** column.
3. When the cursor changes to the swap cursor and the status bar at the bottom of the BusinessObjects window displays the message *Drop to swap contents*, release the mouse.


Status bar

The two columns have swapped positions.

| City | Quantity sold | Sales revenue |
|---|---|---|
| Austin | 6,919 | $1,135,479 |
| Boston | 5,269 | $887,169 |
| Chicago | 6,519 | $1,134,085 |
| Colorado Springs | 5,116 | $843,584 |
| Dallas | 4,932 | $803,421 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| Miami | 4,830 | $811,924 |
| New York | 19,109 | $3,151,022 |
| San Francisco | 7,900 | $1,336,003 |
| Washington | 6,491 | $1,053,581 |

## Add total sales revenue

Now let's add up the columns and display the total sales revenue for all cities. To do this:

Sum

1. Click in **Sales revenue** column.
2. Click **Sum** on the **Report** toolbar.

   The total Sales revenue displays in a new row at the bottom of the table. This is called a footer row.

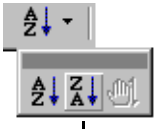
Sum dimmed

| City | Quantity sold | Sales revenue |
|---|---|---|
| Austin | 6,919 | $1,135,479 |
| Boston | 5,269 | $887,169 |
| Chicago | 6,519 | $1,134,085 |
| Colorado Springs | 5,116 | $843,584 |
| Dallas | 4,932 | $803,421 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| Miami | 4,830 | $811,924 |
| New York | 19,109 | $3,151,022 |
| San Francisco | 7,900 | $1,336,003 |
| Washington | 6,491 | $1,053,581 |
| | **Sum:** | **$15,059,143** |

The footer row displays the total sales revenue for all cites

## Sort sales revenue

You want to organize the cities in the table according to sales revenue so that you can see at a glance who is making the most revenue. To sort the data:



Descending Sort

1. Click in the **Sales revenue** column.
2. Click **Sorts** on the **Report** toolbar.
3. Click **Descending Sort**.

   The column sorts so that the highest revenue displays at the top of the list and the lowest at the bottom.

   You see that the city of New York has the highest sales revenue for this year.

**TIP**

Undo

*If you make a mistake or are not happy with the result of an action you've just carried out, click Undo on the Standard toolbar or type Ctr + Z to undo the action. You can undo up to ten consecutive actions.*

# Format the report title

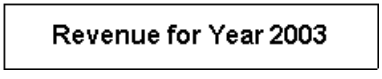
Now, let's give your report a title. Whenever you add data or text to a report it has to be contained. BusinessObjects has three basic containers: tables, charts and free-standing cells. Text, such as report title, is contained in a free-standing cell. A free-standing cell is a cell that is not attached to any other report element.

### ▶ Give the report a title

A Standard report contains a placeholder for a title. To edit the text in the title placeholder:

1. Double-click inside the cell that contains the text *Report Title*.
   Report Title is highlighted.

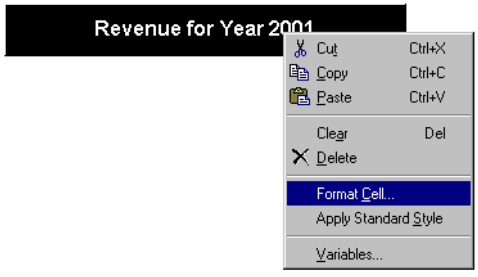

2. Enter *Revenue for year 2003* and press the **Enter**.
   The new text displays in the cell.



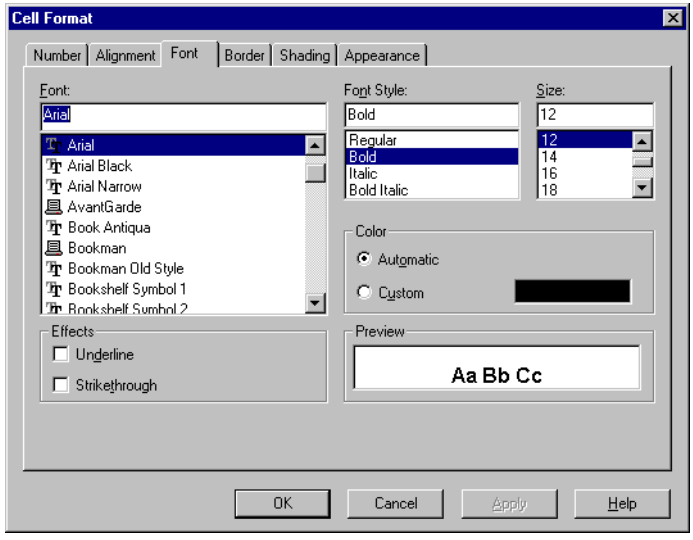
### Format the title

Let's now format this title a little differently. To do this:

1. Right-click on the cell and choose **Format Cell** from the menu. The Format Cell dialog box opens.

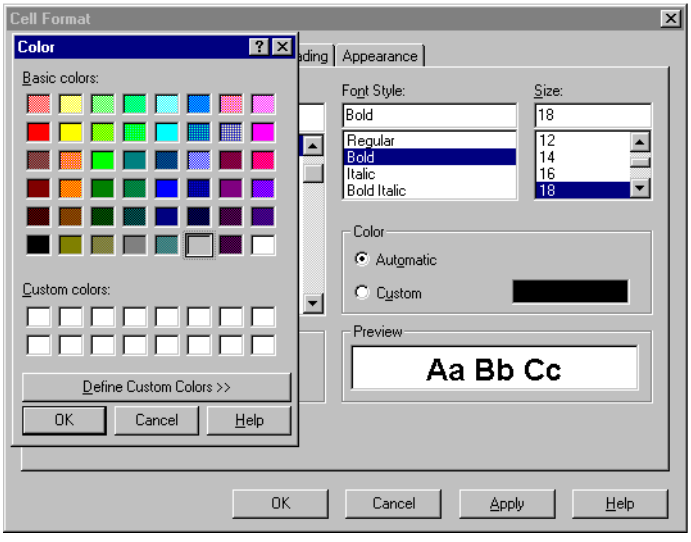



2. Click the **Font** tab.

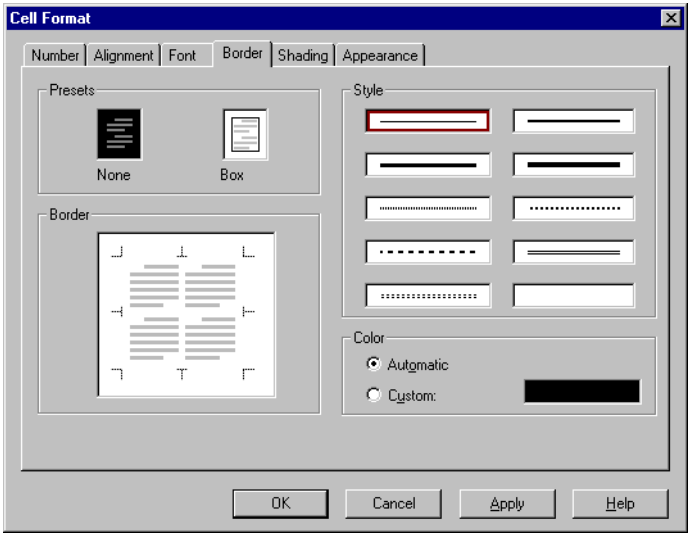



3. Click **18** under **Size** and click **Bold** under **Font Style**.

4. Click the **Custom Color** box and click **gray** from the palette, then click **OK**.




5. Click the **Borders** tab.




6. Click the **None** in the **Presets** box to remove the border from the title.
7. Click **OK** to close the Format Cell dialog box and save your changes.

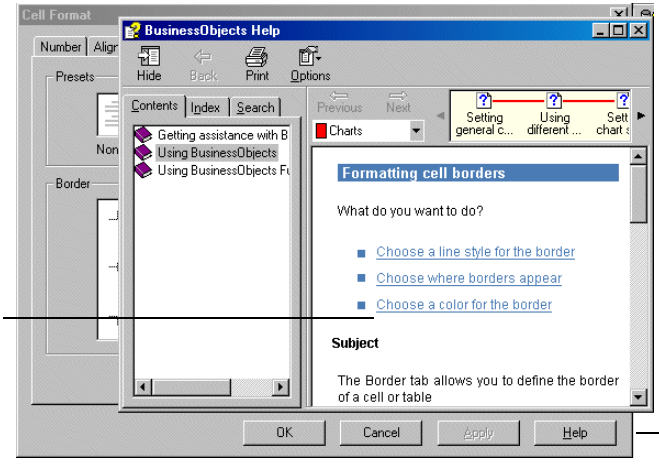
Your report title now looks like this:

Revenue for Year 2003

**NOTE**

If you need an explanation of any of the options in the dialog boxes:

- Click **Help** on the dialog box.
- Click **F1** on your keyboard.




Help screen

Click Help to get help with how to use these options

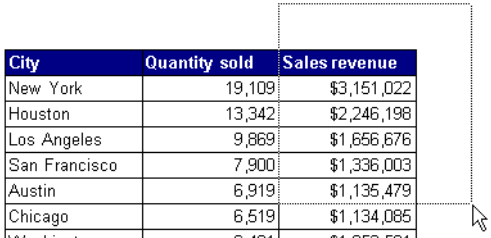
A Help screen opens with short explanations of how to use each option on the dialog box.

# Display data in a chart

You are going to display some of the data in the table in a chart. To do this, you are going to copy the table, edit it and then turn it into a chart.

To copy the table:

1. Click and hold the left mouse button, draw a box over a part of the table.



| City | Quantity sold | Sales revenue |
|---|---|---|
| New York | 19,109 | $3,151,022 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| San Francisco | 7,900 | $1,336,003 |
| Austin | 6,919 | $1,135,479 |
| Chicago | 6,519 | $1,134,085 |
| Washington | 6,491 | $1,053,581 |
| Boston | 5,269 | $887,169 |
| Colorado Springs | 5,116 | $843,584 |
| Miami | 4,830 | $811,924 |
| Dallas | 4,932 | $803,421 |
| | **Sum:** | **$15,059,143** |

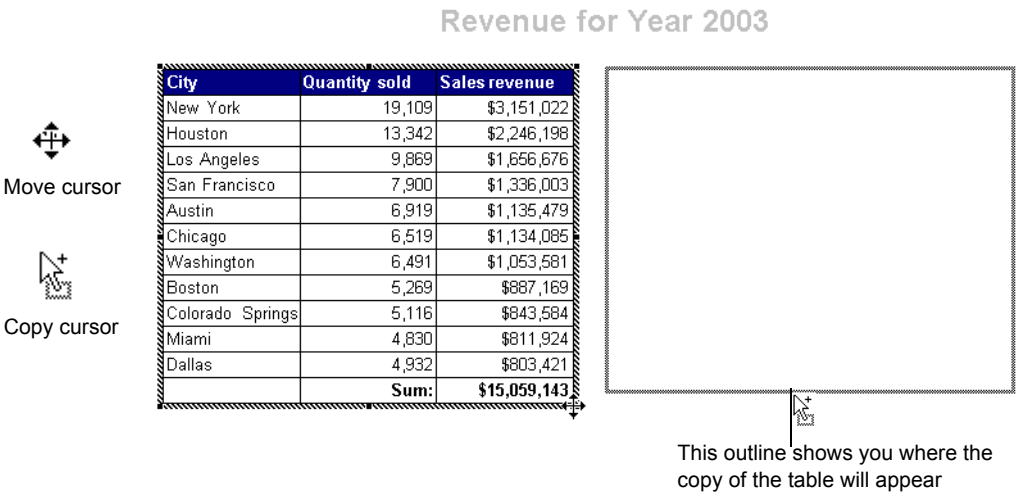
2. Release the mouse.

   A hatched gray border appears around the table.

| City | Quantity sold | Sales revenue |
|---|---|---|
| New York | 19,109 | $3,151,022 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| San Francisco | 7,900 | $1,336,003 |
| Austin | 6,919 | $1,135,479 |
| Chicago | 6,519 | $1,134,085 |
| Washington | 6,491 | $1,053,581 |
| Boston | 5,269 | $887,169 |
| Colorado Springs | 5,116 | $843,584 |
| Miami | 4,830 | $811,924 |
| Dallas | 4,932 | $803,421 |
| | **Sum:** | **$15,059,143** |

3. Move the cursor over the table. When the cursor changes to the move cursor,

hold down the left mouse button and drag the cursor to the right of the table.




4. Hold the **Ctrl** key.
   The cursor changes to the copy cursor.
5. Release the mouse.
   The table copies in the new location.

**You are now going to delete the Quantity sold column.**

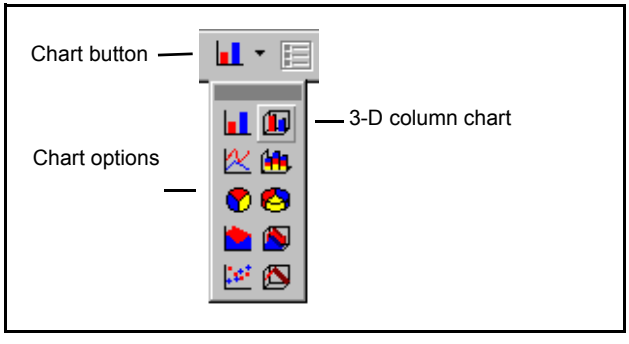
To do this:

1. Hold the cursor over the **Quantity sold** column.
2. Click once, when the cursor changes to a black arrow pointing downwards.
   The Quantity sold column is highlighted.

| City | Quantity sold | Sales revenue |
|---|---|---|
| New York | 19,109 | $3,151,022 |
| Houston | 13,342 | $2,246,198 |
| Los Angeles | 9,869 | $1,656,676 |
| San Francisco | 7,900 | $1,336,003 |
| Austin | 6,919 | $1,135,479 |
| Chicago | 6,519 | $1,134,085 |
| Washington | 6,491 | $1,053,581 |
| Boston | 5,269 | $887,169 |
| Colorado Springs | 5,116 | $843,584 |
| Miami | 4,830 | $811,924 |
| Dallas | 4,932 | $803,421 |
| | **Sum:** | **$15,059,143** |

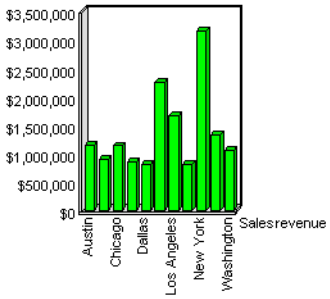
Delete

3. Click **Delete** on the **Standard** toolbar.
   The Quantity sold column disappears from the table.
4. Select the table.
5. Click **Chart** on the **Report** toolbar.
   A menu of chart types displays.




6. Click **3-D column chart**.

The data in the table displays in a chart.

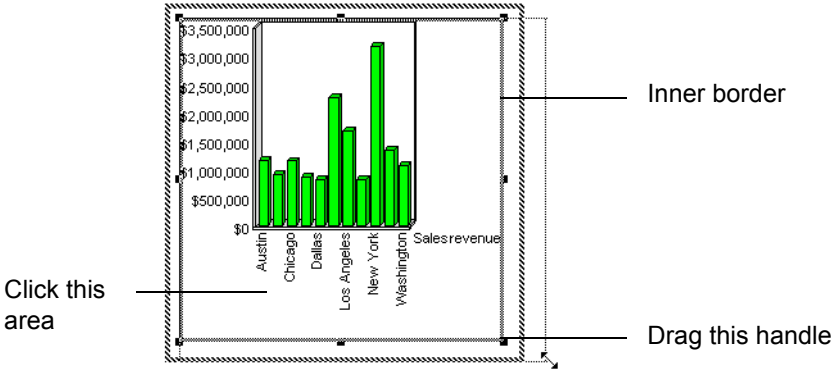



## Resize the chart

The chart is not large enough to display all the city names so you need to resize it. To do this:

1. Click once on the chart just under one of the city names.

   Two borders should display. If only the outer border displays, click again just under one of the city names.



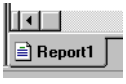

Resize cursor

2. Move your cursor over the handle on the right-hand corner of the inner border.
3. When the resize cursor displays, hold down the left mouse button and drag the corner to the right to resize the chart.
4. When all the city names display, release the mouse.

# Rename your report

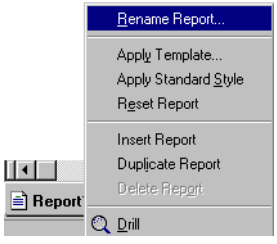
When you create a new BusinessObjects document or insert a new report, the report is given a default name Report 1 (2, 3 etc.).

To give your report a more meaningful name:

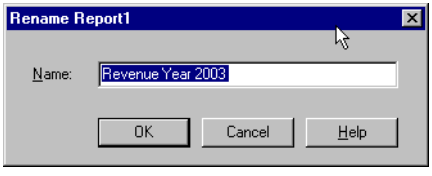



Report tab

1. Right-click the report tab and select **Rename** from the menu.



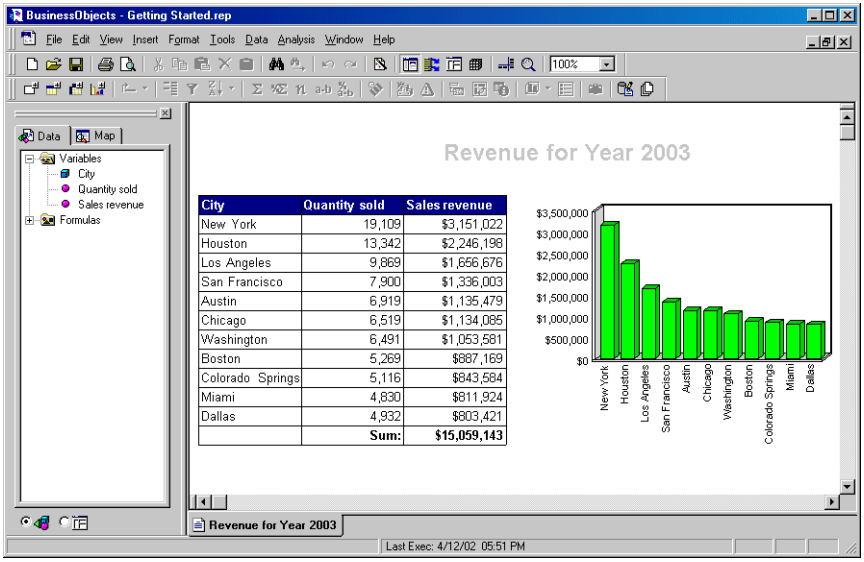

2. Enter a name for the report, *Revenue Year 2003*, and click **OK**.




The new name displays on the report tab.

# The finished report

Congratulations! You've created your first BusinessObjects report. Your final report looks like this:



# How Do Regional And Seasonal Differences Affect Revenue?

lesson 2

# Overview

In this lesson:

- **Business question**

How is revenue affected by regional and seasonal differences?

- **Learning objective**

Manipulate variables using drag and drop; organize a report in sections and rank data.

- **Time**

15 minutes

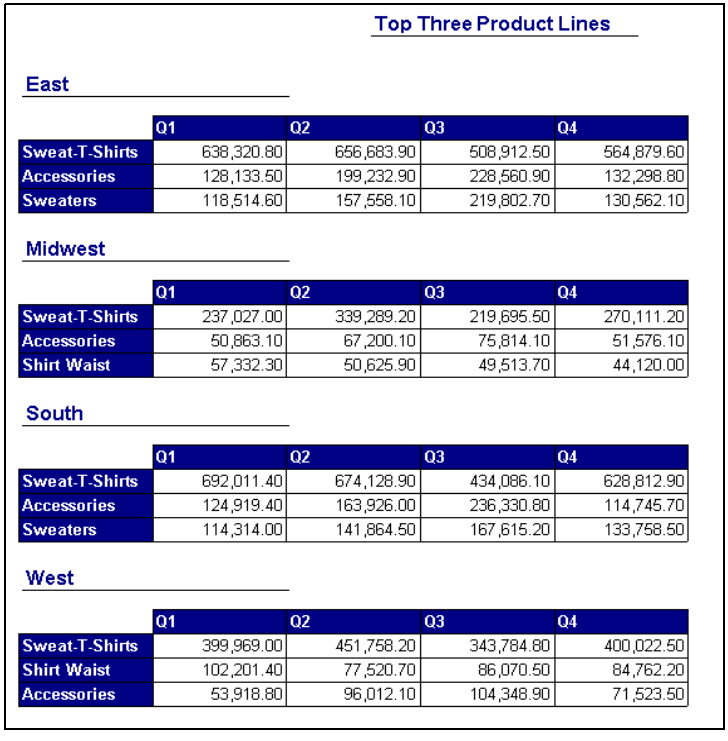
- **Finished report**

Efashion.rep, Revenue by Region

# Objective

In lesson 1, you built a report to get a high-level view of the sales revenue generated by your eFashion outlets. You now want to look at sales revenue in more detail to see how this revenue is affected by seasonal and regional differences. To get a more detailed view, you need to bring in some more data.

This lesson takes you through all the steps needed to build the following report showing the top three product lines in four eFashion regions:



**Top Three Product Lines**

**East**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 638,320.80 | 656,683.90 | 508,912.50 | 564,879.60 |
| Accessories | 128,133.50 | 199,232.90 | 228,560.90 | 132,298.80 |
| Sweaters | 118,514.60 | 157,558.10 | 219,802.70 | 130,562.10 |

**Midwest**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 237,027.00 | 339,289.20 | 219,695.50 | 270,111.20 |
| Accessories | 50,863.10 | 67,200.10 | 75,814.10 | 51,576.10 |
| Shirt Waist | 57,332.30 | 50,625.90 | 49,513.70 | 44,120.00 |

**South**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 692,011.40 | 674,128.90 | 434,086.10 | 628,812.90 |
| Accessories | 124,919.40 | 163,926.00 | 236,330.80 | 114,745.70 |
| Sweaters | 114,314.00 | 141,864.50 | 167,615.20 | 133,758.50 |

**West**

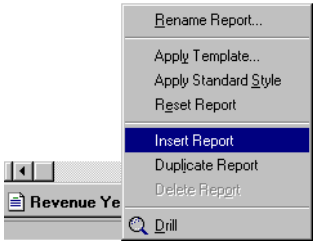
| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 399,969.00 | 451,758.20 | 343,784.80 | 400,022.50 |
| Shirt Waist | 102,201.40 | 77,520.70 | 86,070.50 | 84,762.20 |
| Accessories | 53,918.80 | 96,012.10 | 104,348.90 | 71,523.50 |

# Insert a new report

You're going to build a second report in the same BusinessObjects document so first let's insert a new report tab.

1. Right-click **Revenue in Year 2003** report tab and click **Insert Report** from the menu.

   A new, blank report appears. Let's give the report a name right away.

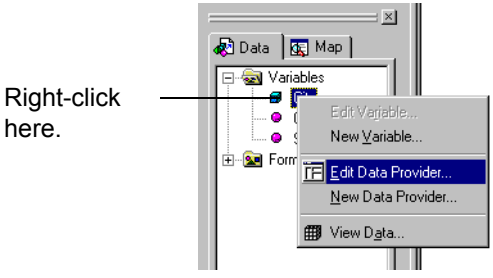



2. Right-click on new report tab and select **Rename Report** from the menu
3. Type in *Revenue by Region* in the Rename Report box and click **OK**.

# Get more data

The Report Manager Data tab currently shows that you have data for City, Sales revenue and Quantity sold stored in your BusinessObjects document. To build the new report, you need to use the Query Panel to get some more data. To do this:

1. Right-click on any variable in the list in the **Data** tab of the Report Manager and click **Edit Data Provider** from the menu.




   The Query Panel displays. You are going to keep the data you already have in the report and add some data to allow you to get a more detailed look at your business.

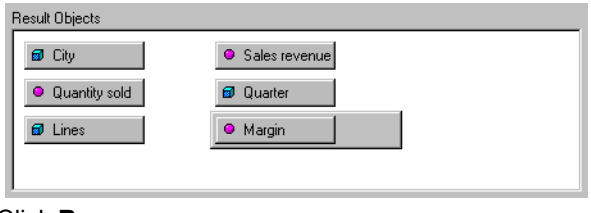
2. Open the **Time Period** folder and double-click on **Quarter**.

   Quarter appears in the Result Objects.

