NCDHHS

BusinessObjects Web Intelligence (WEBI) 4.3 “Fiori” User Interface Introduction & Primer

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I Launchpad Logon and Home

Introduction

The BI Launchpad has changed significantly in the look and feel as well as adding some new features. The new design is called Fiorified BI Launchpad and this guide will refer to the existing interface as Classic BI Launchpad.

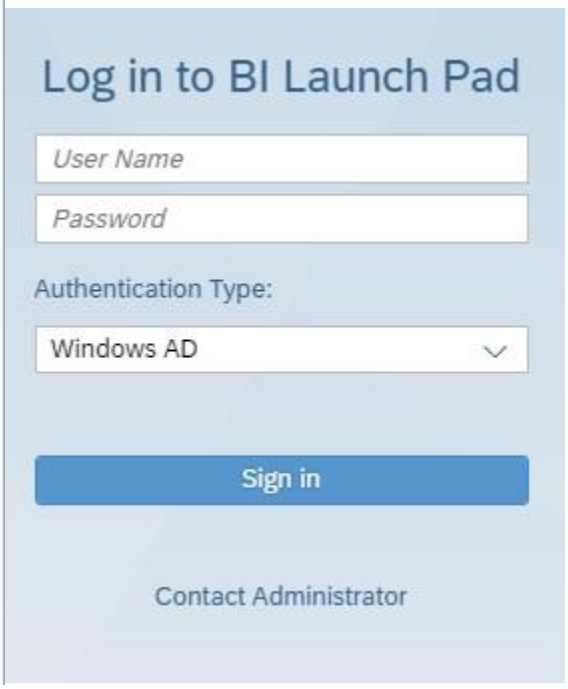
This guide is intended to give a comparison of the Classic BI Launchpad to the new Fiorified BI Launchpad and help existing users familiarize themselves with the new design.

Logging into BI Launchpad

Starting with the logon page you will notice the difference in style from the Classic BI Launchpad, however, the differences are mainly cosmetic. There is an addition of the Contact Administrator link that will open a new email to the BI Admins. Therefore, you can send an email if you have issues directly to the admins.