3. Open the **Product** folder and double-click **Lines**.

4. Open the **Measures** folder and double-click **Margin**.

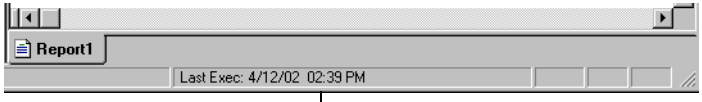
   Six objects display in Results Objects.




5. Click **Run**.

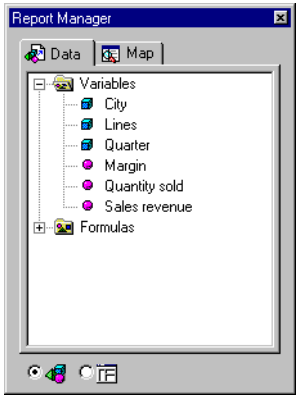
   It will take a few moments for the query to run. The status bar displays messages, for example, *Connecting to the database.....*, to inform you what

BusinessObjects is currently doing.



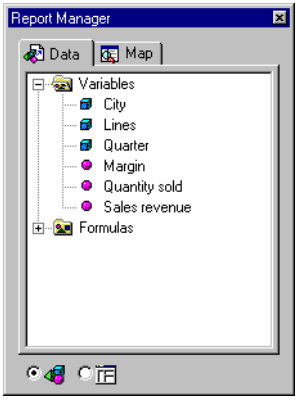

Watch this area here for messages while the query is running

The new data displays in the Report Manager Data tab. You can use this data to build your report.




Quarter, Lines and Margin are added to the data stored in the document.

*Report Manager and BusinessObjects data types*




*The Report Manager Data tab displays a list of the data stored in your BusinessObjects document. Business Objects qualifies data used in BusinessObjects in three ways. This qualification shows how data can be used in reports.*

**Dimension**

*Dimension objects provide the basis for analysis in a report. Dimension objects typically retrieve character-type data (customer names, city names, etc.), or dates (years, quarters, invoice dates, etc.)*

**Detail**

*A detail object is always associated to one dimension object, on which it provides additional information. For example,* Address *is a detail object associated to* Store.

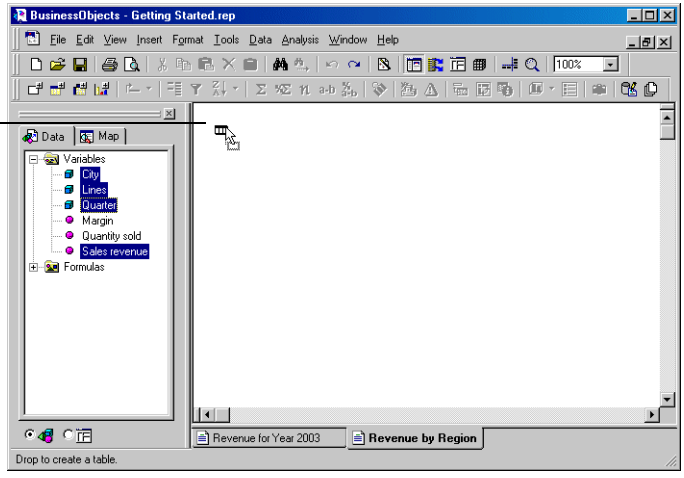
**Measure**

*Measure objects retrieve numeric data that is the result of calculations on data on the database. Measure objects are semantically dynamic: the values they return depend on the objects they are used with. For example, if you include* City *and* Sales Revenue *in a table, revenue per city is calculated. If you include* Year *and* Sales Revenue*, revenue per year is calculated.*

# Display data in a table

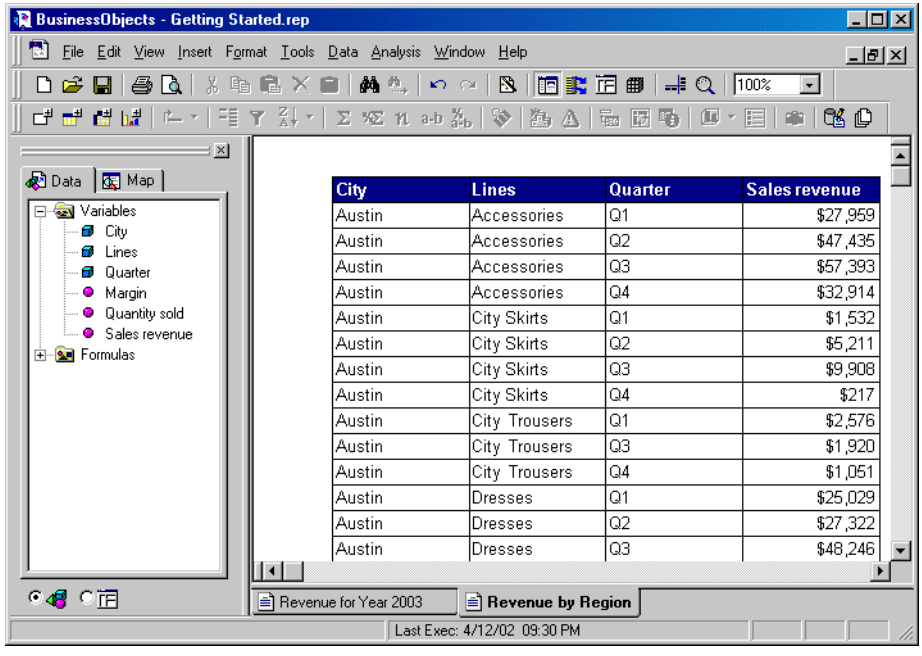
To build the next report, you're going to add a new table by dragging data from the Report Manager Data tab to the Report window. To do this:

1. In the **Report Manager** select **City**.
2. Holding down the Ctrl key select **Lines**, **Quarter** and **Sales Revenue**.
3. Drag the selected objects from the Report Manager window into the Report window.




The cursor changes to the table insert table cursor and the status bar displays the message *Drop to create a table*.

When you release the mouse, the data you selected displays in a table:




| City | Lines | Quarter | Sales revenue |
|---|---|---|---|
| Austin | Accessories | Q1 | $27,959 |
| Austin | Accessories | Q2 | $47,435 |
| Austin | Accessories | Q3 | $57,393 |
| Austin | Accessories | Q4 | $32,914 |
| Austin | City Skirts | Q1 | $1,532 |
| Austin | City Skirts | Q2 | $5,211 |
| Austin | City Skirts | Q3 | $9,908 |
| Austin | City Skirts | Q4 | $217 |
| Austin | City Trousers | Q1 | $2,576 |
| Austin | City Trousers | Q3 | $1,920 |
| Austin | City Trousers | Q4 | $1,051 |
| Austin | Dresses | Q1 | $25,029 |
| Austin | Dresses | Q2 | $27,322 |
| Austin | Dresses | Q3 | $48,246 |

# Organize the data in sections

There is a lot of data in the report and you can organize it so that it will be easier to read. First, you show data for each city per quarter. By creating a section in the report for each city you will see the sales revenue for each city per quarter more easily.

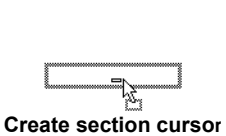
To do this:

1. Click once in the **City** column.

   The City column is highlighted.

2. Click again in the **City** column, hold down your left mouse button and drag the cursor out of the table and position it over the top left of the table.

   As you move the cursor out of the table, the cursor changes to the create section cursor.

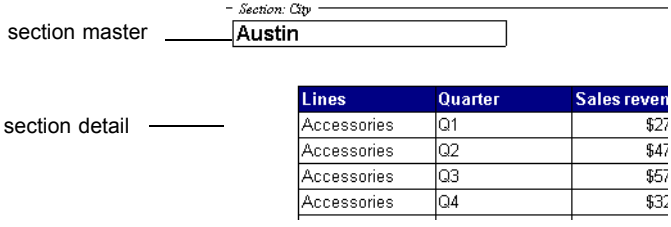


**Create section cursor**

| City | Lines | Quarter | Sales revenue |
|---|---|---|---|
| Austin | Accessories | Q1 | $27,959 |
| Austin | Accessories | Q2 | $47,435 |
| Austin | Accessories | Q3 | $57,393 |
| Austin | Accessories | Q4 | $32,914 |
| Austin | City Skirts | Q1 | $1,532 |

3. When the cursor changes to the create section cursor and the status bar displays *Drop to move contents and create a section*, release the mouse.

   The City column disappears from the table and a section for each of the eleven values of City appears. Scroll down the report to look at the different City sections. This type of report is called a master/detail report.




You can make the report even clearer by changing the format of the table. At the moment each row of the table displays sales revenue per line per quarter which means that quarter and line names are repeated. You can remove this repetition by turning the table into a crosstab.

To do this:

1. Click once in the **Quarter** column.

   The Quarter column is highlighted.

2. Click the **Quarter** column again, hold down your left mouse button, and drag the cursor to the top right-hand corner of the table.

Austin

| Lines | Quarter | Sales revenue |
|---|---|---|
| Accessories | Q1 | $27,95 |
| Accessories | Q2 | $47,43 |
| Accessories | Q3 | $57,39 |

3. When the **Turn To Crosstab** cursor appears and the status bar displays *Drop to turn into a crosstab*, release the mouse.

Turn to crosstab cursor

The Quarter column disappears from the table and the names of the quarters display in the top row of the crosstab. The names of the product lines display in the left column of the crosstab. Sales Revenue displays in the body of the crosstab.

Austin

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Accessories | $27,959 | $47,435 | $57,393 | $32,914 |
| City Skirts | $1,532 | $5,211 | $9,908 | $217 |
| City Trousers | $2,576 | Discontinued | $1,920 | $1,051 |
| Dresses | $25,029 | $27,322 | $48,246 | $17,314 |
| Jackets | $10,739 | $2,816 | $6,430 | $6,601 |
| Leather | $1,790 | Discontinued | $1,253 | $707 |
| Outerwear | $566 | Discontinued | $238 | $304 |
| Overcoats | $2,567 | Discontinued | $1,368 | $999 |
| Shirt Waist | $37,395 | $28,324 | $26,091 | $29,372 |
| Sweaters | $28,010 | $37,915 | $46,752 | $37,391 |
| Sweat-T-Shirts | $171,020 | $117,437 | $90,901 | $121,766 |
| Trousers | $5,248 | $7,149 | $4,300 | $4,009 |

To find the sales revenue for Accessories in Austin in Q1, look in the Austin section, locate Q1 in the top row and Accessories in the left column. The cell that forms the intersection of these two values gives you the sales revenue for Accessories in Q1 in Austin.

**TIP**

*When you create the crosstab, move the cursor slowly to the top right-hand corner of the cell that displays the title Sales Revenue. You have to get the cursor into just the right position for it to become the Turn To Crosstab cursor.*

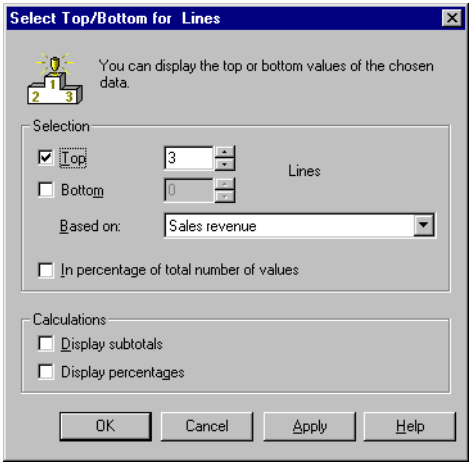
# Rank top three product lines

You now have a report that shows you how product lines performed in the different cities. What you'd like to do now is see which lines generated the top revenue in each quarter for each city. To do this, you're going to rank the product lines according to the revenue generated:

1. Click the **Lines** column, where Accessories appears to highlight the column.
2. Click **Apply Ranking** on the **Report** toolbar.


**Ranking**

The Select Top/Bottom for Lines dialog box opens.




3. Click the **Top** check box.

   By default, BusinessObjects displays the top three.
4. Verify that Sales revenue appears in the Based on list box.
5. Click **OK**.

   The top three revenue-making lines display in each crosstab.

| Austin | | | | |
|---|---|---|---|---|
| | Q1 | Q2 | Q3 | Q4 |
| Sweat-T-Shirts | $171,020 | $117,437 | $90,901 | $121,766 |
| Accessories | $27,959 | $47,435 | $57,393 | $32,914 |
| Sweaters | $28,010 | $37,915 | $46,752 | $37,391 |

# Insert a report title

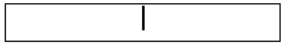
Let's now add a title to the report to make it clear what the report is about. To add a title to your report, you first have to insert a cell. The cell is a container for the text in your title.

**To insert a cell:**

Insert Cell button

1. Click **Insert Cell** on the **Report** toolbar.
   The cursor changes to the Insert Cell cursor.
2. Click once at the top of the page to insert a new cell.
3. When you insert a new cell, a flashing cursor appears inside so that you can type in text.

Insert Cell cursor



4. Type in a title for the report, *Top Three Product Lines*, and press **Enter**.

**TIP**

*To edit cell contents, double-click the cell. When the contents highlight, type your changes and then press Enter.*

---

**To re-size the title cell:**

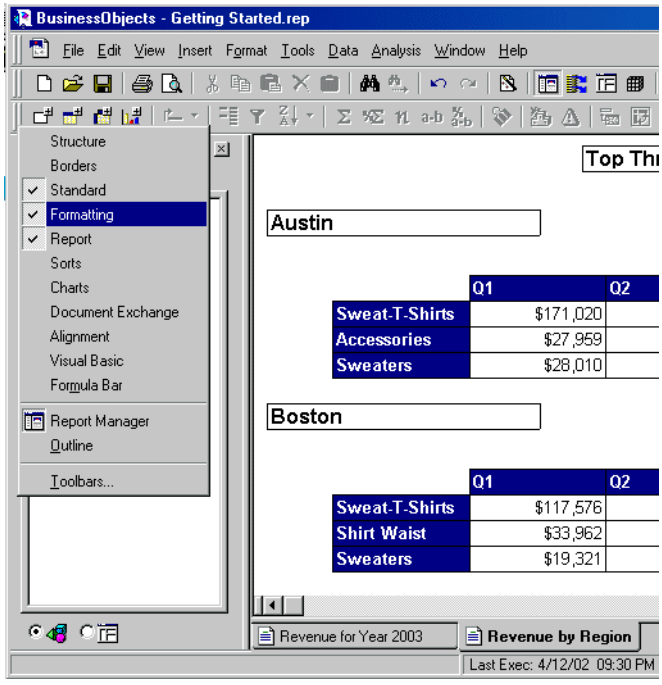
1. Hold your cursor over the right edge of the title cell.
2. When the Resize icon appears, hold down your left mouse button and drag the cell border.
   - To make the cell smaller, drag to the left.
   - To make the cell wider, drag to the right.
3. Release the mouse when the entire cell contents display.

## Format the title

Let's format the cell a little differently. In the previous lesson you used a dialog box to change cell formatting. This time you're going to use the Formatting toolbar.

First, open the Formatting toolbar. To do this:

- Right-click the **Standard** toolbar and click **Formatting** from the menu.




The Formatting toolbar displays.

**To format the title cell:**

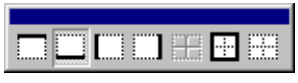
1. Click once on the title cell to highlight the cell.
2. Click **Font Color,** on the **Formatting** toolbar.

**Font Color**

The Color Palette opens.

3. Choose **Dark Blue** from the palette and click **OK**.
4. While selecting the title cell, click the drop-down arrow next to Borders to display the Borders options.

**Borders**



**Borders options**

No Borders

Bottom Border

5. Click **No Borders**.
6. Click **Borders**.
7. Click **Bottom Border**.
8. Click once outside the title cell to display the result.

   The title is blue and underlined.

Top Three Product Lines

You have spent some time getting this formatting just right. You can now copy this formatting to other cells in the report so that your report design is consistent.

**To copy formatting:**

1. Select the title cell.
2. Click **Copy** on the **Standard** toolbar.
3. Select the cell that contains the name of the city Austin.
4. Click **Paste Format** on the **Standard** toolbar.

   The formatting only, and not the content, of the title cell copies to the Austin cell. Notice that all the cells containing city names are also re-formatted. Any changes you make to one section of a master/detail report are applied to all sections.

Copy

Paste Format

Top Three Product Lines

Austin

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $171,020 | $117,437 | $90,901 | $121,766 |
| Accessories | $27,959 | $47,435 | $57,393 | $32,914 |
| Sweaters | $28,010 | $37,915 | $46,752 | $37,391 |

Boston

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $117,576 | $126,658 | $94,931 | $119,385 |
| Shirt Waist | $33,962 | $23,707 | $32,843 | $29,848 |
| Sweaters | $19,321 | $19,695 | $27,350 | $21,086 |

Chicago

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $123,742 | $214,167 | $117,181 | $155,263 |
| Accessories | $32,175 | $41,955 | $42,920 | $31,579 |
| Shirt Waist | $36,024 | $29,953 | $27,196 | $24,463 |

Colorado Springs

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $113,285 | $125,123 | $102,515 | $114,849 |
| Accessories | $18,688 | $25,245 | $32,894 | $19,997 |
| Shirt Waist | $21,309 | $20,673 | $22,318 | $19,657 |

# Group cities into regions

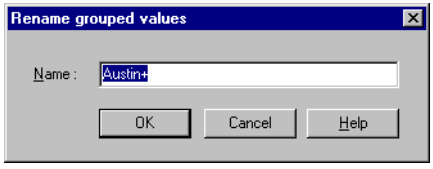
You would like to organize your report to look at regional differences in sales revenue. Your database has data for cities but it doesn't have data for regions. No problem. Since you have the data for cities, you can group the cities into the regions of your choice in your report and then calculate sales revenue by region.

To do this:

1. Click the cell that displays the city Austin.
2. While pressing the Ctrl key, select **Houston**, then **Dallas** and **Miami**.
3. Click **Group Values** on the **Report** toolbar.

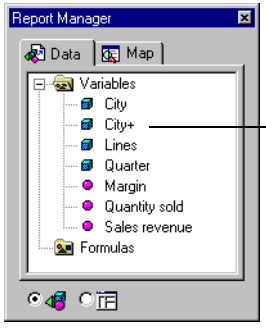
Group Values

The *Rename grouped values* dialog box opens.




4. Enter **South**, and click **OK**.

All the data for the cities of Austin, Houston, Dallas, and Miami group together into one section, South. A new variable, City+, displays in the list in the Report Manager Data tab.




A new variable, City+ displays in the Data tab.

**South**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| **Sweat-T-Shirts** | $571,822 | $553,369 | $354,840 | $525,501 |
| **Accessories** | $104,535 | $138,931 | $199,652 | $96,882 |
| **Sweaters** | $100,839 | $117,049 | $134,671 | $116,468 |

5. Repeat Step 1 to Step 4 to:
   - group San Francisco and Los Angeles and rename West,
   - group New York, Boston and Washington and rename East,
   - group Chicago and Colorado Springs and rename Midwest.

   Your report now has four sections.

**Top Three Product Lines**

**East**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $638,321 | $656,684 | $508,913 | $564,880 |
| Accessories | $128,134 | $199,233 | $228,561 | $132,299 |
| Sweaters | $118,515 | $157,558 | $219,803 | $130,562 |

**Midwest**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $237,027 | $339,289 | $219,696 | $270,111 |
| Accessories | $50,863 | $67,200 | $75,814 | $51,576 |
| Shirt Waist | $57,332 | $50,626 | $49,514 | $44,120 |

**South**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $692,011 | $674,129 | $434,086 | $628,813 |
| Accessories | $124,919 | $163,926 | $236,331 | $114,746 |
| Sweaters | $114,314 | $141,865 | $167,615 | $133,759 |

**West**

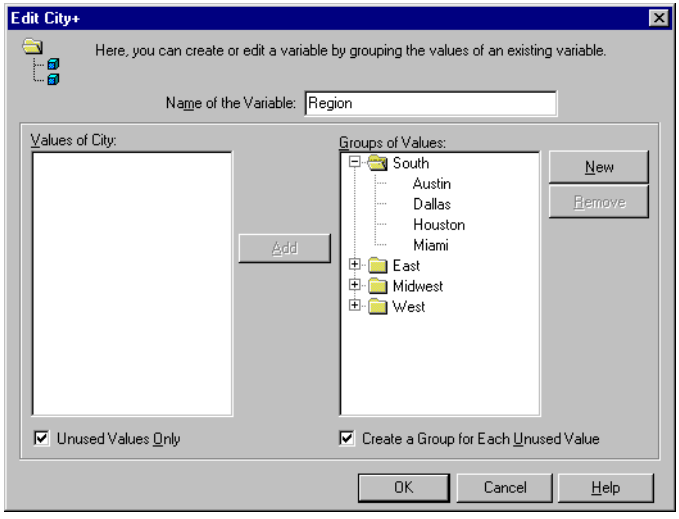
| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $399,969 | $451,758 | $343,785 | $400,023 |
| Shirt Waist | $102,201 | $77,521 | $86,071 | $84,762 |
| Accessories | $53,919 | $96,012 | $104,349 | $71,524 |

Let's rename City+ in the list in the Report Manager Data tab.

To do rename the variable City+:

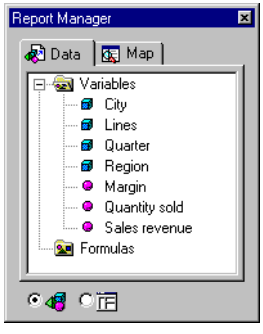
1. Right-click on **City+** in the Report Manager **Data** tab.
2. Choose **Edit Variable** from the menu.

   The Edit dialog box opens.




3. Type in a new name, **Region**, in the **Name of the Variable** text box and click **OK**.

   Region displays in the list in the Report Manager Data tab.



# The finished report

Your finished report looks like this:

**Top Three Product Lines**

**East**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 638,320.80 | 656,683.90 | 508,912.50 | 564,879.60 |
| Accessories | 128,133.50 | 199,232.90 | 228,560.90 | 132,298.80 |
| Sweaters | 118,514.60 | 157,558.10 | 219,802.70 | 130,562.10 |

**Midwest**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 237,027.00 | 339,289.20 | 219,695.50 | 270,111.20 |
| Accessories | 50,863.10 | 67,200.10 | 75,814.10 | 51,576.10 |
| Shirt Waist | 57,332.30 | 50,625.90 | 49,513.70 | 44,120.00 |

**South**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 692,011.40 | 674,128.90 | 434,086.10 | 628,812.90 |
| Accessories | 124,919.40 | 163,926.00 | 236,330.80 | 114,745.70 |
| Sweaters | 114,314.00 | 141,864.50 | 167,615.20 | 133,758.50 |

**West**

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | 399,969.00 | 451,758.20 | 343,784.80 | 400,022.50 |
| Shirt Waist | 102,201.40 | 77,520.70 | 86,070.50 | 84,762.20 |
| Accessories | 53,918.80 | 96,012.10 | 104,348.90 | 71,523.50 |

# Navigate through your reports

You saw earlier that the Report Manager displays all the data in your report. You can also use the Report Manager to navigate through the reports in your document.

To do this:

1. Click the **Map** tab in the Report Manager.

   The Report Manager Map pane displays a list of all the reports in your document. It also displays the region section names for the report that is currently displayed.


2. Click **West** under the Revenue by Region report.

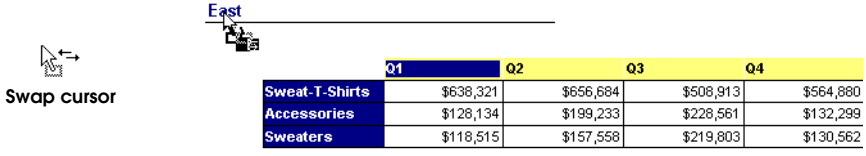
   The data for West displays in the report window.

# Get a different viewpoint

Your report is currently organized so that one section appears per region and you see the top-selling product lines in each region. You can get a different view of your data by viewing by quarters instead of region.

To do this:

1. Click in the **Quarter** row.
2. Click and hold the **Quarter** row again, then drag the cursor over **Region** cell.
3. When the cursor changes to the Swap cursor and the status bar reads *Drop to swap contents*, release the mouse.




| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sweat-T-Shirts | $638,321 | $656,684 | $508,913 | $564,880 |
| Accessories | $128,134 | $199,233 | $228,561 | $132,299 |
| Sweaters | $118,515 | $157,558 | $219,803 | $130,562 |

Region moves to the crosstab and the report now has one section for each quarter.


| | East | Midwest | South | West |
|---|---|---|---|---|
| Sweat-T-Shirts | $638,321 | $237,027 | $692,011 | $399,969 |
| Shirt Waist | $166,482 | $57,332 | $169,563 | $102,201 |
| Accessories | $128,134 | $50,863 | $124,919 | $53,919 |

You see that Sweat-T-Shirts were the top-selling articles for all four quarters this year.

# Which Cities Are Making The Best Margin?

lesson 3

# Overview

In this lesson:

- **Business question**

Which cities are generating the best margin?

- **Learning objective**

Use the Formula Editor to make calculations and create variables; use alerters to highlight interesting data.

- **Time**

15 minutes

- **Finished report**

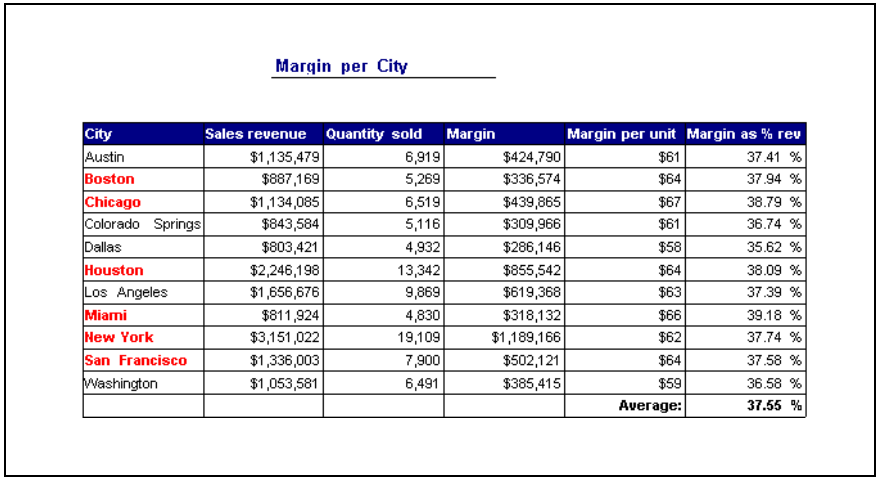
Efashion.rep, Margin Analysis

# Objective

You want to highlight the cities that generate the best margin. To do this, you need to do some calculations on the data in your report and create your own report variables.

This time, instead of using a blank report and building from scratch, you're going to base your new report on the one you built in the previous lesson and re-arrange the data in it.

This lesson takes you through all the steps needed to build the following report:



Margin per City

| City | Sales revenue | Quantity sold | Margin | Margin per unit | Margin as % rev |
|---|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | $61 | 37.41 % |
| Boston | $887,169 | 5,269 | $336,574 | $64 | 37.94 % |
| Chicago | $1,134,085 | 6,519 | $439,865 | $67 | 38.79 % |
| Colorado Springs | $843,584 | 5,116 | $309,966 | $61 | 36.74 % |
| Dallas | $803,421 | 4,932 | $286,146 | $58 | 35.62 % |
| Houston | $2,246,198 | 13,342 | $855,542 | $64 | 38.09 % |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | $63 | 37.39 % |
| Miami | $811,924 | 4,830 | $318,132 | $66 | 39.18 % |
| New York | $3,151,022 | 19,109 | $1,189,166 | $62 | 37.74 % |
| San Francisco | $1,336,003 | 7,900 | $502,121 | $64 | 37.58 % |
| Washington | $1,053,581 | 6,491 | $385,415 | $59 | 36.58 % |
| | | | | Average: | 37.55 % |

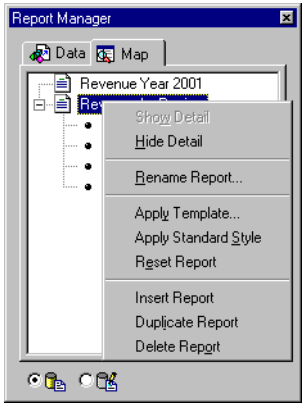
# Reorganize a report

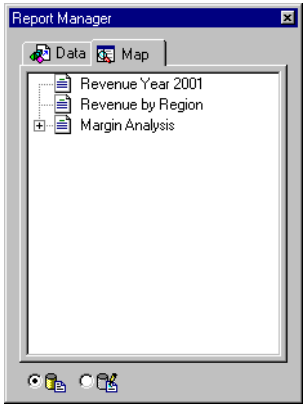
You're going to use the report you built in the previous lesson as a base for building your new report, so the first step is to duplicate the base report.

## Duplicate a report

To duplicate an existing report:

1. Click the **Map** tab in the Report Manager.
2. Right-click on the report **Revenue by Region** in the list in the Report Manager Map tab and select **Duplicate Report** from the menu.




The report, Revenue by Region (1) appears in the Report Manager Map list.

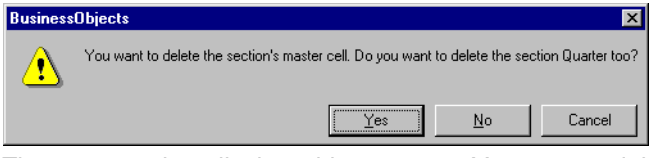
3. Double-click on **Revenue by Region (1)** in the Report Manager Map list.
4. Type a new name for the report **Margin Analysis**.

You now have three reports in your document.

## Remove the sections

This report will have only one main section so you are going to remove the sections. To do this:

1. Select the **Q1** cell and click **Delete** on the **Standard** toolbar.




The message box displays this message: You want to delete the section's

master cell. Do you want to delete the section Quarter too?

2. Click **Yes** to delete the master cell and the section from the report.

   Your report now has one section.

## Turn the crosstab into a table

You want to display your data in a table and not a crosstab. To turn the crosstab into a table:

1. Click in the **Region** row.
2. Click the **Region** row again. While holding the left mouse button, drag the cursor over the left column of the crosstab.
3. When a horizontal line appears above the cursor, and the status bar reads, *Drop to turn into a table*, release the mouse button.

Turn into a table cursor

| | East | Midwest | South | West |
|---|---|---|---|---|
| Sweat-T-Shirts | $2,368,797 | $1,066,123 | $2,429,039 | $1,595,535 |
| Accessories | $688,226 | $245,453 | $639,922 | $325,803 |
| Sweaters | $626,438 | $186,022 | $557,552 | $290,029 |

## Delete a column of data

You do not need the data for Lines in this report so you can delete the column that contains this data.

To do this:

1. Select the **Lines** column.

| Lines | Region | Sales revenue |
|---|---|---|
| Sweat-T-Shirts | East | $2,368,797 |
| Sweat-T-Shirts | Midwest | $1,066,123 |
| Sweat-T-Shirts | South | $2,429,039 |
| Sweat-T-Shirts | West | $1,595,535 |
| Accessories | East | $688,226 |
| Accessories | Midwest | $245,453 |
| Accessories | South | $639,922 |
| Accessories | West | $325,803 |
| Sweaters | East | $626,438 |
| Sweaters | Midwest | $186,022 |
| Sweaters | South | $557,552 |
| Sweaters | West | $290,029 |

2. Right-click then select **Delete** from the menu.

## Give the report a title

1. Double-click the **title** cell.
2. Type a new title for the report, **Margin per City**.

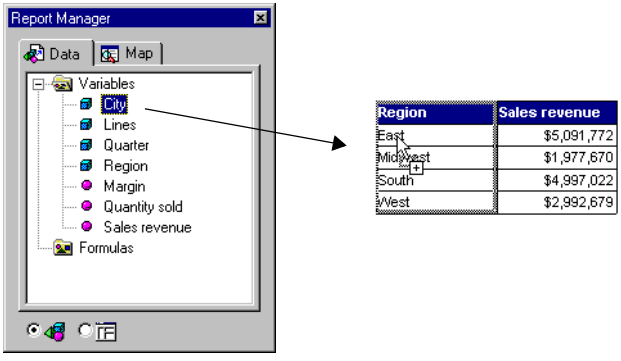
# Add data to the table

The data you want to use for this report is already available in the document. All you have to do to continue building your new report is add the data to your table from the Report Manager Data tab.

**First, you're going to replace Region with City.**

To do this:

1. Click the **Data** tab in the Report Manager.
2. In the Report Manager Data tab, select **City** in the variables list.
3. Click City once more and, holding down your left mouse button, drag the cursor over the Region column.




4. When the Region column highlights with a gray hatched border and the status bar displays the message *Drop to replace contents*, release the mouse.

   The data for City replaces the data in the Region column.

**Next, you're going to add Quantity sold and Margin to the table.**

To do this:

1. From the Report Manager Data tab, select **Quantity sold** in the list of variables.
2. Click **Quantity sold** once more. While holding your left mouse button, drag the cursor to the right edge of the **Sales revenue** column.
3. Release the mouse when the edge of the column or row highlights with a gray

hatched border and the status bar displays the message *Drop to insert*,

| City | Sales revenue |
|---|---|
| Austin | $1,135,479 |
| Boston | $887,169 |
| Chicago | $1,134,085 |
| Colorado Springs | $843,584 |
| Dallas | $803,421 |
| Houston | $2,246,198 |
| Los Angeles | $1,656,676 |
| Miami | $811,924 |
| New York | $3,151,022 |
| San Francisco | $1,336,003 |
| Washington | $1,053,581 |

The data for Quantity sold appears in a new column.

| City | Sales revenue | Quantity sold |
|---|---|---|
| Austin | $1,135,479 | 6,919 |
| Boston | $887,169 | 5,269 |
| Chicago | $1,134,085 | 6,519 |
| Colorado Springs | $843,584 | 5,116 |
| Dallas | $803,421 | 4,932 |
| Houston | $2,246,198 | 13,342 |
| Los Angeles | $1,656,676 | 9,869 |
| Miami | $811,924 | 4,830 |
| New York | $3,151,022 | 19,109 |
| San Francisco | $1,336,003 | 7,900 |
| Washington | $1,053,581 | 6,491 |

4. Now, add **Margin** to the table in the same way you added Quantity sold.

# Calculate margin per unit

You saw in Lesson 1 that some calculations on data are carried out when you run a query and that you can make certain calculations on data in reports using toolbar buttons. You can also make calculations by writing formulas.

In this report you want to display in your table the margin per unit for each city. You have the necessary data, Sales revenue and Quantity sold, to calculate this figure already in your report.

**First, let's add a new column to the table to display this new data.**

To do this:

1. Click inside the **Margin** column.
2. Click the drop-down arrow next to **Structure** on the **Report** toolbar

**Structure**

The Structure options display.

3. Click I**nsert Column After**.

A new, empty column appears next to the Margin column.

4. Double-click in the blue cell at the top of the column.

This cell is called the header cell.

5. Type **Margin per unit** and press Enter.

| City | Sales revenue | Quantity sold | Margin | Margin per unit |
|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | |
| Boston | $887,169 | 5,269 | $336,574 | |
| Chicago | $1,134,085 | 6,519 | $439,865 | |
| Colorado Springs | $843,584 | 5,116 | $309,966 | |
| Dallas | $803,421 | 4,932 | $286,146 | |
| Houston | $2,246,198 | 13,342 | $855,542 | |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | |
| Miami | $811,924 | 4,830 | $318,132 | |
| New York | $3,151,022 | 19,109 | $1,189,166 | |
| San Francisco | $1,336,003 | 7,900 | $502,121 | |
| Washington | $1,053,581 | 6,491 | $385,415 | |

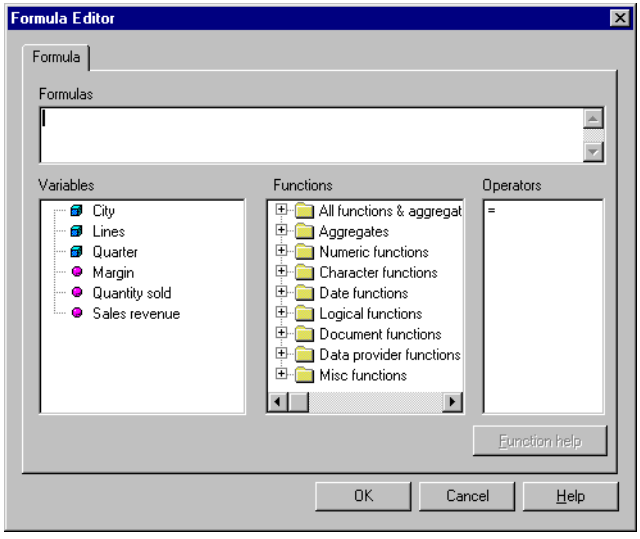
**To calculate margin per unit you need to write a formula which divides Margin by Quantity sold.**

To do this, you use the Formula Editor:

1. Click inside the **Margin per unit** column.
2. From the **Data** menu, click **Edit Formula**.

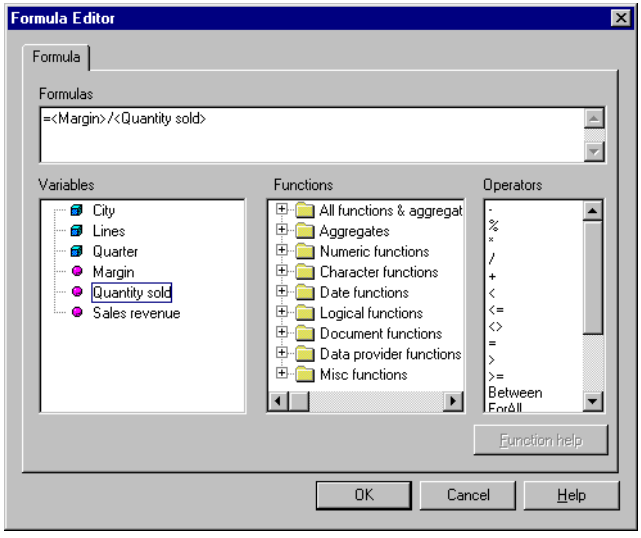
The Formula Editor opens. The Formula Editor guides you through creating

your formula by choosing Variables, Functions and Operators directly from the lists.




3. Double-click on the **equal sign (=)** in the Operators list.
   All BusinessObjects formulas must begin with an equal sign.
4. Double-click **Margin** in the Variables list.
5. Double-click the **division symbol (/)** in the Operators list.

6. Double-click **Quantity sold** in the Variables list.




7. Click **OK**.

   The result of the calculation appears in the Margin per unit column.

| City | Sales revenue | Quantity sold | Margin | Margin per unit |
|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | $61 |
| Boston | $887,169 | 5,269 | $336,574 | $64 |
| Chicago | $1,134,085 | 6,519 | $439,865 | $67 |
| Colorado Springs | $843,584 | 5,116 | $309,966 | $61 |
| Dallas | $803,421 | 4,932 | $286,146 | $58 |
| Houston | $2,246,198 | 13,342 | $855,542 | $64 |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | $63 |
| Miami | $811,924 | 4,830 | $318,132 | $66 |
| New York | $3,151,022 | 19,109 | $1,189,166 | $62 |
| San Francisco | $1,336,003 | 7,900 | $502,121 | $64 |
| Washington | $1,053,581 | 6,491 | $385,415 | $59 |

**NOTE**

The formula you create is stored in the formulas folder in the Report Manager Data tab.

# Create a local variable

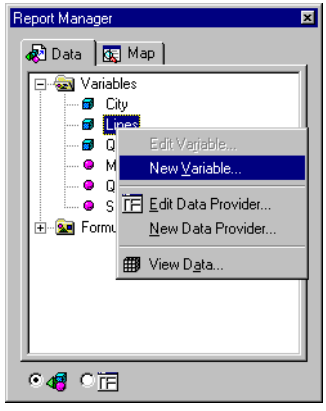
You have the data for sales revenue and margin but since your eFashion outlets are in cities of different size and importance you will get a better view of how the different cities are performing by showing margin as a percentage of overall sales revenue. Again, you are going to make this calculation yourself using data you already have in your report but this time instead of creating a formula, you are going to create a local variable.

A local variable is a formula with a name. It is called a local variable because it is only available in the document in which it was created. However, you can use a local variable to build tables and charts in exactly the same way as you use variables retrieved using a query.

**To create a local variable to calculate margin as a percentage of sales revenue:**

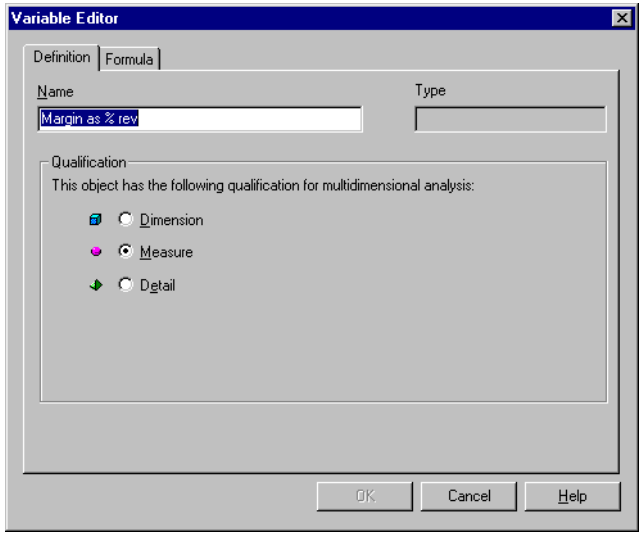
1. Right-click the **Variables** folder in the Report Manager **Data** tab and choose

**New Variable** from the menu.




The Variable Editor opens.

2. Click the **Definition** tab.
3. Type a name, *Margin as % rev*.
4. Click **Measure** to qualify the new variable as a measure.



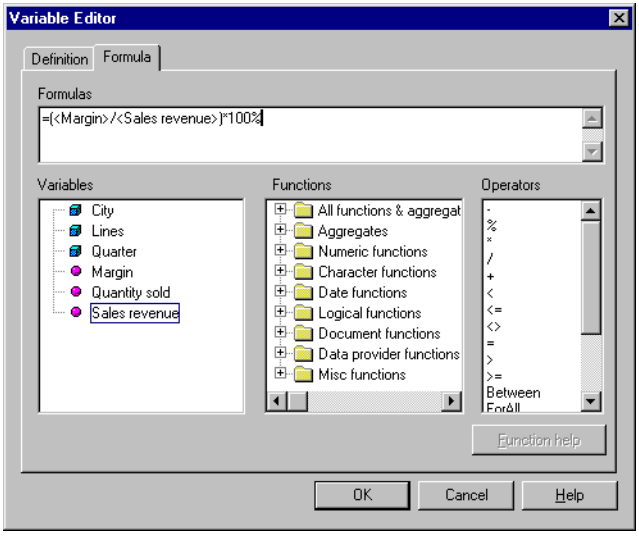

5. Click the **Formula** tab.

   The Formula Editor you used earlier displays. You build the formula for a local

variable by choosing from the lists in the Formula Editor as you saw earlier.

6. Double-click the **equal (=)** symbol in the Operators list.
7. Double-click the **open bracket (** symbol in the Operators list.
8. Double-click **Margin** in the Variables list.
9. Double-click the **division (/)** symbol in the Operators list.
10. Double-click **Sales revenue** in the Variables list.
11. Double-click the **close bracket )** symbol in the Operators list.
12. Double-click the **multiply by (*)** symbol in the Operators list.
13. Type **100%**.

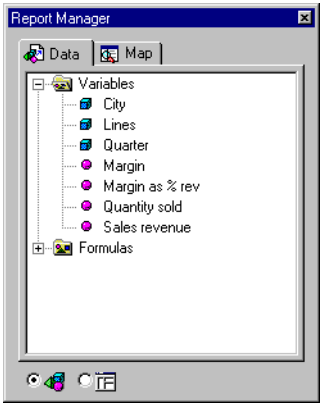
    Your formula looks like this:




14. Click **OK**.

**NOTE**

The variable you create appears in the list of variables in the Report Manager data tab.




## Add the new variable to the table

1. Add **Margin as % rev** to the table after the Margin per unit column in the same way you added Margin and Quantity sold.

   Notice that the data is not yet correctly formatted as a percentage.
2. Click inside the **Margin as % revenue** column.
3. Click **Percentage Style** from the **Formatting** toolbar.

   The data correctly formats as a percentage.

**Percentage Style**

# Highlight cities with above-average margin

You want to highlight all the cities that made above average margin in a different font color to the others so that these cities will stand out from the rest in the table. In BusinessObjects, this kind of highlighting is called an alerter. To do this you need to:

- create a variable to calculate average margin
- set up an alerter

**First, you are going to calculate average margin.**

1. Click in the **Margin as % rev** column.
2. Click **Calculations** from the **Data** menu, then **Average**.

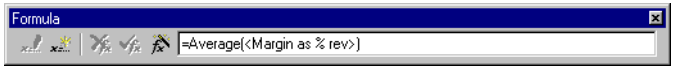
   Average margin displays in a new row at the bottom of the table:

| City | Sales revenue | Quantity sold | Margin | Margin per unit | Margin as % rev |
|---|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | $61 | 37.41 % |
| Boston | $887,169 | 5,269 | $336,574 | $64 | 37.94 % |
| Chicago | $1,134,085 | 6,519 | $439,865 | $67 | 38.79 % |
| Colorado Springs | $843,584 | 5,116 | $309,966 | $61 | 36.74 % |
| Dallas | $803,421 | 4,932 | $286,146 | $58 | 35.62 % |
| Houston | $2,246,198 | 13,342 | $855,542 | $64 | 38.09 % |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | $63 | 37.39 % |
| Miami | $811,924 | 4,830 | $318,132 | $66 | 39.18 % |
| New York | $3,151,022 | 19,109 | $1,189,166 | $62 | 37.74 % |
| San Francisco | $1,336,003 | 7,900 | $502,121 | $64 | 37.58 % |
| Washington | $1,053,581 | 6,491 | $385,415 | $59 | 36.58 % |
| | | | | **Average:** | **37.55 %** |

**Next, you are going to turn the formula to calculate average margin into a variable.**

1. Right-click on any open toolbar and choose **Formula Bar** from the menu.

   The Formula Bar opens.

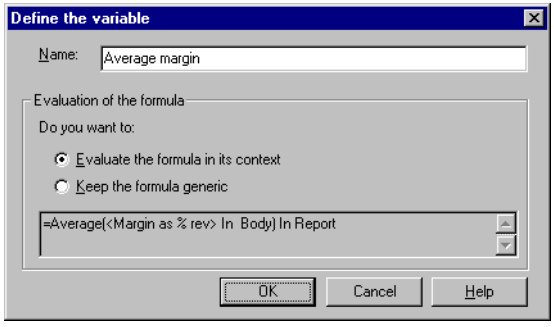



2. Click the cell that displays the Average margin.

   The formula BusinessObjects used to calculate the average margin appears in the Formula Bar.

Define As Variable

3. Click **Define As Variable** on the Formula Bar.
   The Define the variable dialog box opens.



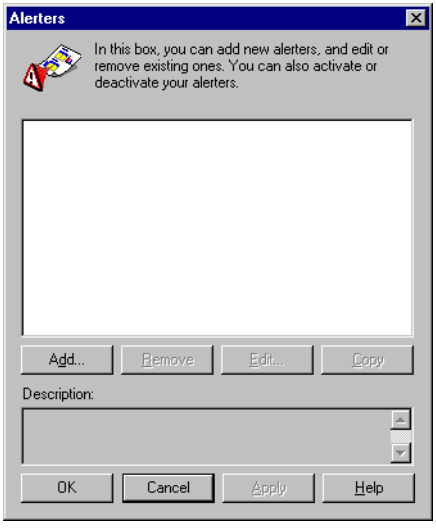

4. Type *Average margin* in the **Name** box.
5. Click **Evaluate the formula in its context**.
6. Click **OK**.
   The variable Average margin appears in the variables list in the Report Manager Data tab.

**You're now ready to set up the alerter. To do this:**

1. Click once in the **City** column.
2. Click the **Alerter** on the **Report** toolbar.

**Alerter**

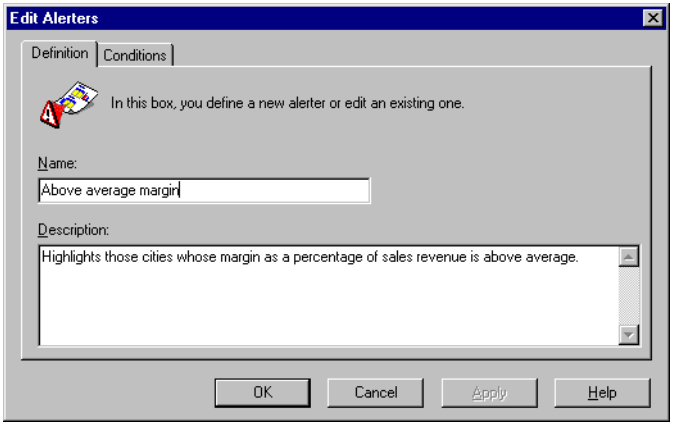
The Alerters dialog box opens.



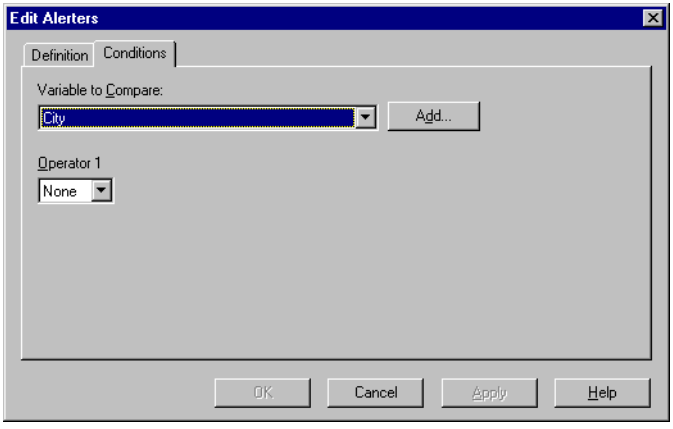

3. Click **Add**.

   The Edit Alerters dialog box opens.

4. Type *Above Average Margin* in the Name box and then type in a description of what the alerter does.

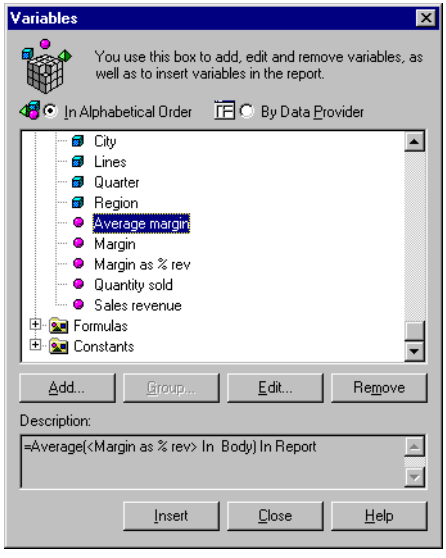


5. Click the **Conditions** tab.
   This is where you define how the alerter displays and when it displays.



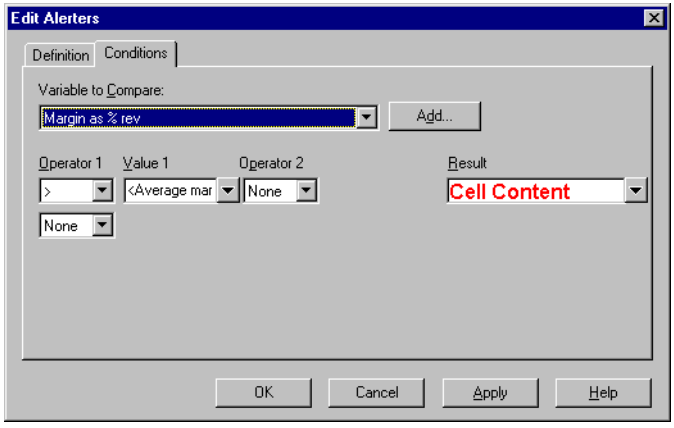

6. Click the drop-down arrow under **Variable to Compare** and select **Margin as % rev**.
7. From the **Operator 1** list box, choose **>** (greater than symbol).
   The Value 1 box appears.

8. Click the drop-down arrow next to the **Value 1** box and select **Variables**.
   The Variables dialog box opens.



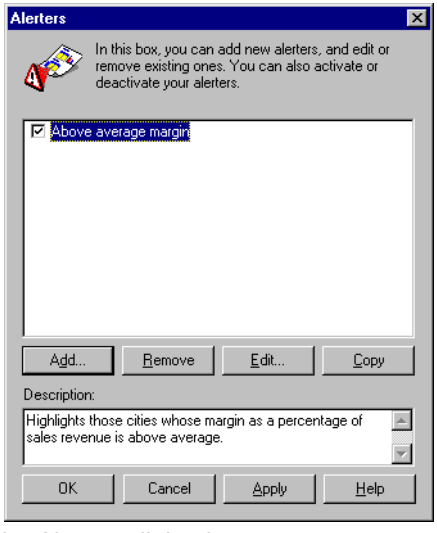

9. Click **Average margin** from the variables list and click **Insert**.
10. Click **None** under Variable 2.
11. Click the drop-down arrow under **Result** where Cell Content displays and select **Format**.
    The Cell Format dialog box opens.

12. Click the **Font** tab, and set the color to **red**, the font style to **bold** and click **OK**.
    The Conditions tab now appears as illustrated below:




13. Click **OK** to close the Edit Alerters dialog box.
    The alerter displays in the alerters list.

When the check box is selected, the alerter is active.




14. Click **OK** to close the Alerters dialog box.
    The names of those cities that produced above average margins this year now appear in bold, red type.

# The finished report

In your finished report, the cities that produced above average revenue clearly stand out from the rest:

**Margin per City**

| City | Sales revenue | Quantity sold | Margin | Margin per unit | Margin as % rev |
|---|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | $61 | 37.41 % |
| **Boston** | $887,169 | 5,269 | $336,574 | $64 | 37.94 % |
| **Chicago** | $1,134,085 | 6,519 | $439,865 | $67 | 38.79 % |
| Colorado Springs | $843,584 | 5,116 | $309,966 | $61 | 36.74 % |
| Dallas | $803,421 | 4,932 | $286,146 | $58 | 35.62 % |
| **Houston** | $2,246,198 | 13,342 | $855,542 | $64 | 38.09 % |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | $63 | 37.39 % |
| **Miami** | $811,924 | 4,830 | $318,132 | $66 | 39.18 % |
| **New York** | $3,151,022 | 19,109 | $1,189,166 | $62 | 37.74 % |
| **San Francisco** | $1,336,003 | 7,900 | $502,121 | $64 | 37.58 % |
| Washington | $1,053,581 | 6,491 | $385,415 | $59 | 36.58 % |
| | | | | **Average:** | **37.55 %** |

# How Has Sales Revenue Progressed From Quarter To Quarter?

lesson 4

# Overview

In this lesson:

- **Business question**

How has sales revenue progressed from quarter to quarter?

- **Learning objective**

Display and format financial data in a table; calculate quarterly variance and publish the report.

- **Time**

15 minutes

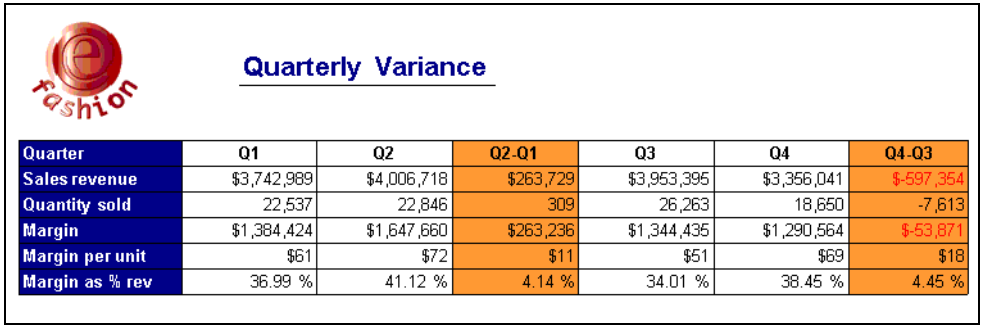
- **Finished report**

Efashion.rep, Quarterly Variance

# Objective

You want to see how your business has progressed from quarter to quarter over the past year. You are going to do this by building a report to compare the difference in certain indicators from quarter to quarter. These indicators include those you got from your database, such as sales revenue, and those you have set up yourself, such as margin as a percentage of sales revenue.

This lesson takes you through all the steps needed to build the following report:



**Quarterly Variance**

| Quarter | Q1 | Q2 | Q2-Q1 | Q3 | Q4 | Q4-Q3 |
|---|---|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $263,729 | $3,953,395 | $3,356,041 | $-597,354 |
| Quantity sold | 22,537 | 22,846 | 309 | 26,263 | 18,650 | -7,613 |
| Margin | $1,384,424 | $1,647,660 | $263,236 | $1,344,435 | $1,290,564 | $-53,871 |
| Margin per unit | $61 | $72 | $11 | $51 | $69 | $18 |
| Margin as % rev | 36.99 % | 41.12 % | 4.14 % | 34.01 % | 38.45 % | 4.45 % |

# Before you begin

You are again going to base this new report on the one created in the previous lesson so you need to copy and rename this report. You also need to turn the alerter off.

## Duplicate and rename

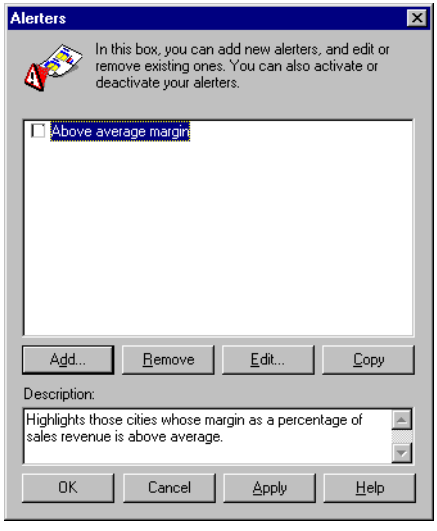
- Duplicate the report *Margin Analysis* and rename it as *Quarterly Variance*.

## Remove the alerter on city

You do not want to display the alerter you have set up in this report. When you turn an alerter off, it is not deleted, so you can always turn it on again if necessary. To turn the alerter off:

1. Click once in the **City** column.
2. Click **Alerter** on the **Report** toolbar.

   The Alerters dialog box opens.




3. Clear the check box next to Above average margin.
4. Click **OK**.

# Organize the data

In this report, you are interested in the differences between quarters and not in the differences between cities so you are going to replace city with quarter in your table. You also no longer want to display the footer row at the bottom of the table that displays the average.

To do this:

Delete

1. Select the footer row at the bottom of the table and click **Delete** on the **Standard** toolbar.

   The footer row containing Average disappears from the table.
2. Click the **Data** tab of the Report Manager.
3. Select **Quarter** in the list of variables.
4. Click again on **Quarter** and, holding down your left mouse button, drag the cursor over the City column.
5. When the City column highlights with a gray hatched border and the status bar displays the message *Drop to replace contents*, release the mouse.

| City | Sales revenue | Quantity sold | Margin | Margin per unit | Margin as % rev |
|---|---|---|---|---|---|
| Austin | $1,135,479 | 6,919 | $424,790 | $61 | 37.41 % |
| Boston | $887,169 | 5,269 | $336,574 | $64 | 37.94 % |
| Chicago | $1,134,085 | 6,519 | $439,865 | $67 | 38.79 % |
| Colorado Springs | $843,584 | 5,116 | $309,966 | $61 | 36.74 % |
| Dallas | $803,421 | 4,932 | $286,146 | $58 | 35.62 % |
| Houston | $2,246,198 | 13,342 | $855,542 | $64 | 38.09 % |
| Los Angeles | $1,656,676 | 9,869 | $619,368 | $63 | 37.39 % |
| Miami | $811,924 | 4,830 | $318,132 | $66 | 39.18 % |
| New York | $3,151,022 | 19,109 | $1,189,166 | $62 | 37.74 % |
| San Francisco | $1,336,003 | 7,900 | $502,121 | $64 | 37.58 % |
| Washington | $1,053,581 | 6,491 | $385,415 | $59 | 36.58 % |

*The Quarter column replaces the City column.*

## Change the table orientation

You can present the data in this table better by displaying the headings in the left column of the table. You can do this by rotating the table.

To do this:

1. Select the table.
2. Click **Rotate Table** on the **Report** toolbar.

**Rotate Table**

The table rotates and the headings display in the left column of the table

| Quarter | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,717 | $3,953,395 | $3,356,041 |
| Quantity sold | 22,537 | 22,846 | 26,263 | 18,650 |
| Margin | $1,384,424 | $1,647,660 | $1,344,435 | $1,290,564 |
| Margin per unit | $61 | $72 | $51 | $69 |
| Margin as % rev | 36.99 % | 41.12 % | 34.01 % | 38.45 % |

## Reorganize and format the table

Let's format the table to better present the data. First, align the cell contents in the header column to the left.

To do this:

1. Select the left column.

   This is the header column. It displays the names of the variables whose values are displayed in the rows.

Align Left

2. Click **Align Left** on the **Formatting** toolbar.

   The contents of the header column cells are aligned against the left edge of the cell.

Next, make the top row stand out better by centering the Quarter names and putting them in bold type.

To do this:

Align Center

1. Select the **Q1** cell.

   To select a cell, click inside it once.
2. Click **Align Center** on the **Formatting** toolbar.
3. Click **Bold** on the **Formatting** toolbar.

Bold

The quarter names now stand out better in the table. Notice that any changes you make to one of the Quarter cells are made to all values of that variable.

| Quarter | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,717 | $3,953,395 | $3,356,041 |
| Quantity sold | 22,537 | 22,846 | 26,263 | 18,650 |
| Margin | $1,384,424 | $1,647,660 | $1,344,435 | $1,290,564 |
| Margin per unit | $61 | $72 | $51 | $69 |
| Margin as % rev | 36.99 % | 41.12 % | 34.01 % | 38.45 % |

Let's verify the background color of the body cells.

To do this:

1. Select the **Q1** column.

   To select a column or row, hold your cursor over the top of it. When the cursor changes to a black arrow pointing down, click once.

Background Color

2. Click **Background Color** on the **Formatting** toolbar.

   The Color Palette opens.

3. Click **White** on the Color palette and click **OK**.

   All the Quarter columns appear in gray.

# Calculate the quarterly variance

You want to display the quarterly variance to see how your business has progressed from quarter to quarter. First, let's calculate the difference between the figures in Q2 and the figures in Q1.

To do this:

1. Click in the **Q2** cell.
2. Press **Ctrl** and click in the **Q1** cell.

| Quarter | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $3,953,395 | $3,356,041 |
| Quantity sold | 22,537 | 22,846 | 26,263 | 18,650 |
| Margin | $1,384,424 | $1,647,660 | $1,344,435 | $1,290,564 |
| Margin per unit | $61 | $72 | $51 | $69 |
| Margin as % rev | 36.99 % | 41.12 % | 34.01 % | 38.45 % |


Variance

3. Click **Variance** on the **Report** toolbar.

   The difference between each indicator for the two quarters display in a new cell added after the figures for Q2. This column title is Q2-Q1.

| Quarter | Q1 | Q2 | Q2-Q1 | Q3 | Q4 |
|---|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $263,729 | $3,953,395 | $3,356,041 |
| Quantity sold | 22,537 | 22,846 | 309 | 26,263 | 18,650 |
| Margin | $1,384,424 | $1,647,660 | $263,236 | $1,344,435 | $1,290,564 |
| Margin per unit | $61 | $72 | $11 | $51 | $69 |
| Margin as % rev | 36.99 % | 41.12 % | 4.14 % | 34.01 % | 38.45 % |

To calculate the difference in figures between Q3 and Q4:

1. Click in the **Q4** cell.
2. Press **Ctrl** and click in the **Q3** cell.
3. Click **Variance** on the **Report** toolbar.

   A new column of figures displays after the figures for Q4.

## Add shading to variance columns

To make the cells that show the quarterly variance stand out, let's shade them a different color.

Background color

To do this:

1. Select the **Q2-Q1** column.
2. Press **Ctrl** and select the **Q4-Q3** column.
3. Both the **Q2-Q1** and **Q4-Q3** highlight.
4. Click **Background Color** on the **Formatting** toolbar
5. Choose **Pale Orange** from the color palette and click **OK**.
   The variance columns stand out from the rest.

| Quarter | Q1 | Q2 | Q2-Q1 | Q3 | Q4 | Q4-Q3 |
|---|---|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $263,729 | $3,953,395 | $3,356,041 | $-597,354 |
| Quantity sold | 22,537 | 22,846 | 309 | 26,263 | 18,650 | -7,613 |
| Margin | $1,384,424 | $1,647,660 | $263,236 | $1,344,435 | $1,290,564 | $-53,871 |
| Margin per unit | $61 | $72 | $11 | $51 | $69 | $18 |
| Margin as % rev | 36.99 % | 41.12 % | 4.14 % | 34.01 % | 38.45 % | 4.45 % |

# Add the finishing touches

This report will be read by the whole company so you're going to add the company logo as well as give it a title.

## Give the report a title

Type in a new title, *Quarterly Variance*, in the title cell.

**Quarterly Variance**

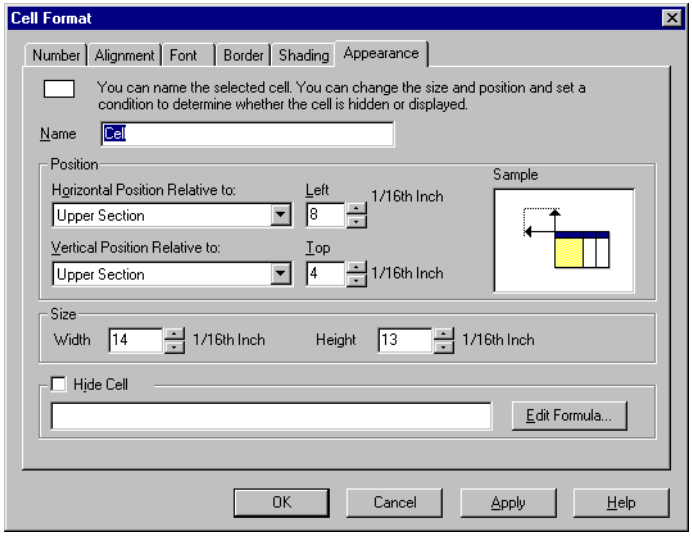
| Quarter | Q1 | Q2 | Q2-Q1 | Q3 | Q4 | Q4-Q3 |
|---|---|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $263,729 | $3,953,395 | $3,356,041 | $-597,354 |
| Quantity sold | 22,537 | 22,846 | 309 | 26,263 | 18,650 | -7,613 |
| Margin | $1,384,424 | $1,647,660 | $263,236 | $1,344,435 | $1,290,564 | $-53,871 |
| Margin per unit | $61 | $72 | $11 | $51 | $69 | $18 |
| Margin as % rev | 36.99 % | 41.12 % | 4.14 % | 34.01 % | 38.45 % | 4.45 % |

## Add the company logo

To finish off your report, you want to add the eFashion corporate logo. The logo is an image file and to add an image you first need to insert a cell to contain the image and then resize it.

To do this:

1. Insert a new cell in the top left-hand corner of the report and press Enter.
   If necessary, you may need to move the title over to the right to make room.
2. Right-click the cell, then click **Format Cell** from the menu.
   The Cell Format dialog box opens.
3. Click the **Appearance** tab.




4. Under the Size box, click the **Width** box and type 14, click the **Height** box and type 13, then click **OK**.
   The cell is now just the right size for the eFashion logo.

To insert the logo:

1. Select the cell.
2. From the **Insert** menu, click **Picture**.
   The Insert Picture cursor appears.

Insert Picture

3. Click the report, above the table.
   The Open dialog box appears.


4. Navigate to the UserDocs folder in the My BusinessObjects Documents under the My Documents folder.
5. Select **Efashion.bmp** and click **Open**.
   The eFashion logo displays in your report.

To remove the border from around the logo:

1. Select the cell containing the logo.
2. Click **No Borders** on the **Borders** toolbar.

# The finished report

Your final report looks like this:


**Quarterly Variance**

| Quarter | Q1 | Q2 | Q2-Q1 | Q3 | Q4 | Q4-Q3 |
|---|---|---|---|---|---|---|
| Sales revenue | $3,742,989 | $4,006,718 | $263,729 | $3,953,395 | $3,356,041 | $-597,354 |
| Quantity sold | 22,537 | 22,846 | 309 | 26,263 | 18,650 | -7,613 |
| Margin | $1,384,424 | $1,647,660 | $263,236 | $1,344,435 | $1,290,564 | $-53,871 |
| Margin per unit | $61 | $72 | $11 | $51 | $69 | $18 |
| Margin as % rev | 36.99 % | 41.12 % | 4.14 % | 34.01 % | 38.45 % | 4.45 % |

# Publish the report

The final step is to make the quarterly figures available to the sales and marketing departments throughout eFashion. To do this, you are going to publish the report to the BusinessObjects repository and specify which groups of users you want to publish the report for. The BusinessObjects repository is a centralized storage place which you can use to exchange documents with other BusinessObjects users at eFashion.

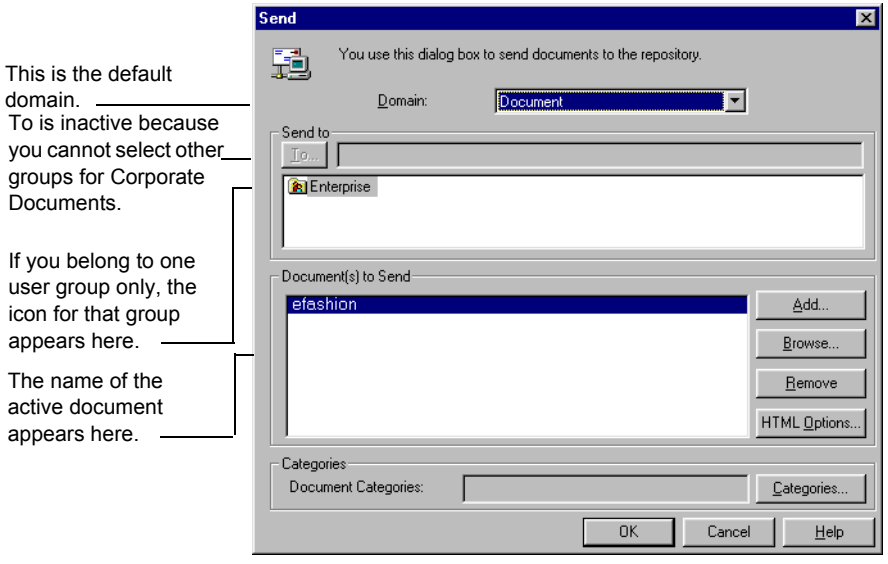
To do this:

1. Right click one of the docked toolbars and select **Document Exchange**.
2. Click **Publish to Corporate Documents** on the Document Exchange toolbar.

   The Send dialog box appears.

   The names of the groups to which you belong, the default document domain and the name of the active document are shown:

Publish to Corporate Documents

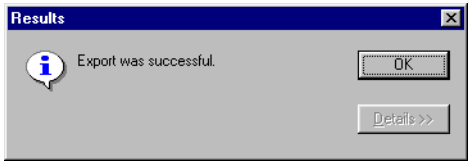


**NOTE**

What you see in this section of the tutorial depends on how BusinessObjects has been set up in your company. Your repository will not have the same groups, categories, and document domains as those illustrated in this tutorial.

3. Click **OK**.

   BusinessObjects displays a message box to show that you successfully published the documents on the repository:




For more information on sending and retrieving documents, see the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

# How Have Product Lines Performed?

lesson 5

# Overview

In this lesson:

- **Business question**

How have product lines performed over the last four quarters?

- **Learning objective**

Learn how to organize and view reports which contain a lot of data using breaks to display totals and subtotals; learn about calculation contexts; learn how to use a template to quickly format reports to corporate standards.

- **Time**

15 minutes

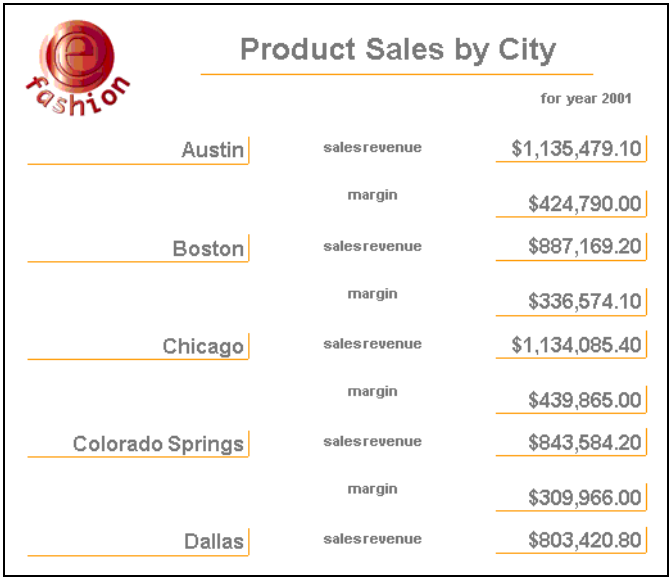
- **Finished report**

Efashion.rep, Product Analysis

# Objective

You now want to look at how your product lines have been performing in some detail. The report you are going to build contains a lot of data and you will see how you can organize and present reports containing a lot of data so that those reading your reports can go directly to the part that interests them.

This lesson takes you through all the steps needed to build the following report.




## Before you begin

Insert a new report after *Quarterly Variance* and rename the new report *Product Analysis*.

# Create a new report

This time, you're going to build a new report from scratch using the data already available in the document and then you're going to quickly format it by using a template.

## Add a table

After inserting a new report, add all the data you need in this report from the Report Manager Data tab.

1. In the Report Manager Data tab list, select **City**, **Lines**, **Quarter**, **Quantity sold**, **Margin** and **Sales revenue**.
2. Drag and drop all the selected variables into the report to create a table.
3. Organize the columns in your table in the following order: City, Quarter, Lines, Quantity sold, Margin, and Sales revenue.

| City | Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|---|
| Austin | Q1 | Accessories | 2,177 | $116,229 | $316,417 |
| Austin | Q1 | City Skirts | 7 | $773 | $1,715 |
| Austin | Q1 | City Trousers | 64 | $203 | $5,612 |
| Austin | Q1 | Dresses | 308 | $13,750 | $41,275 |
| Austin | Q1 | Jackets | 97 | $6,167 | $15,738 |
| Austin | Q1 | Leather | 17 | $808 | $2,746 |
| Austin | Q1 | Outerwear | 160 | $6,210 | $17,842 |

4. Double-click the report tab and type, Product Analysis in the Rename Report dialog box.
5. Click **OK**.

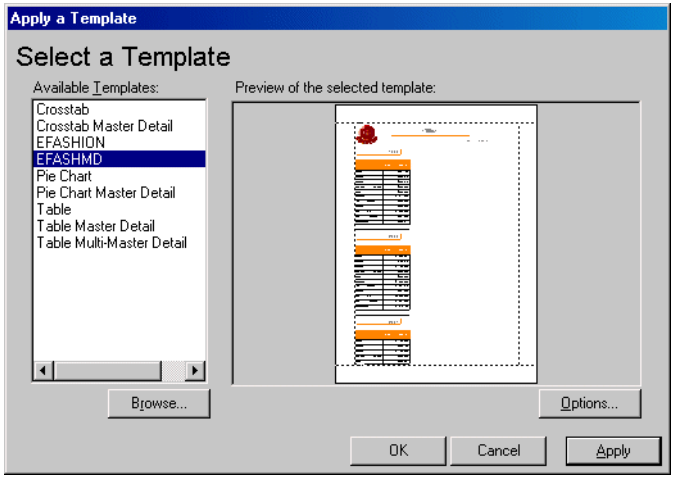
# Apply a template

So far you have the data you need displayed in a simple table. You're now going to organize and format this data by applying one of the eFashion corporate templates.

To do this:

1. Right-click on the report tab **Product Analysis** and select **Apply Template** from the menu.
2. The Apply a Template dialog box appears. This dialog box has a list of all the templates you have available in your templates folder.
3. Choose **EFASHMD** from the Available Templates box.

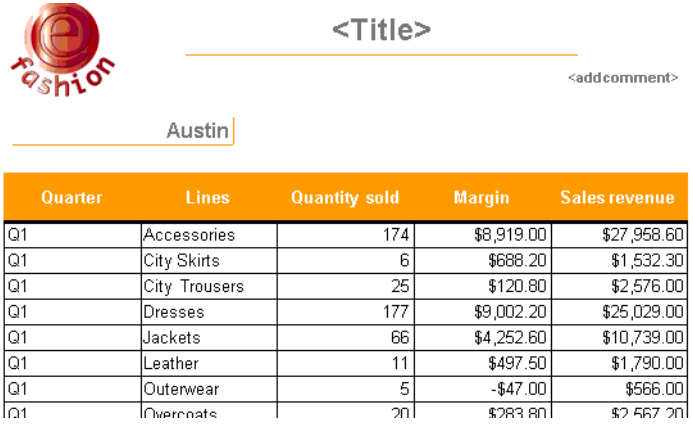
   A preview of the selected template displays.




4. Click **OK**.

   Your report reformats with the template style.

Your report is now organized in sections as a master/detail report with one section for each city. Your table and cells are formatted using corporate fonts and shading.




| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q1 | Accessories | 174 | $8,919.00 | $27,958.60 |
| Q1 | City Skirts | 6 | $688.20 | $1,532.30 |
| Q1 | City Trousers | 25 | $120.80 | $2,576.00 |
| Q1 | Dresses | 177 | $9,002.20 | $25,029.00 |
| Q1 | Jackets | 66 | $4,252.60 | $10,739.00 |
| Q1 | Leather | 11 | $497.50 | $1,790.00 |
| Q1 | Outerwear | 5 | -$47.00 | $566.00 |
| Q1 | Overcoats | 20 | $283.80 | $2,567.20 |

Your report also has the eFashion company logo and a formatted placeholder for a report title and for a comment. Let's fill these placeholders in right away.

1. Double-click **<Title>** and type *Product Sales by City*.
2. Double-click **<add comment>** and type in *for year 2003*.


**NOTE**

For information on how to set up a corporate template, see the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

# Break up the report data

You have already seen that one way of avoiding repetition in a table is by setting up a report with sections. Another way of organizing data is to break up data in a table or crosstab.

A break allows you to display all the data for each value of a dimension variable together, but more importantly it allows you to display subtotals for each break section.

To do this:

Insert break

1. Click the **Quarter** column.
2. Click **Insert Break** on the **Report** toolbar.

   The table splits up into four sections with one section for each quarter.

| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q1 | Accessories | 174 | $8,919.00 | $27,958.60 |
| | City Skirts | 6 | $688.20 | $1,532.30 |
| | City Trousers | 25 | $120.80 | $2,576.00 |
| | Dresses | 177 | $9,002.20 | $25,029.00 |
| | Jackets | 66 | $4,252.60 | $10,739.00 |
| | Leather | 11 | $497.50 | $1,790.00 |
| | Outerwear | 5 | -$47.00 | $566.00 |
| | Overcoats | 20 | $283.80 | $2,567.20 |
| | Shirt Waist | 211 | $13,608.50 | $37,394.70 |
| | Sweaters | 200 | $8,800.20 | $28,009.90 |
| | Sweat-T-Shirts | 967 | $70,142.60 | $171,019.50 |
| | Trousers | 29 | $1,603.80 | $5,247.60 |
| Q1 | | | | |
| | | | | |

| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q2 | Accessories | 293 | $20,397.30 | $47,435.40 |
| | City Skirts | 24 | $2,313.70 | $5,210.60 |
| | Dresses | 164 | $12,181.40 | $27,322.20 |
| | Jackets | 16 | $1,397.20 | $2,815.50 |
| | Shirt Waist | 163 | $9,209.70 | $28,323.60 |
| | Sweaters | 223 | $16,361.40 | $37,915.40 |
| | Sweat-T-Shirts | 648 | $48,490.40 | $117,436.60 |
| | Trousers | 34 | $3,174.60 | $7,148.50 |
| Q2 | | | | |

3. Click the **Quarter** column.
4. Click **Center Value Across Break** on the **Formatting** toolbar.

Center Value Across Break

The quarter cells merge into one and each quarter value displays only once.

| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q1 | Accessories | 174 | $8,919.00 | $27,958.60 |
| | City Skirts | 6 | $688.20 | $1,532.30 |
| | City Trousers | 25 | $120.80 | $2,576.00 |
| | Dresses | 177 | $9,002.20 | $25,029.00 |
| | Jackets | 66 | $4,252.60 | $10,739.00 |
| | Leather | 11 | $497.50 | $1,790.00 |
| | Outerwear | 5 | -$47.00 | $566.00 |
| | Overcoats | 20 | $283.80 | $2,567.20 |
| | Shirt Waist | 211 | $13,608.50 | $37,394.70 |
| | Sweaters | 200 | $8,800.20 | $28,009.90 |
| | Sweat-T-Shirts | 967 | $70,142.60 | $171,019.50 |
| | Trousers | 29 | $1,603.80 | $5,247.60 |
| Q1 | | | | |

# Make calculations

As you learned earlier, breaking up data in a table allows you to display subtotals as well as a grand total. You're going to add totals for three columns of data. You have to add the totals for each column of data separately.

To do this:

1. Click the **Margin** column.
2. Click **Sum** on the **Report** toolbar.
3. Click the **Sales revenue** column.
4. Click **Sum** on the **Report** toolbar.
5. Click the **Quantity sold** column.
6. Click **Sum** on the **Report** toolbar.

**Sum**

| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q3 | Accessories | 420 | $19,384.60 | $57,392.80 |
| | City Skirts | 64 | $2,538.30 | $9,908.00 |
| | City Trousers | 13 | $510.70 | $1,919.60 |
| | Dresses | 346 | $17,850.20 | $48,246.90 |
| | Jackets | 40 | $2,871.00 | $6,429.60 |
| | Leather | 7 | $383.00 | $1,252.70 |
| | Outerwear | 2 | -$7.10 | $237.90 |
| | Overcoats | 9 | $334.70 | $1,368.40 |
| | Shirt Waist | 162 | $7,290.70 | $26,090.80 |
| | Sweaters | 376 | $13,085.10 | $46,751.70 |
| | Sweat-T-Shirts | 559 | $32,715.00 | $90,900.70 |
| | Trousers | 25 | $1,406.90 | $4,299.50 |
| Q3 | Sum: | 2,023 | $98,363.10 | $294,797.60 |

| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q4 | Accessories | 215 | $11,298.20 | $32,913.70 |
| | City Skirts | 2 | $1.00 | $216.80 |
| | City Trousers | 10 | -$36.90 | $1,051.20 |
| | Dresses | 104 | $6,648.70 | $17,313.50 |
| | Jackets | 39 | $2,645.40 | $6,600.50 |
| | Leather | 4 | $161.70 | $707.40 |
| | Outerwear | 3 | -$110.40 | $304.40 |
| | Overcoats | 8 | $130.30 | $998.70 |
| | Shirt Waist | 154 | $9,525.40 | $29,372.30 |
| | Sweaters | 258 | $12,096.90 | $37,390.70 |
| | Sweat-T-Shirts | 625 | $51,042.60 | $121,765.70 |
| | Trousers | 18 | $1,626.10 | $4,009.00 |
| Q4 | Sum: | 1,440 | $95,029.00 | $252,643.90 |
| | Sum: | 6,919 | $424,790.00 | $1,135,479.10 |

**NOTE**

Notice that for each break section in the table, a subtotal displays a new row and a grand total displays at the bottom of the table. This allows you to have a total for each quarter and a total for the year for each city in the report.

# Add section headings

You are now going to add some summary information at the top of each section so that those reading your report can get a high level view for each city and then look at the details if necessary. You are going to add the sales revenue totals for each city next to each city name. You can do this in one easy move. But first, let's add a caption for the sales revenue total.

## Add a caption

To add a caption, you need to insert a cell to contain the text. An easy way to add a cell is to copy one that already exists in the report. The advantage of doing this here is to correctly format the caption cell so you do not spend time formatting it from scratch.

To do this:

1. Select the *for year 2003* cell.
2. Click the cell again and hold while you drag the cursor and position it next to the **Austin** master cell and then press **Ctrl**.

Copy cursor

3. When the cursor changes to the Copy cursor and the status bar reads *Drop to copy contents*, release the mouse.

   The cell and contents copy to the new position.

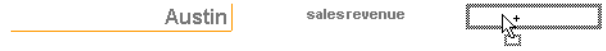

4. Double-click the cell and type *sales revenue*.

## Add section totals

Now let's add the sales revenue total next to the sales revenue caption.

To do this:

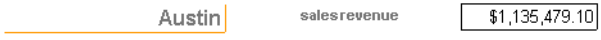
1. Click in the **Sales revenue** column.
2. Click the Sales revenue column again and hold, then drag the cursor out of the table and position it next to the *sales revenue* cell and hold down Ctrl.




| Quarter | Lines | Quantity sold | Margin | Sales revenue |
|---|---|---|---|---|
| Q1 | Accessories | 174 | $8,919.00 | $27,958.60 |
| | City Skirts | 6 | $688.20 | $1,532.30 |
| | City Trousers | 25 | $120.80 | $2,576.00 |
| | Dresses | 177 | $9,002.20 | $25,029.00 |
| | Jackets | 66 | $4,252.60 | $10,739.00 |
| | Leather | 11 | $497.50 | $1,790.00 |
| | Outerwear | 5 | -$47.00 | $566.00 |
| | Overcoats | 20 | $283.80 | $2,567.20 |
| | Shirt Waist | 211 | $13,608.50 | $37,394.70 |
| | Sweaters | 200 | $8,800.20 | $28,009.90 |
| | Sweat-T-Shirts | 967 | $70,142.60 | $171,019.50 |
| | Trousers | 29 | $1,603.80 | $5,247.60 |
| **Q1** | **Sum:** | **1,891** | **$117,872.20** | **$314,429.80** |

Copy cursor

3. When the cursor changes to the Copy cursor and the status bar reads *Drop to copy contents*, release the mouse.
   The total sales revenue for the city displays in a new cell.




The cells containing the comment and the sales revenue total have been copied to all the city sections in the report. BusinessObjects has calculated the section totals automatically.

### Calculation contexts

A powerful feature of BusinessObjects is that you can re-use the same calculation in different parts of the report. BusinessObjects re-calculates according to the context in which you place the calculation: a grand total at the top of the report, section totals for each section. You can also define the calculation context using specific syntax which tells BusinessObjects which dimension objects you want to exclude or include in the calculation. For more information on calculation contexts, see the *BusinessObjects User's Guide*.

## Format section totals

The new cell is not formatted in the same way as the other cells in the report but you can quickly fix this.

1. Right-click on the **City** master cell and choose **Copy** from the menu.
2. Select the **sales revenue** total cell.
3. Click **Paste Format** on the **Standard** toolbar.

   The formatting copies to the sales revenue total cell.

**Paste Format**

| | | |
|---|---|---|
| Austin | salesrevenue | $1,135,479.10 |

4. Now add a section total for margin following the same steps you followed to add a section total for sales revenue.

**NOTE**

You may need to move the table down slightly to make room for the section totals.

| | | |
|---|---|---|
| Austin | salesrevenue | $1,135,479.10 |
| | margin | $424,790.00 |

## Align section headings

To give the report a really polished look, you can align report elements. Here, you are going to align the right edges of the cells containing the section totals:

To do this:

1. Right-click on any open toolbar and select **Alignment** from the menu.
   The Alignment toolbar displays.


2. Resize the cells containing the section totals to the width of the cell contents.
3. Click the cell containing the sales revenue section total.
   All the cells you now select will be aligned with this one.
4. Press **Ctrl** and click the cell containing the margin section total.
5. Click **Align Right** on the **Alignment** toolbar.
   The cells align along the right edges.

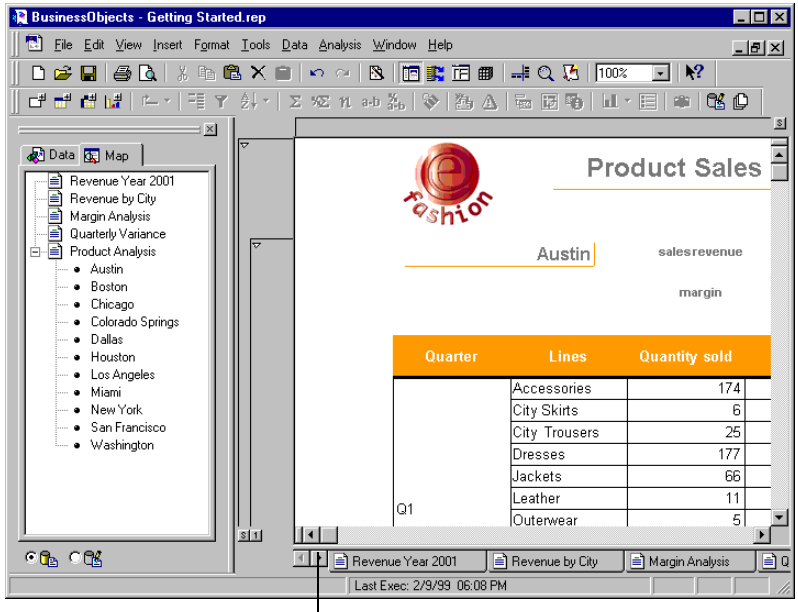
# Show in outline view

There's a lot of information in this report. A convenient way of displaying a report in sections like this is to use outline view. Outline view folds up the sections in the report to display only the high level information that you've included at the top of each section. People viewing your reports can then open up the sections they are interested in to get more details.

To turn on outline view:

1. From the **View** menu, click **Outline**.

   At the side of the report window, a bar with arrows displays.
2. Click **1** at the bottom of the bar.

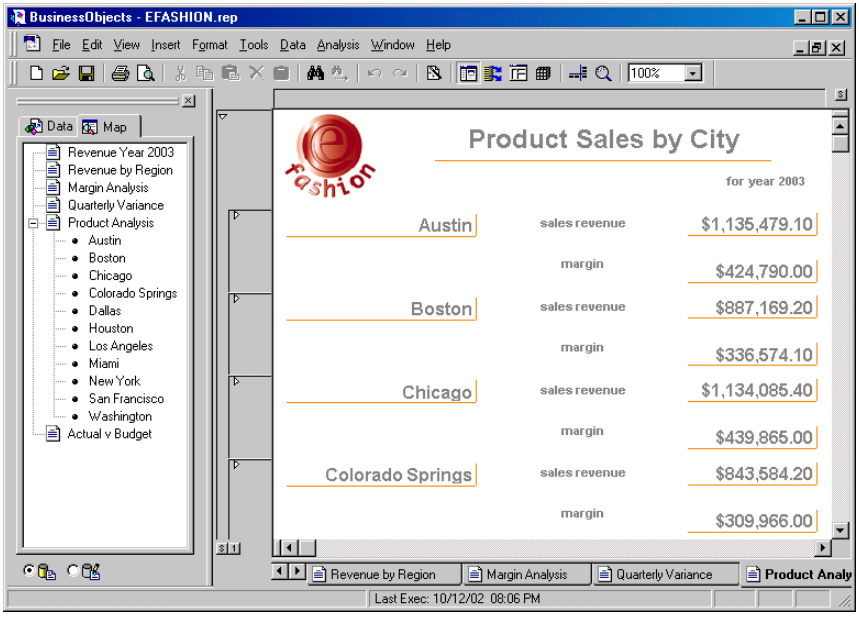



Click here to fold or unfold all sections.

The sections fold to display only the section title, the name of the city, and the section totals.

# The finished report

The final report looks like this:




To view a report in outline view:

1. Click the **Map** tab in the Report Manager.

   This gives you a list of the cities in the report.
2. Click **Miami** in the Map list box.

   The high level information for Miami displays in the Report window.
3. Click the arrow next to Miami in the Outline bar.

   The Miami section unfolds and you can view the details for the product lines for the four quarters of the year for Miami.

# How Do Budget Sales Figures Compare With The Actual Figures?

lesson 6

# Overview

In this lesson:

- **Business question**

How do the budget sales figures compare with the actual sales figures?

- **Learning objective**

Learn how to bring data from a personal data file into BusinessObjects and combine it with data from a BusinessObjects Universe query; create and format a chart to compare data.

- **Time**

15 minutes

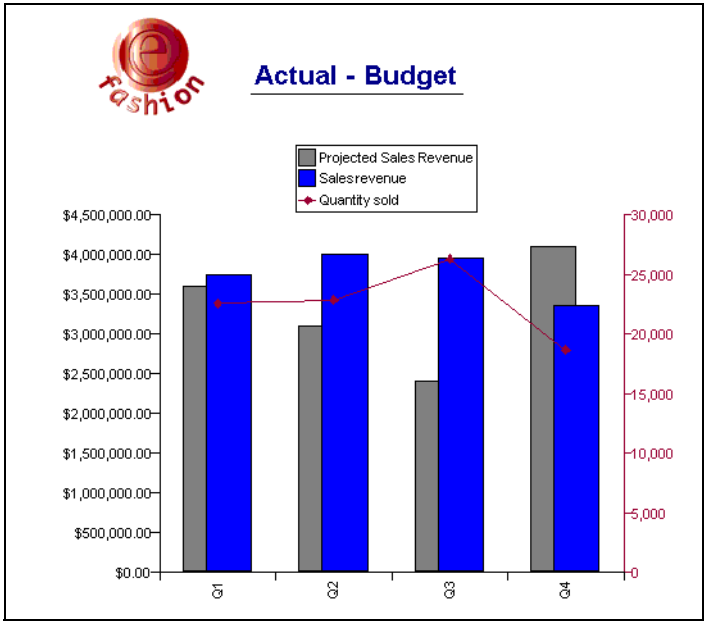
- **Finished report**

Efashion.rep, Actual - Budget

# Objective

You want to compare the actual sales figures for this year with the figures you forecast at the beginning of the year. You already have the actual sales revenue figures from the corporate database in your BusinessObjects document. Your sales forecast figures are in a personal spreadsheet file that you have on your computer. You can bring this data into BusinessObjects and then link the data from the database and the spreadsheet so that you can build a report to make your comparison.

This lesson takes you through all the steps needed to build the following report:



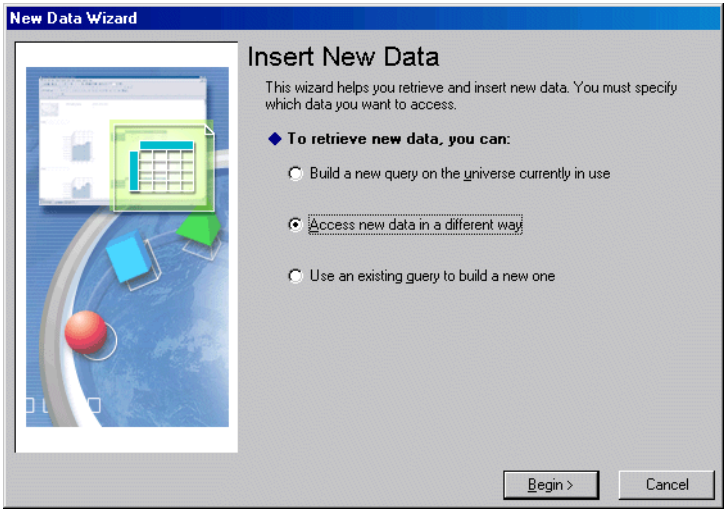
# Get data from a personal data file

You want to bring data from a personal spreadsheet file into your BusinessObjects report to compare the budget figures with the actual sales results.

To do this:

1. Right-click on any variable in the list in the **Data** tab of the Report Manager and choose **New Data Provider** from the menu.

   The New Data Wizard opens.



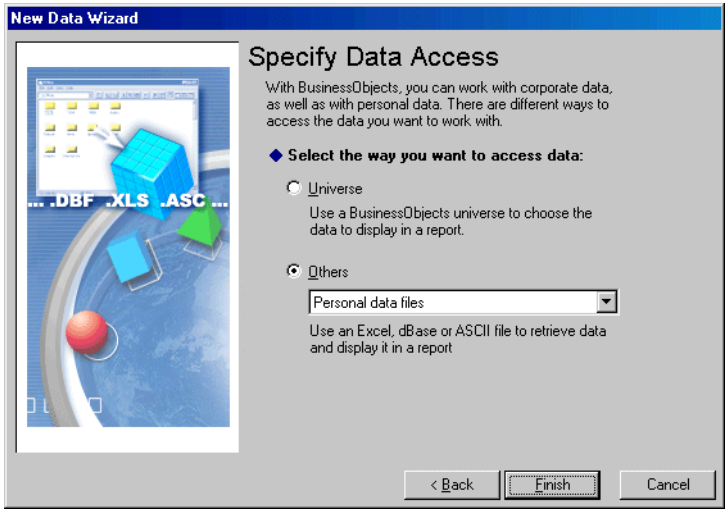

2. Choose *Access new data in a different way* and click **Begin**.

**NOTE**

For more information on the third choice, *Use an existing query to build a new one*, see *BusinessObjects User's Guide: Accessing Data and Data Analysis*.

3. On the next screen, Specify Data Access, click **Others**, then **Personal data files** from the list box and click **Finish**

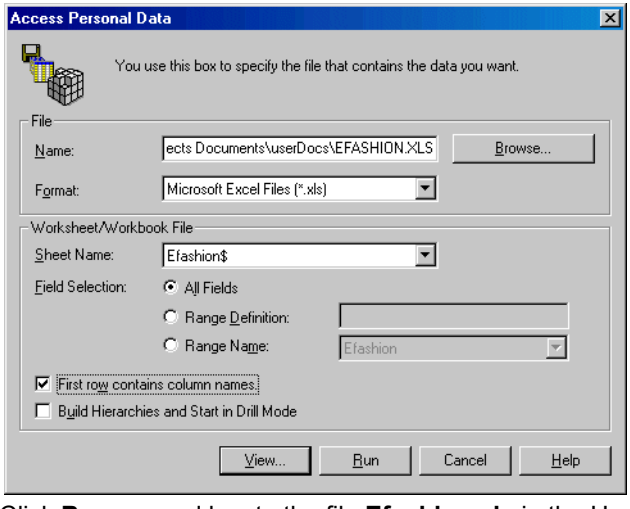
.




The Access Personal Data dialog box displays. This is where you set how you are going to bring the data into the BusinessObjects document.

Your personal data file is a Microsoft Excel spreadsheet.

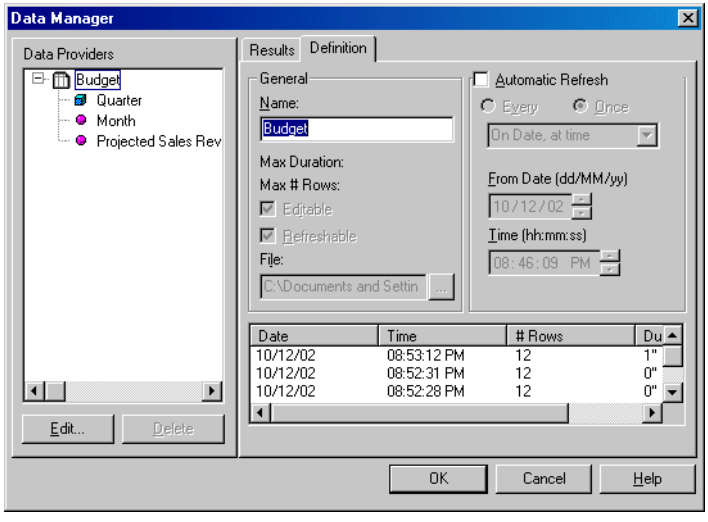
1. Click the Format drop-down arrow and select Microsoft Excel Files (.xls).




2. Click **Browse** and locate the file **Efashion.xls** in the UserDocs folder in the My BusinessObjects Documents folder.

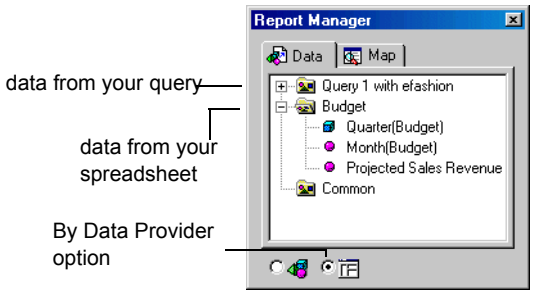
3. Click the *First row contains column names* option.
4. Click **View**.

   The Data Manager dialog box appears.




5. Click the **Definition** tab.
6. In the General box, type the name for the data provider, **Budget**.
7. Click **OK**.

   The new data displays in the Report Manager window.



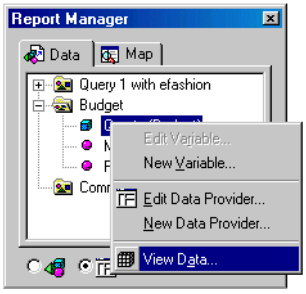

You now have data from two different data providers in your BusinessObjects document. To see which data comes from which data provider, click the *By Data Provider* on the Report Manager Data tab.

## Change the object qualification from measure to dimension

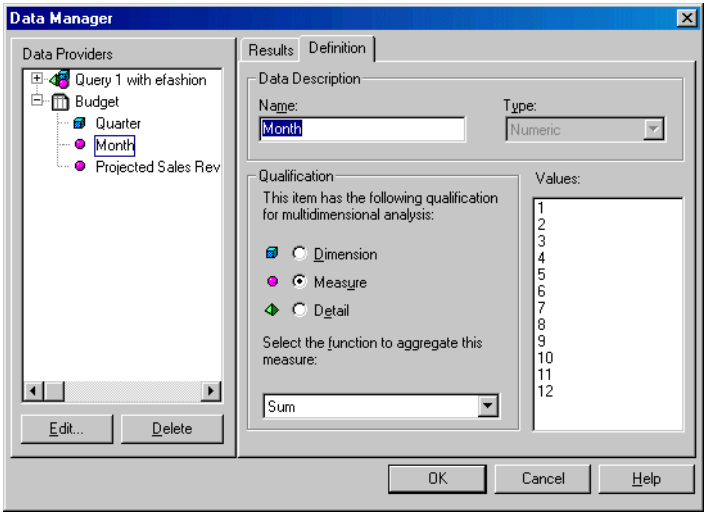
The month variable in Budget is interpreted as a measure when you import the Excel data. Since you won't be performing calculations on it, you can change the variable to a dimension object. The month variable from your query is already a dimension so the month variable in budget should be the same.

To do this:

1. Right click on any variable in the Report Manager and select **View Data**.




2. Click the **Definition** tab in the Data Manager dialog box.
3. Click to expand Budget in the Data Providers pane, then click **Month** so that Month appears in the Name text box under Data Description.




4. Click **Dimension** button and click **OK**.

   The Month variable icon changes to a Dimension object.

# Link data from different sources

The next step is to link the data from the two data providers so that you can display data from both of them in the same table or chart, for example.

To do this:

1. From the **Data** menu, click **View Data**.

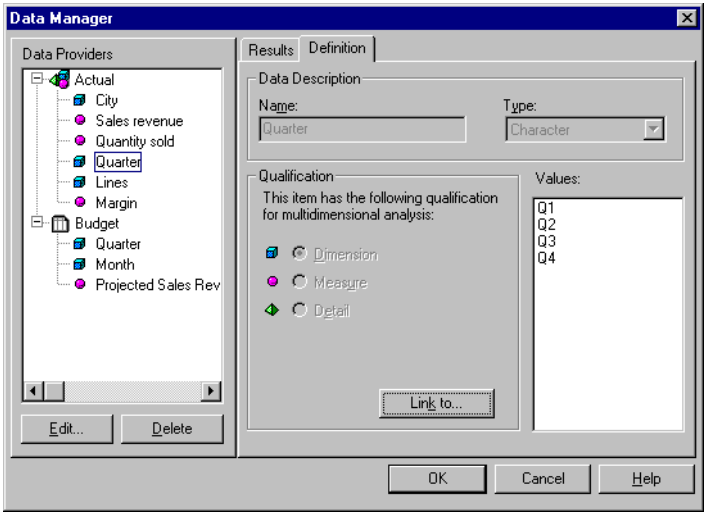
   The Data Manager displays.
2. Click the **Definition** tab.

   You gave the spreadsheet data provider a meaningful name so let's do the same for the universe data provider. To do this:
3. Click **Query 1 on eFashion**.
4. Click the **Definition** tab.
5. In the General section, type a name for the data provider, **Actual**.

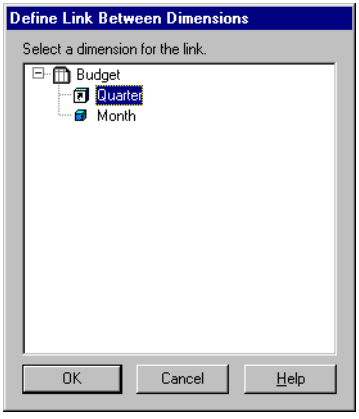
To link these two data providers together:

1. Click the plus signs (+) for Actual and Budget to open up the data provider lists.

   A list of variables from each data source, displays.



2. Click **Quarter** in the Actual list and click **Link to** in the Qualification box. The Define Link Between Dimensions dialog box opens.




3. Click **Quarter** in the list and click **OK**.
4. Click **OK** again to close the Data Manager.

You're now ready to build your report with actual and budget data.

# Display data in a chart

You want to display your data in a chart. First, you need to insert a new, blank report.

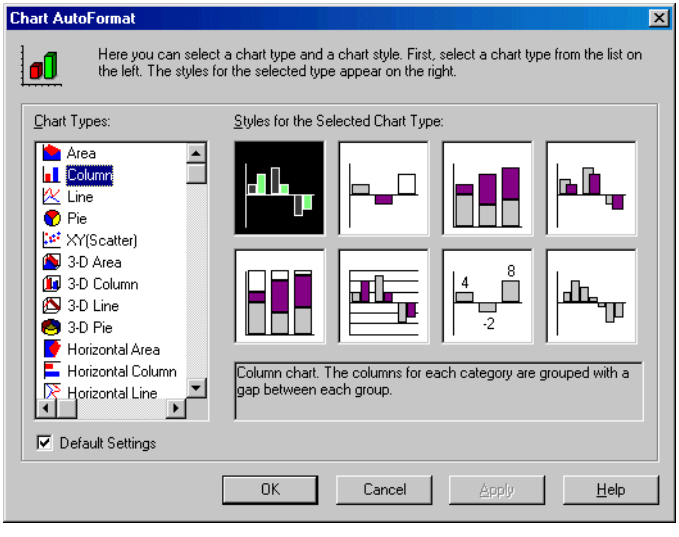
1. Click **Report** from the **Insert** menu after *Product Analysis.*
2. Click the report tab and rename it *Actual - Budget*.
3. In the Report Manager Data tab, select **Quarter(Actual)**, **Sales Revenue**, **Projected Sales Revenue** and **Quantity sold** and drag into the Report window to create a table.

   Notice that Quarter appears twice in the list of variables in the Report Manager, one from Actual and one from Budget. It doesn't actually matter which one you choose.

| Quarter(Actual) | Projected Sales | Quantity sold | Sales revenue |
|---|---|---|---|
| Q1 | 3,600,000 | 22,537 | $3,742,989 |
| Q2 | 3,100,000 | 22,846 | $4,006,717 |
| Q3 | 2,400,000 | 26,263 | $3,953,395 |
| Q4 | 4,100,000 | 18,650 | $3,356,041 |

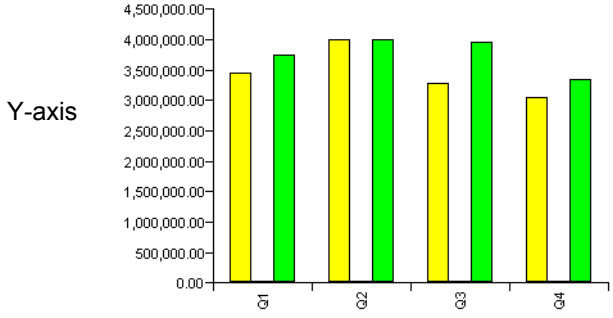
4. Right-click on the table and choose **Turn To Chart** from the menu.

   The Chart AutoFormat dialog box displays.



5. Choose **Column** from the **Chart Types** list and choose the first option in the Styles for the Selected Chart Type section.
6. Click **OK**.

   The data displays in a column chart.




A column chart has two axes. Measure objects, such as Sales revenue, are displayed on the Y-axis and dimension objects, such as Quarter, are displayed on the X-axis.

# Organize the chart data

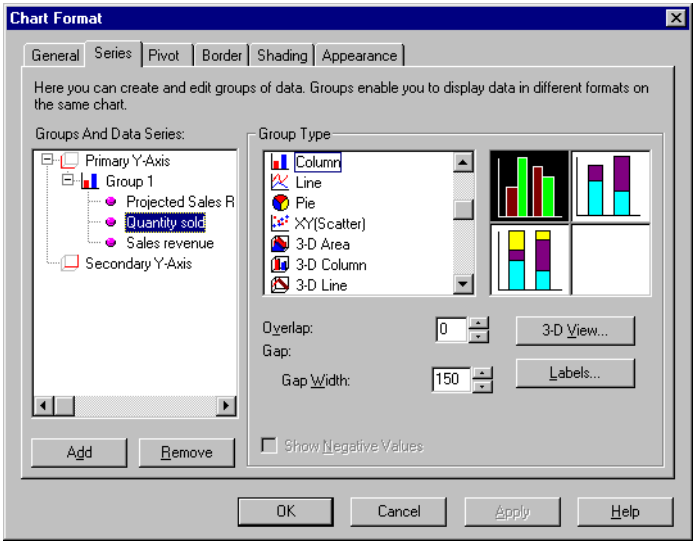
The chart has a different color column for each of the three measures: Projected Sales Revenue, Quantity sold, and Sales revenue. However, revenue and quantity are not calculated in the same way. Sales revenue calculates in dollars and quantity sold in units. The Y-axis on the chart represents dollars so you can't even see the quantity sold column on the chart.

You can improve this chart in two ways:

- by using different chart types for quantity sold and for revenue
- by displaying data on two Y-axes, one axis with values in dollars and the other with number of units.

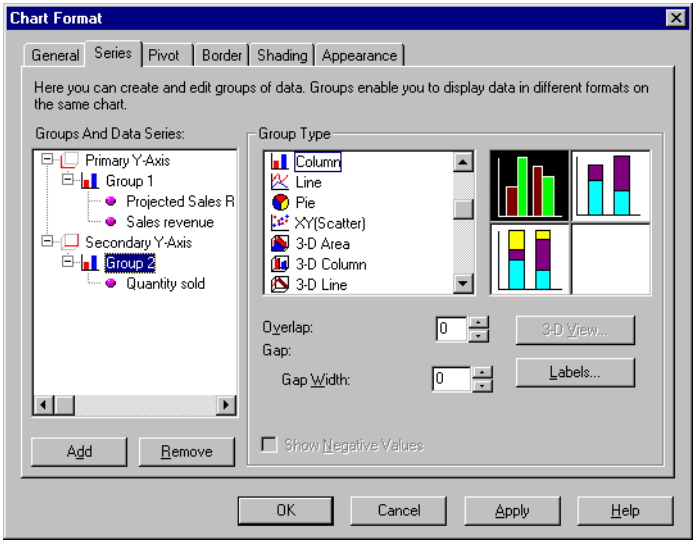
To do this:

1. Right-click on the chart and select **Format Chart** from the menu.
   The Chart Format dialog box displays.

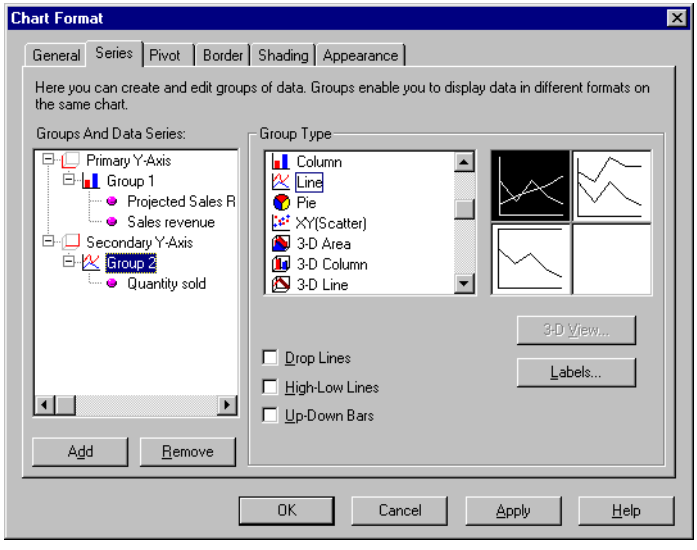



2. Click the **Series** tab.
3. Click the plus sign to open Group 1 and drag **Quantity sold** to the Secondary Y-axis folder.

A new group, Group 2, appears on the secondary axis.




4. Select **Group 2** and click **Line** from the Group Type list.l



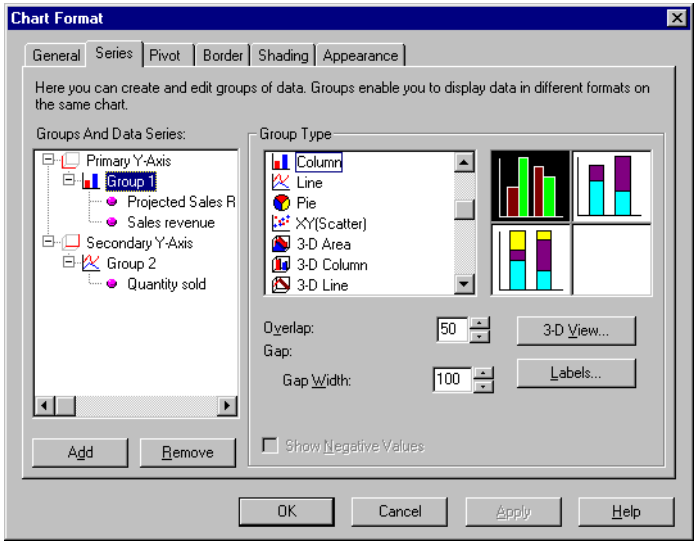

*Notice that the icon next to the Group 2 is a line chart icon.*

5. Click the **Group 1** icon.

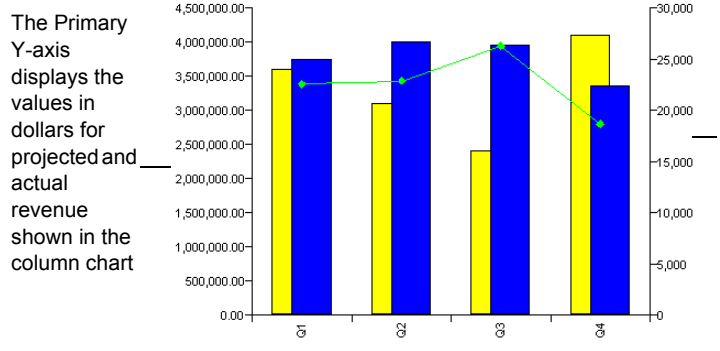
   Notice that this icon is a column chart icon.

   You can specify how you want your columns to be arranged by setting how much space you want between the sets per Quarter and whether you want the columns in each set to overlap.

6. Enter **50** in the Overlap text box and **100** in the Gap Width text box.




7. Click **OK** to close the dialog box and view the result.




*Your chart now has a secondary Y-axis. Quantity sold displays as a line chart so you can clearly see the figures for each quarter.*

# Format the chart

Now let's work on the presentation of the chart by adding a legend and changing the colors of the columns and lines.

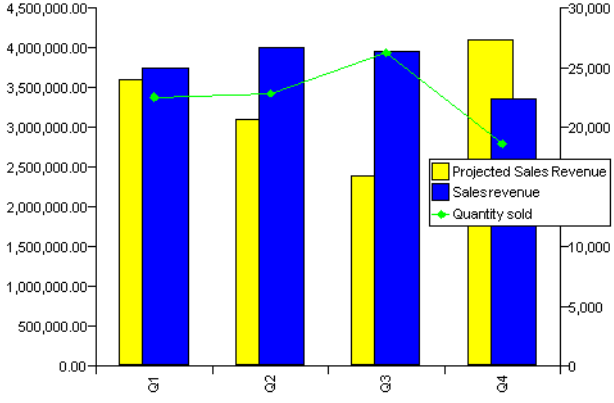
## Add a chart legend

A chart legend is essential here to explain what the different columns and lines on the chart represent.

To add a chart legend:

Show/Hide Legend

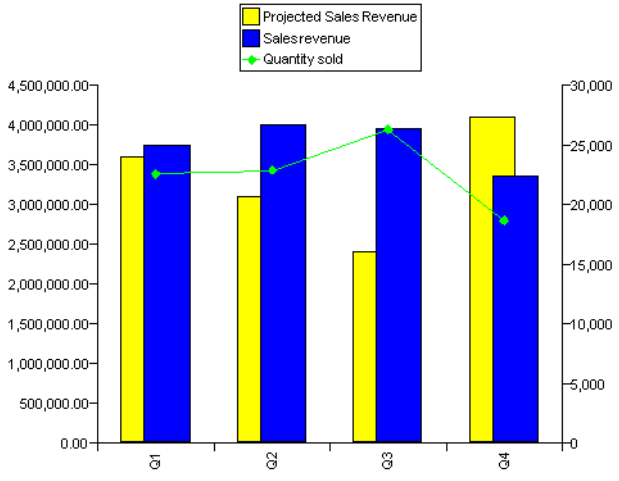
- Click **Show/Hide Legend** on the **Report** toolbar.




*The overlapping columns clearly show where the actual sales figures went over or under the forecast figures.*

The chart legend would be better positioned at the top of the chart. To move the legend:

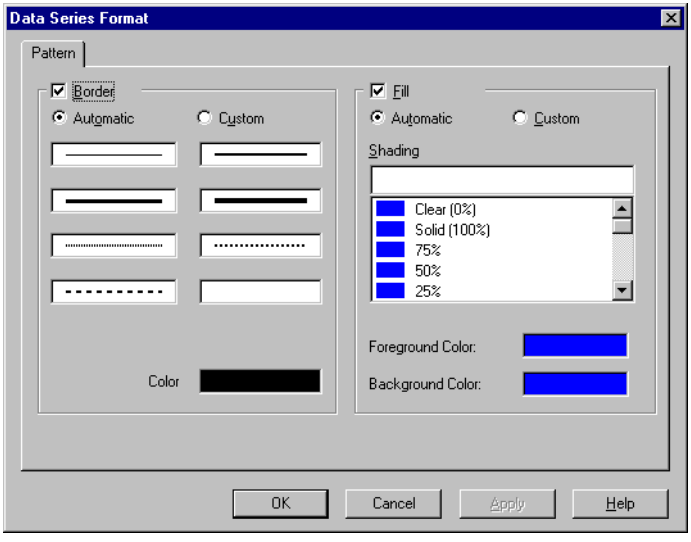
1. Click the outer border of the chart legend.
   A hatched, gray border appears around the chart legend.
2. Drag the chart legend and position it above the chart.



## Change the column color

You can change the colors of the column borders and the fill. To do this:

1. Double-click on the **Sales Revenue** column.
   The Data Series Format dialog box displays.




2. Under Fill, click on the **Foreground Color** color box.
3. Select a color, gray for example, from the Color dialog box and click **OK**.
4. Repeat the above step for **Background Color**.
5. Click **OK** to close the dialog box.

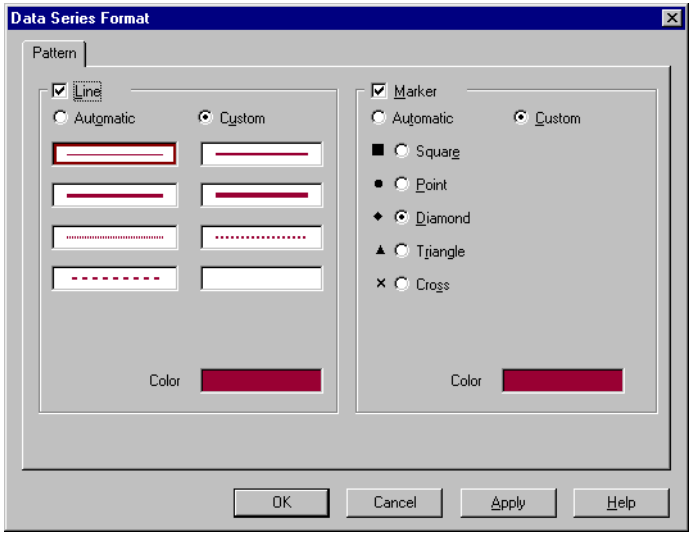
If you wish, change the color of the **Projected Sales Revenue** column.

## Change the line color

Now let's change the color of the line chart that displays the data for Quantity sold.

1. Double-click on the line chart.
   The Data Series Format dialog box displays. For a line chart, you can change the color and width of the line and the color and shape of the data point markers.

2. Under Line, click the **Color** box.



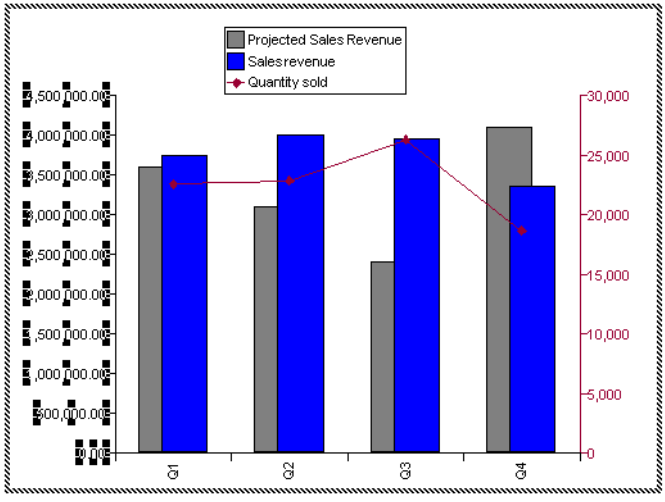

3. Select a color from the Color dialog box, dark red, for example, and click **OK**.
4. Click **OK** to close the dialog box and view the result.

## Format the chart axes

You can also format the chart axes. Here, you are going to format the sales revenue as currency and change the color of the secondary Y-axis to the same color as the line chart that displays the data for Quantity sold. This will make it clearer to those reading your chart that the figures for Quantity sold should be read against the right axis and the sales revenue against the left axis.

To format the currency:

1. Click on the data labels on the primary Y-axis on the left of the chart.
   The data labels are selected as shown below:




Currency Style

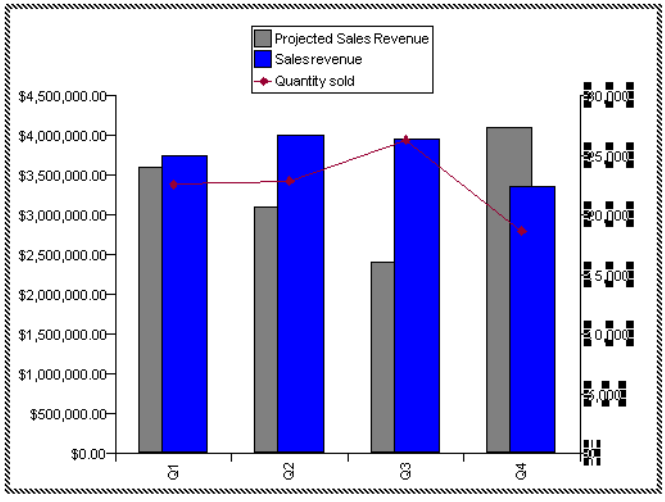
2. Click **Currency Style** on the **Formatting** toolbar.
   The sales revenue figures use the default currency style. If your default currency style is dollars, the dollar symbol appears in front of each figure.

**NOTE**

BusinessObjects uses the default currency set in the Windows Control Panel Regional Settings.

To format the axis:

1. Double-click on the secondary Y-axis on the right of the chart.
   The Format Axis Label dialog box displays.




2. Click the **Pattern** tab.
3. Under Line, select the same color you used for the line chart, dark red in our example.
4. Click the **Font** tab.
5. Set the font color to the same color, again, dark red in our example.
6. Click **OK** to close the dialog box and view the results.

# The finishing touches

To finish off the report, you are going to add the corporate logo and, of course, give it a nicely formatted title. A quick way of adding these to this report is to copy them from one of the other reports in the same document and paste them into this report.

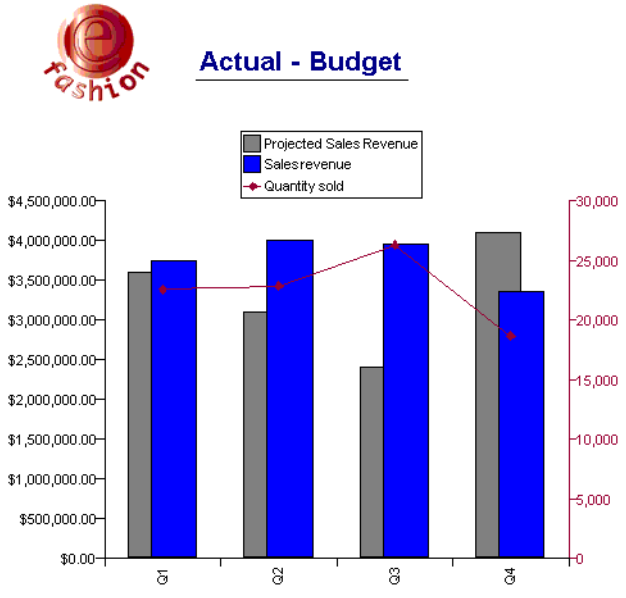
To do this:

1. Click on the *Quarterly Variance* report.
2. Right-click the eFashion logo and choose **Copy** from the menu.
3. Click the *Actual-Budget* report.
4. Right-click the top left-hand corner of the report and select **Paste** from the menu.

   The eFashion logo pastes into the *Actual-Budget* report.
5. Now copy the title from the *Quarterly Variance* report into the *Actual-Budget* report in the same way and change the title to “Actual - Budget”.

# The finished report

Your finished report looks like this:



# What Factors Impact Sales Revenue Performance?

lesson 7

# Overview

In this lesson:

- **Business question**

What factors impact sales revenue performance?

- **Learning objective**

Learn how to use BusinessObjects drill mode to analyze your business data.

- **Time**

15 minutes

- **Finished report**

Revenue.rep, sales analysis

**NOTE**

To perform this lesson and drill down to the database level, you must have installed the BusinessObjects product and Access Pack for the MS Access ODBC middleware.

# Objective

You saw earlier in this tutorial how BusinessObjects allows you to get a different viewpoint of your business by swapping the position of data in a report.

In this lesson, you'll see how BusinessObjects drill mode allows you to break down data and view it on different levels of detail to discover what is the driving factor behind a good or bad result.

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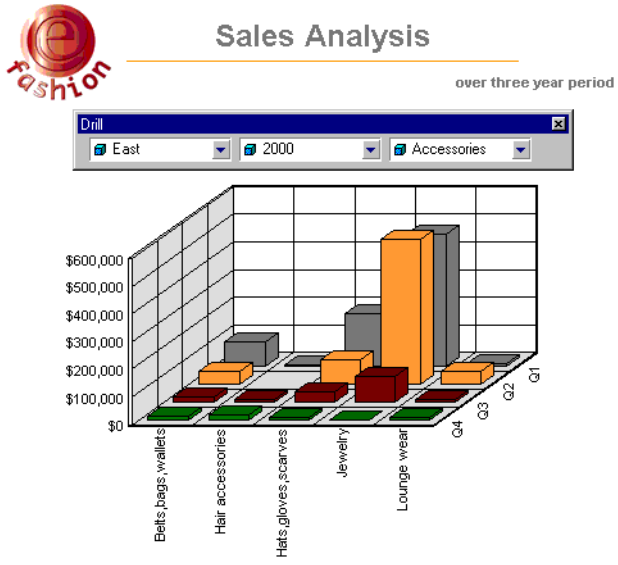



## What is drill mode?

If you displayed all the factors that could be useful for analysis in a table or chart, it could be difficult to read. Drill mode allows you to include data for analysis behind the scenes of your report and display only the top level data. You can then go down one level at a time and display more detailed information.

Typically, you start off your analysis by looking at the high-level data and when you spot an unusually low or high value, or an unexpected value, you can analyze it by displaying related data on a more detailed level.

You set up this behind-the-scenes data in the Query Panel.

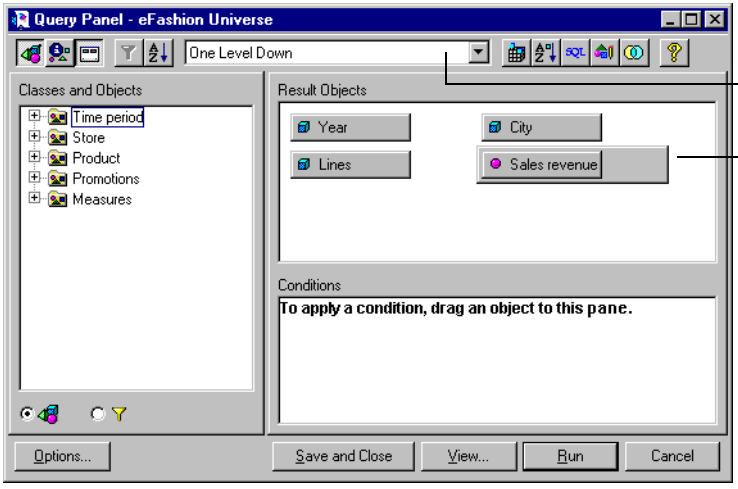
When you set up a report for analysis in drill mode, you include:

- high- level objects to display in your table or chart
- more detailed objects in your scope of analysis

BusinessObjects retrieves the more detailed objects from the database and stores them behind the scenes in your report so that they are there when you need them.

You prepare to access this behind-the-scenes data by setting the scope of analysis from the Query Panel.

To access the Query Panel, click the **Edit Data Provider** button on the Standard toolbar.




Set how many levels of detail you want to be able to drill down for the objects that display in the report. These drillable levels are defined by the Universe designer and are known as *hierarchies*.

For more information on hierarchies and setting up data for drill mode, see the *BusinessObjects User's Guide: Accessing Data and Data Analysis*. The aim of this lesson is to show you how to use drill mode in a report that has been set up for drill mode analysis.

# Open a document to analyze

You're going to use a document that has already been set up for analysis in drill mode. To open this document:

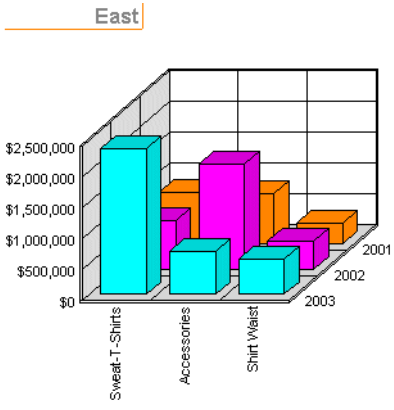
1. From the **File** menu, click **Open**.

   The Open dialog box displays.
2. Navigate to the **UserDocs** folder in the My BusinessObjects Documents folder.
3. Click to open **Revenue.rep**.

   - The document contains one report, Sales Analysis.

   - The report contains a chart showing Sales revenue for the top three selling product lines over the last three years.

   - The report is organized in sections, with one section for each of the four eFashion regions.




Let's look at the chart:

- Sales revenue in the Sweat-T-Shirt line has risen to an excellent level in 2003.
- Revenue in the ShirtWaist line has remained steady over the past three years.
- Your top revenue-making line, Accessories in 2001 sharply decreased in 2003.

What happened in 2003? Let's try to pinpoint the problem in this line by looking at the chart in drill mode.

# Open drill mode

Drill


To open drill mode:

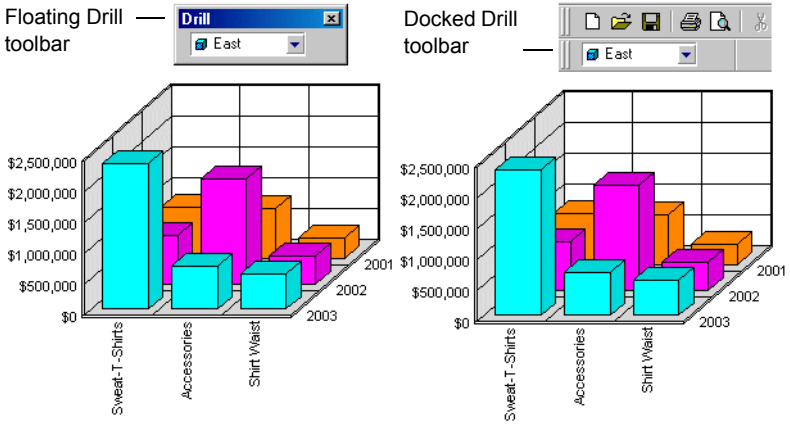
1. Select the chart.
2. Click **Drill** on the **Standard** toolbar.

   A new report appears that contains a copy of the selected chart. The report tab displays the drill icon to show you are in drill mode. The original report remains intact.

   The Drill toolbar displays. The Drill toolbar displays East because you selected the chart in the section East region.

**TIP**

*If you have not selected any table, chart or crosstab before you click drill, the cursor becomes a magnifying glass with a question mark next to it. If this happens, click on the chart to open drill mode.*

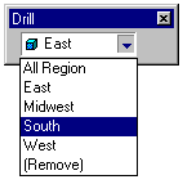



*Depending on how you've set up your toolbars, the Drill toolbar may be docked under other open toolbars or floating. Use the standard Windows method to dock or float the toolbars.*

First, let's see if the drop in Accessories revenue occurs only in the East or whether it's a region-wide drop.

To look at the data for a different region:

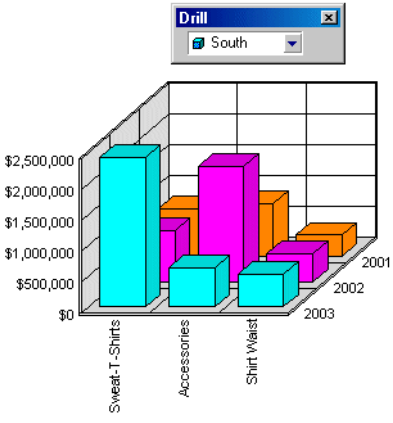
1. Click the drop-down arrow next to **East** in the **Drill** toolbar and click **South** from the list.




The chart updates to show the data for the South.

**NOTE**

You see that there have been similar results in this region. If you look at the data for the other two regions, you see that this is a nationwide drop.




You do not need to investigate regional factors any further.

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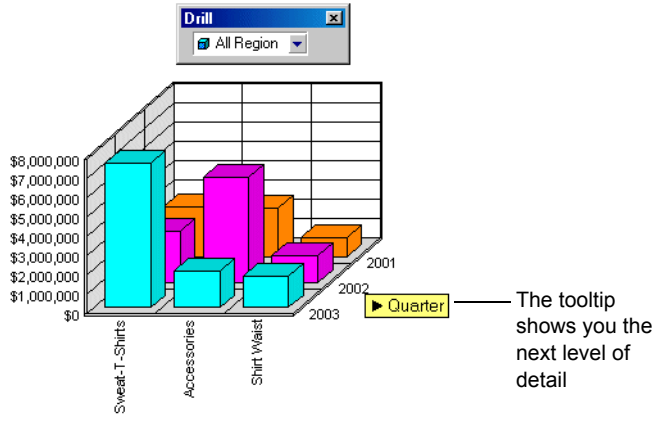
2. Click the drop-down arrow next to **South** in the **Drill** toolbar and click **All Region** from the list.

   The chart updates to show the data for all eFashion regions.

# Drill down for more detail

There has been a steep decline in revenue from 2001 to 2003 so let's look at the year 2002 in more detail.

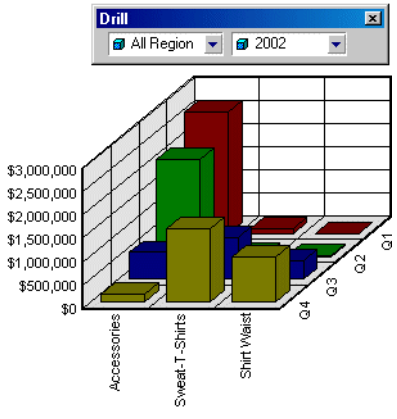
If you hold your cursor over the year 2002, you see that the next level of detail is Quarter. Let's drill down to quarter to look at how the accessories line performed over the four quarters of year 2002.




To do this:

- Right-click on 2002 and click **Drill Down** from the menu.

  The data for quarter appears in the chart and the selected value, year 2002 appears in the Drill toolbar.



**NOTE**

You see that the accessories line was doing extremely well in Q1 and Q2 and then there was a steep drop in Q3 followed by a further drop in Q4.

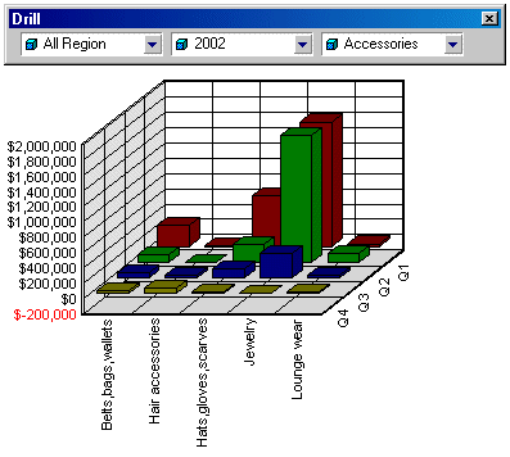
---


**What happened with the this line in Q3?**

Let's look more closely at the accessories product line. If you hold your cursor over accessories, you see that the next level down is category. Let's look at this to see whether certain categories of products are responsible for the decline in revenue or whether this is an overall trend.

To do this:

- Double-click **Accessories** to drill down to Category.




**TIP**

*You may need to enlarge the size of the chart at this point to see all the data.*

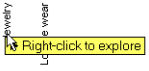
---

You see that Jewelry was the top-selling category in Q1 and Q2 and then went into steep decline over Q3 and Q4. This looks like a problem.

**Why did jewelry revenue decline so drastically?**

Let's drill down on Jewelry and see if you can pinpoint the problem area.

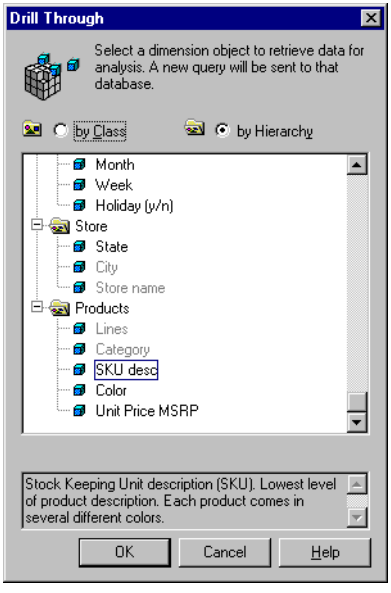
# Drill through to get more data




When you hold your cursor over Jewelry, you now see that the tool tip displays *Right-click to Explore*. This means there is no further data to drill down to in the document. No problem. You can drill through to the database and get the next level of data to continue your analysis.

To do this:

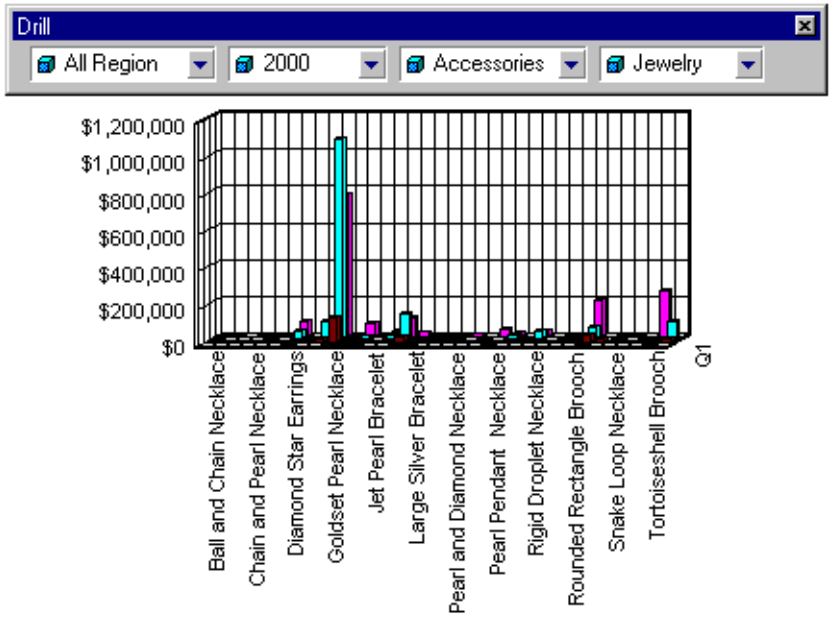
1. Right-click **Jewelry** and choose **Drill Through** from the menu.
   The Drill Through dialog box displays.




   The next level down from Category is SKU description.

2. Select **SKU description** in the list and click **OK**.
   BusinessObjects connects to the database and retrieves the requested data.

This may take a few moments.
The data for SKU description displays in the chart.



# Limit the data displayed in the chart

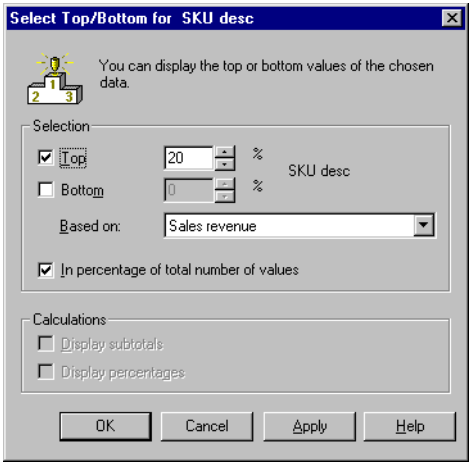
There's a lot of data in this chart and although you can see that one particular product has had a dramatic decrease in revenue, it's difficult to pinpoint which one it is. Let's limit the data displayed by only displaying the products that make up the top 20% of revenue. To do this:

1. Click one of the SKU descriptions on the chart.

   You see the yellow background text, *Right-click to explore*.

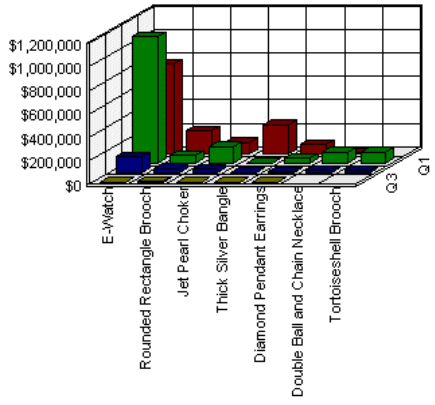
2. Click **Rank** on the **Report** toolbar.

   The Rank dialog box displays.




3. Click **Top**.
4. Click *In percentage of total number of values*.

5. Type **20** in the Top box and click **OK**.




Clearly the problem lies with the E-watch line. Sales for this line were excellent in Q1 and Q2 and then there was a sharp decrease in revenue in Q3 followed by a continuing decline in Q4. To look at the exact figures for these four quarters, let's turn the chart to a crosstab.

To do this:

- Right-click the chart and choose **Turn to Crosstab** from the menu.

  The figures show an overall decline in accessories revenue but the fall from $1,081,320 in Q2 to $133,725 in Q3 is extremely worrying.

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| E-Watch | 769,347.10 | 1,081,320.10 | 133,724.90 | 1,133.00 |
| Rounded Rectangle Brooch | 196,056.20 | 67,492.60 | 37,097.20 | 3,283.00 |
| Jet Pearl Choker | 97,111.10 | 141,793.20 | 30,511.40 | 716.00 |
| Thick Silver Bangle | 247,622.70 | 108.00 | 365.00 | 272.50 |
| Diamond Pendant Earrings | 78,481.70 | 40,856.40 | 5,005.00 | 269.00 |
| Double Ball and Chain Necklace | 8,716.20 | 97,596.90 | 17,927.00 | |
| Tortoiseshell Brooch | | 93,455.20 | 18,657.20 | |

# Send the document by email

Let's send the results of this analysis to the product manager in charge of the E-watch line and ask for an explanation of this dramatic fall in revenue.

To do this:

- From the **File** menu, click **Send To**, then **Mail**.
  The a new email message window appears with your document attached.

**NOTE**

You can send BusinessObjects documents by email if you have Microsoft Outlook installed on your computer.

# How Much Revenue Did This Product Line Make This Week?

lesson 8

# Overview

In this lesson:

- **Task objective**

How much revenue did this product line make this week?

- **Learning objective**

Learn how to set up a report to prompt users to choose which data they want to get from the database; how to refresh a report to get the up-to-date data.

- **Time**

15 minutes

- **Report**

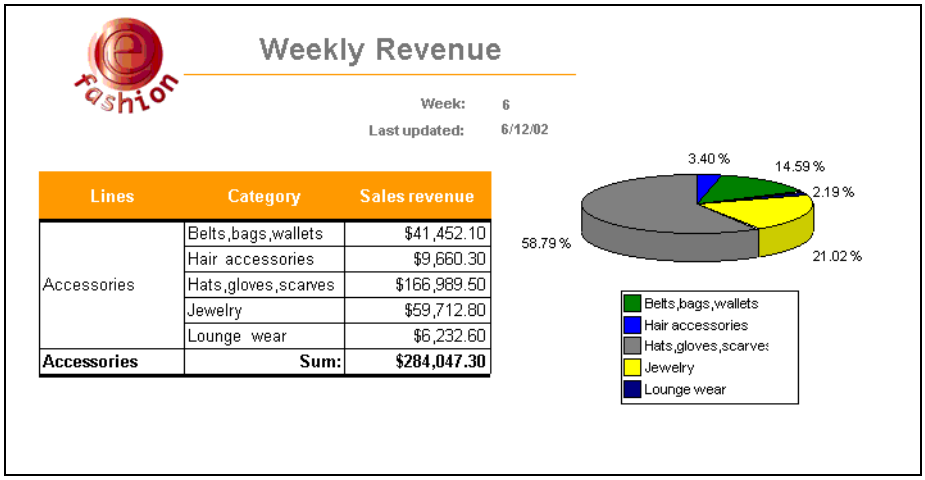
Tutorial.rep, Weekly Revenue

# Objective

Efashion publishes sales figures internally on a weekly basis. You want to set up a report that allows product managers to focus on the specific data that interests them. You think they need to view the weekly sales figures for:

- a chosen product line
- a chosen week

To do this, you are going to set up a query that prompts users when they refresh a document, to choose the product line and week for which they want to view data. This lesson takes you through the steps to set up the report below:




| Lines | Category | Sales revenue |
|---|---|---|
| Accessories | Belts,bags,wallets | $41,452.10 |
| | Hair accessories | $9,660.30 |
| | Hats,gloves,scarves | $166,989.50 |
| | Jewelry | $59,712.80 |
| | Lounge wear | $6,232.60 |
| **Accessories** | **Sum:** | **$284,047.30** |

**NOTE**

This is the last lesson of this tutorial. Some of the tasks you have to carry out to complete this lesson are recap tasks that are described in detail elsewhere in this tutorial. The procedures for recap tasks do not appear in detail in this lesson.

# Set up a new query

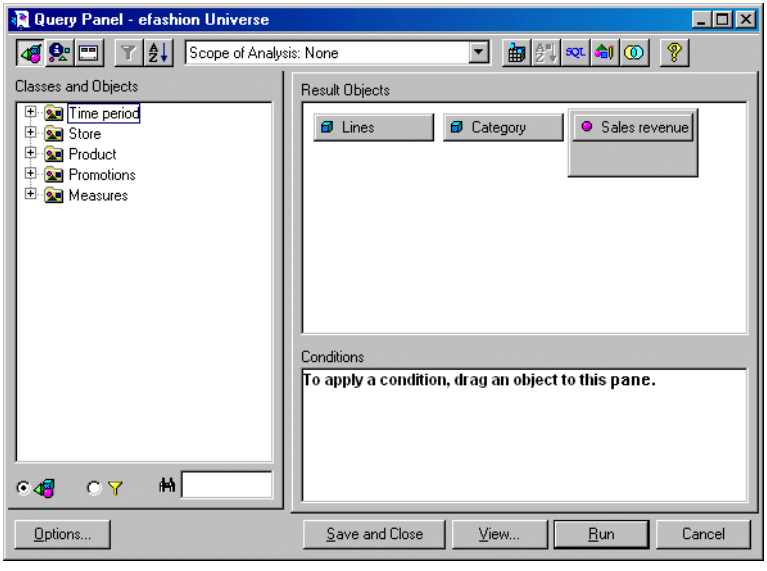
You are going to set up a new query in a new BusinessObjects document and then set conditions to prompt users to specify which data they want to have displayed in the report. This allows them to focus on the specific data that interests them.

## Create a new report

New Report Wizard

First, set up the basic query.

1. Click **New Report Wizard** on the **Standard** toolbar.
   The New Report Wizard opens up.
2. Choose **Select a template** and click **Begin**.
3. Choose **EFASHION** from the Available Templates list and click **Next**.
4. Choose **Universe** and click **Next**.
5. Choose **efashion** from the list of universes and click **Finish**.
   The Query Panel appears.
6. Add **Lines**, **Category** and **Sales revenue** to the Result Objects section.
   The Query Panel looks like this:

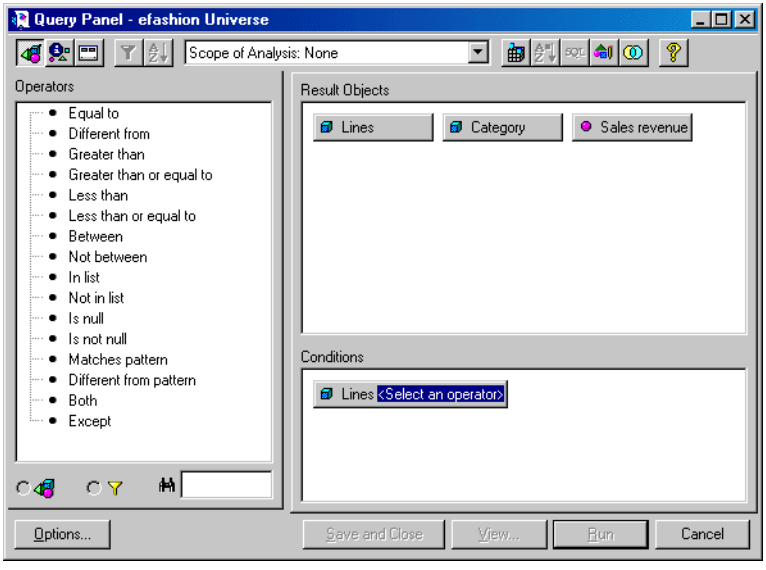


## Focus on specific data

You want to allow users to specify two types of data, which product line they want to display data for and which week. First, let's set up the condition for product line. To do this:

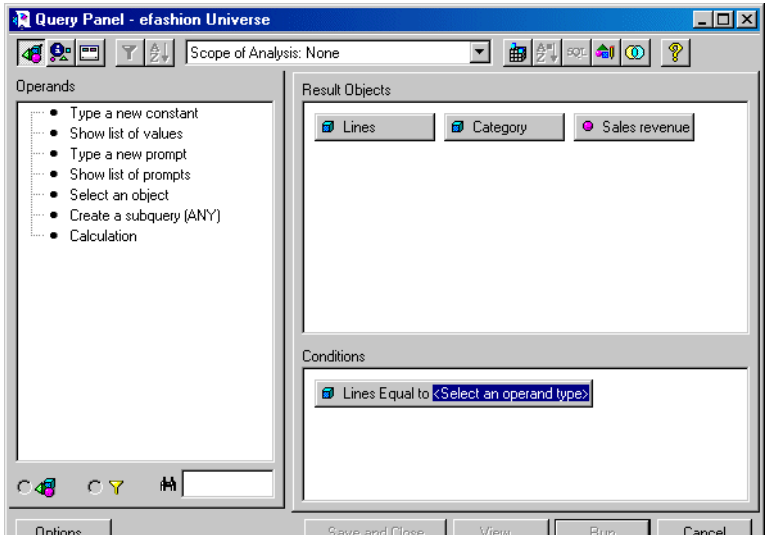
1. From the Product folder, drag **Lines** to the Conditions section.

   The Classes and Objects list turns into the Operators list.

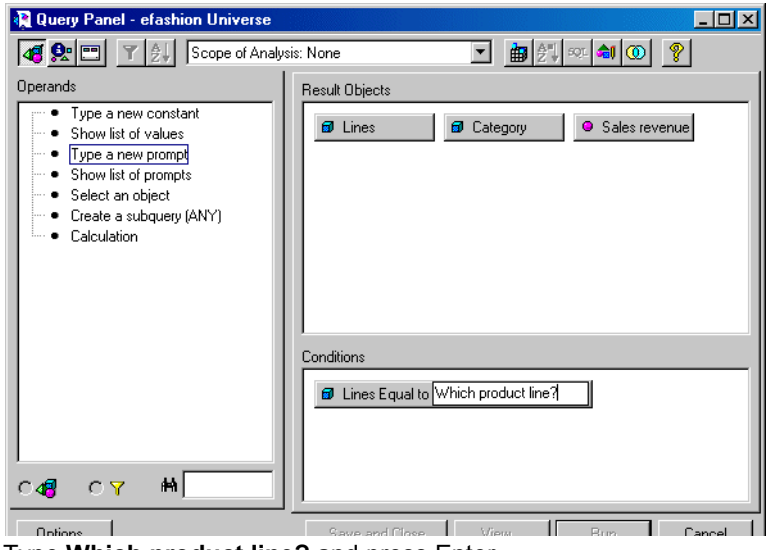



2. Double-click **Equal to** in the Operators list.

The Operators list turns into the Operands list.



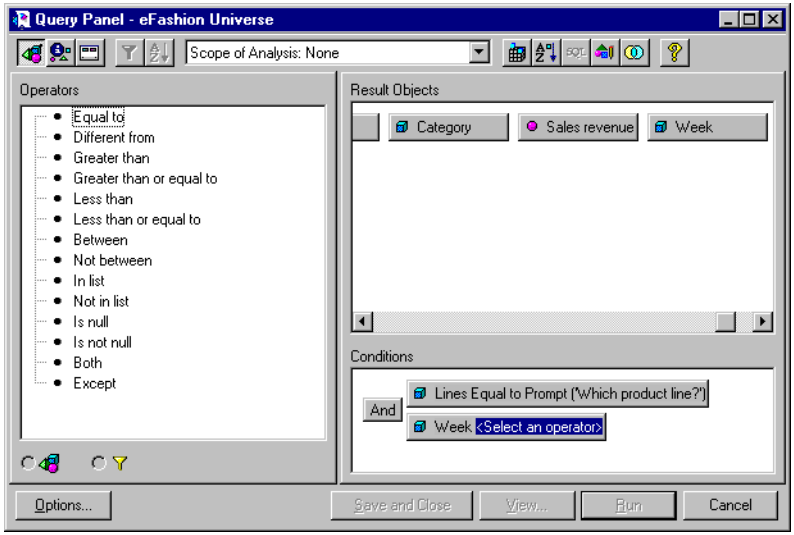

3. Double-click **Type a new prompt** in the Operands list.



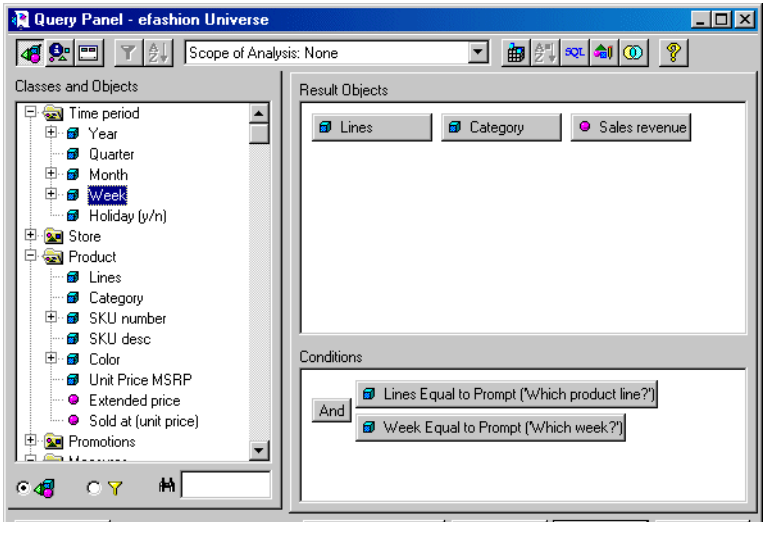

4. Type **Which product line?** and press Enter.

Next, set up a second condition to limit the data retrieved to the specified week:

1. Open the Time folder and drag **Week** to the Conditions section.



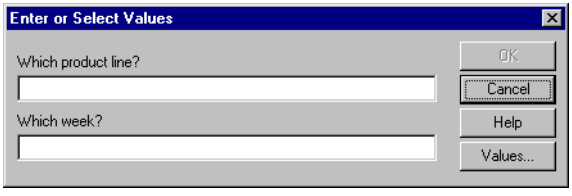

2. Double-click **Equal to** in the Operators list.
3. Double-click **Type a new prompt** in the Operands list.
4. Type **Which week?** and press Enter.



## Get the data

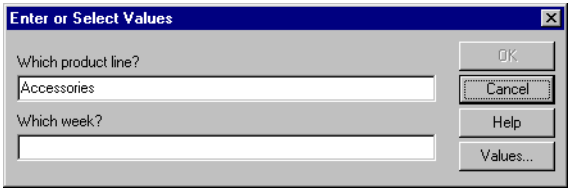
You are now ready to run the query and retrieve the data. To do this:

1. Click **Run** on the Query Panel.
   The Enter or select values dialog box opens.

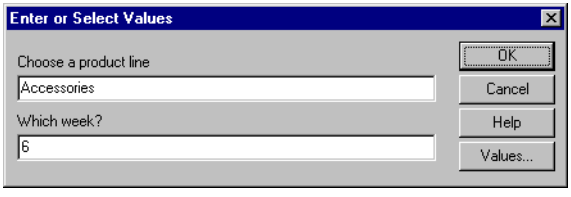



2. Click the **Which product line?** box and click **Values**.
   The List of Values box opens. This box displays a list of all the available product lines.

3. Click **Accessories** from the list and click **OK**.
   Accessories displays in the Enter or Select Values box.




4. Click the **Which week?** box and click **Values**.
   The List of Values box opens, displaying a list of all the available weeks.
5. Choose **6** from the list and click **OK**.




6. Click **OK** to display the data in the report.


<Title>

<add comment>

| Lines | Category | Sales revenue |
|---|---|---|
| Accessories | Belts,bags,wallets | $41,452.10 |
| Accessories | Hair accessories | $9,660.30 |
| Accessories | Hats,gloves,scarves | $166,989.50 |
| Accessories | Jewelry | $59,712.80 |
| Accessories | Lounge wear | $6,232.60 |

7. Click **Save** from the **File** menu before proceeding to the next section.

# Format the report

Your data displays in a table. The report contains the corporate logo and a placeholder for a title and a comment. First, let's give the report a title.

- Double-click on **<Title>** and type *Weekly Sales*.

Next, let's format the table. You are going to insert a break on the Accessories column so that accessories does not repeat several times and so that accessories centers across the categories it describes.

Insert Break

To do this:

1. Click the **Accessories** column.
2. Click **Insert Break** on the **Report** toolbar.
3. Click the Accessories column again, then click **Center Across Break** on the **Formatting** toolbar.

Center Across Break

Next, add a total.

Sum

- Click the **Sales revenue** column and click **Sum** on the **Report** toolbar.

Because you have inserted a break, you have two total rows, one for the Accessories subsection and one for the whole table. Since Accessories is the only subsection in this table, the totals are the same, so you can delete one of these rows.

To do this:

- Select the last row and click **Delete**.

Your table now looks like this:

| Lines | Category | Sales revenue |
|---|---|---|
| Accessories | Belts,bags,wallets | $41,452.10 |
| | Hair accessories | $9,660.30 |
| | Hats,gloves,scarves | $166,989.50 |
| | Jewelry | $59,712.80 |
| | Lounge wear | $6,232.60 |
| **Accessories** | **Sum:** | **$284,047.30** |

# Add tracking information

This report is regularly updated with new data so you are going to add some tracking information so that you know exactly how old the data is. This is easy to do in BusinessObjects because you can insert commonly used types of tracking information in special fields that are automatically updated every time you update the data in a document.

The report contains data for a specified week so it's useful to have this information visible somewhere. This is the week you chose when you ran the query. You can insert a query prompt, such as week, directly from the Insert menu. But first, let's add a caption.

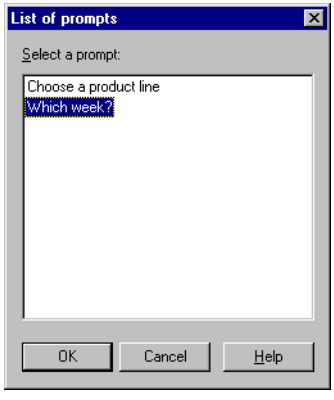
To do this:

- Double-click on **<add comment>** and type **Week***:*

Next, let's add the special field.

1. Copy the *Week:* cell and paste the copy to the right of the original.
2. Select the second *Week:* cell.
3. From the **Insert** menu, click **Special Field** and then **Query Prompt**.

   The List of Prompts dialog box displays. This box displays the list of prompts from your query.




4. Choose *Which week?* from the list and click **OK**.

   The week you chose when you ran the query displays in the selected cell.

You are now going to add the date the report was last updated in the same way.

1. Copy the *Week:* cell and paste the copy under the original Week: cell.
2. Change the text to display *Last updated:*
3. Copy the *Last updated:* cell and paste the copy to the right of the original cell.
4. Select the right-hand cell.
5. From the **Insert** menu, click **Special Field** and then **Date and Time**, then **Last Refresh**.

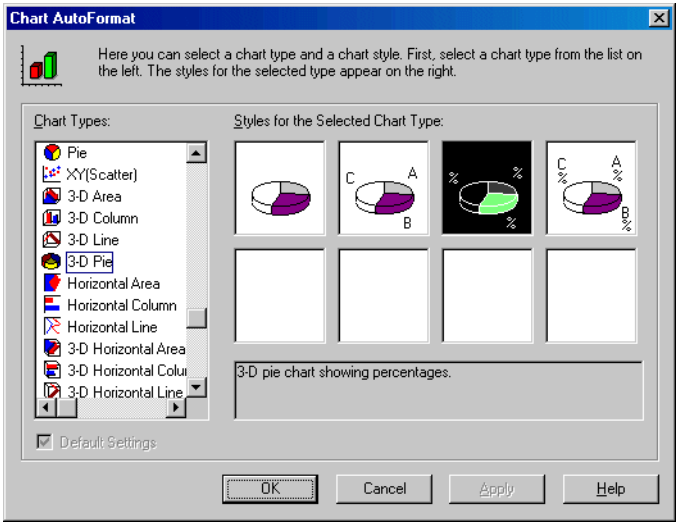
   The date the report was last updated, in fact the date you ran the query, inserts in the selected cell.

# Add a chart

To finish off the report, you are now going to add a chart to display a visual summary of the weekly sales revenue per category so that you can see at a glance the best-selling category of the week. To do this:

1. Drag and drop **Category** and **Sales revenue** from the Report Manager window to the Report window to create a table.
2. Right-click on the table and click **Turn to Chart** from the menu.

   The Chart AutoFormat dialog box opens.

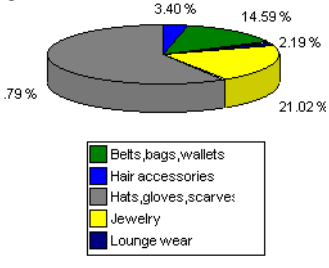



3. Choose **3-D Pie** from the Chart Types list and then the pie chart style with the % labels and click **OK**.

   The chart displays in the report.

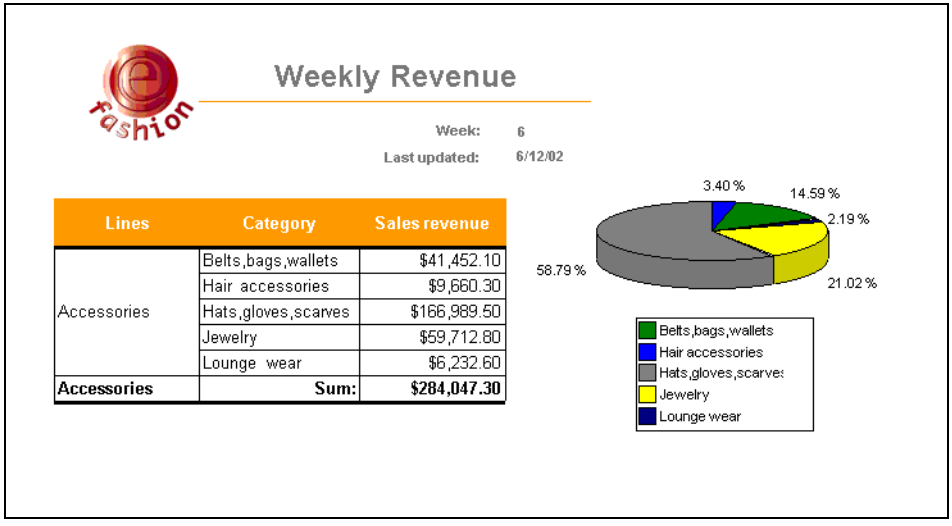
Show/Hide Legend

4. Select the chart and click **Show Chart Legend** on the **Report** toolbar.
5. Reposition the chart legend below the chart and resize the chart if necessary.



# The finished report

Your finished report now displays total weekly revenue for the Accessories product line with a breakdown of the figures per category. Hats, Gloves and Scarves were by far the best-selling category this week, making up 58% of total revenue.



Weekly Revenue

Week: 6

Last updated: 6/12/02

| Lines | Category | Sales revenue |
|---|---|---|
| Accessories | Belts,bags,wallets | $41,452.10 |
| | Hair accessories | $9,660.30 |
| | Hats,gloves,scarves | $166,989.50 |
| | Jewelry | $59,712.80 |
| | Lounge wear | $6,232.60 |
| **Accessories** | **Sum:** | **$284,047.30** |

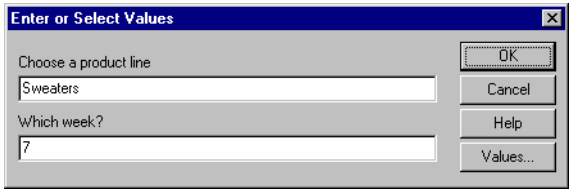
# Display different data for a different product line

Let's look at revenue for another product line, Sweaters for week 7. To do this, you are going to refresh the report:

Refresh

1. Click **Refresh** on the **Standard** toolbar.

   The Enter or Select dialog box displays.

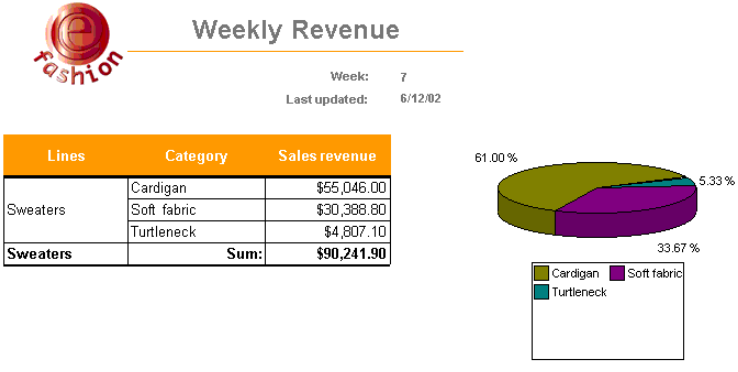



2. Click **Sweaters** from the product line and **7** from the week list, and click **OK**.

   BusinessObjects reconnects to the database, retrieves the requested data and updates the report with the new data, maintaining the report formatting and presentation.

   The table and chart update with sales revenue figures for Sweaters for week seven.

   Notice that the special field, week, also updates to 7.



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