Classic Logon Page

Fiorified Logon Page

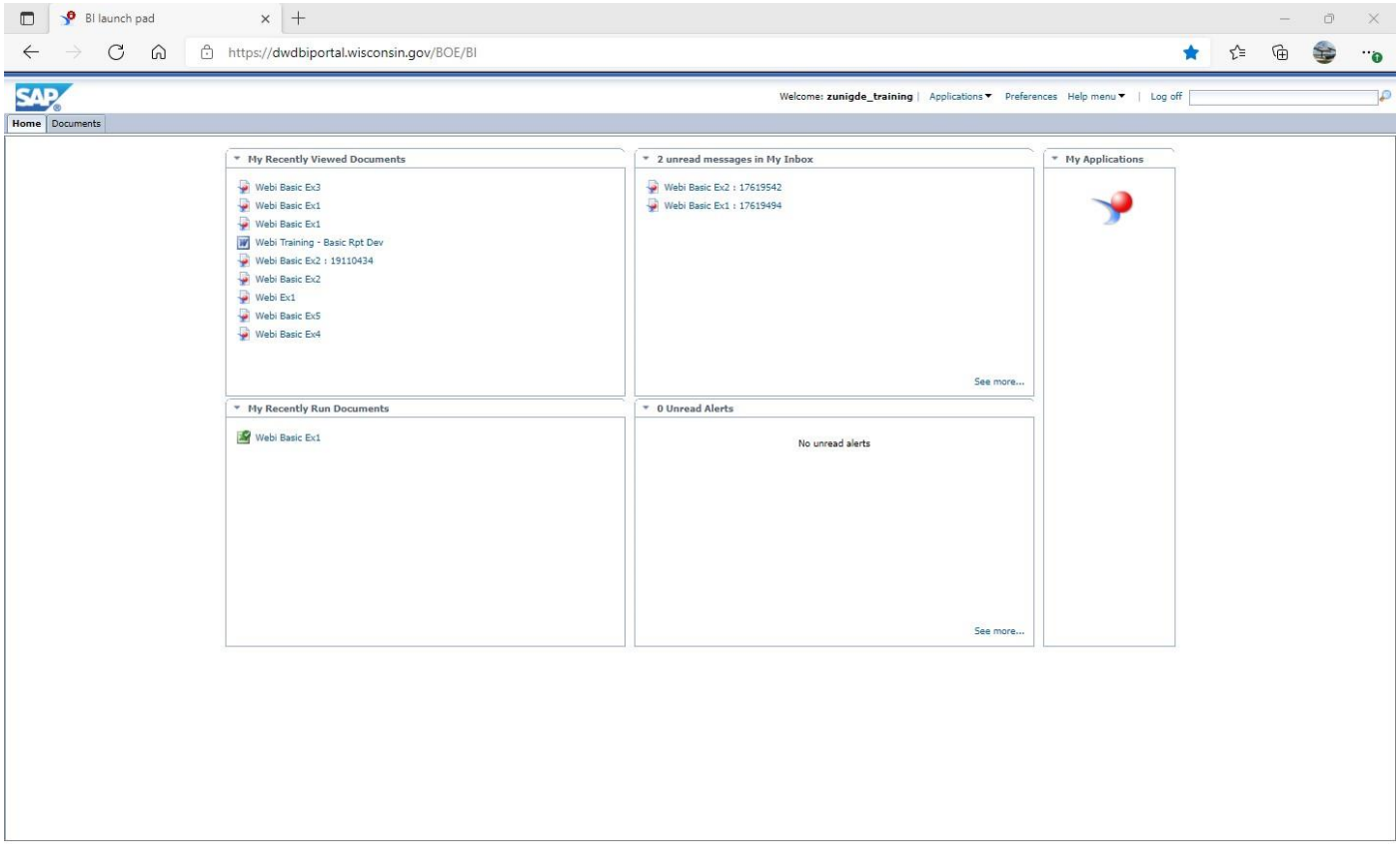


Home Screen

The home screen has changed significantly from the Classic BI Launchpad. Most users probably land on the folders section of the BI Launchpad but we will compare the home page here.

Classic Home Page

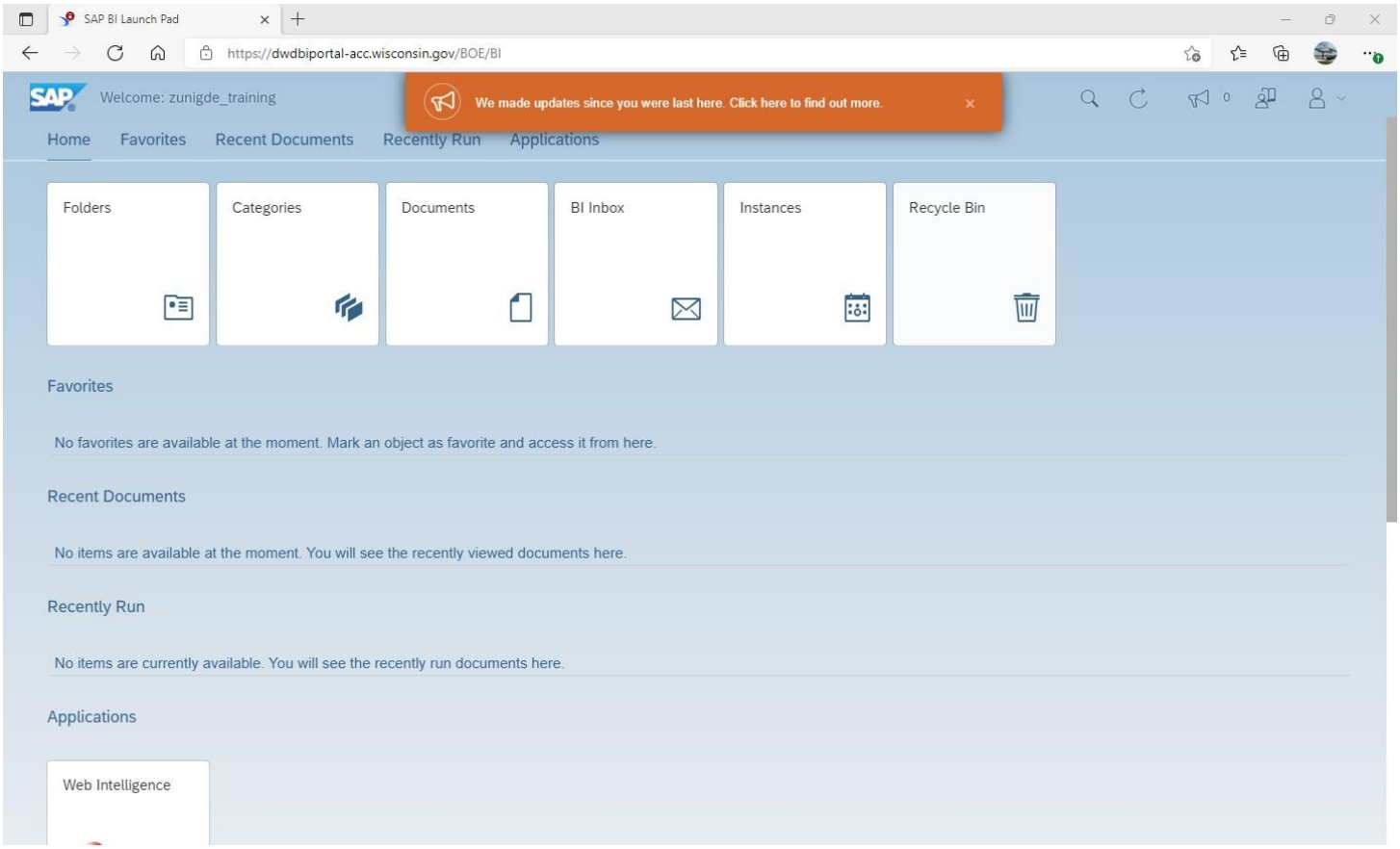
The classic home page contained Recently Viewed Documents, Unread BI Inbox messages, Recently Run Documents, Unread Alerts, and Applications.



Fiorified Home Page

The new Fiorified Home Page is significantly different. There are Recent Documents, Recently Run Documents, and Applications like the Classic Home Page but there are a number of "tiles" that give access to the Folders, Categories, Documents that the user has access to, the user's BI Inbox, Scheduled instances, and the user's Recycle Bin. Most of these features were present in the classic interface but the new design is meant to simply the navigation.

In the next few sections we will illustrate some of the new features as well as some of the navigational differences.

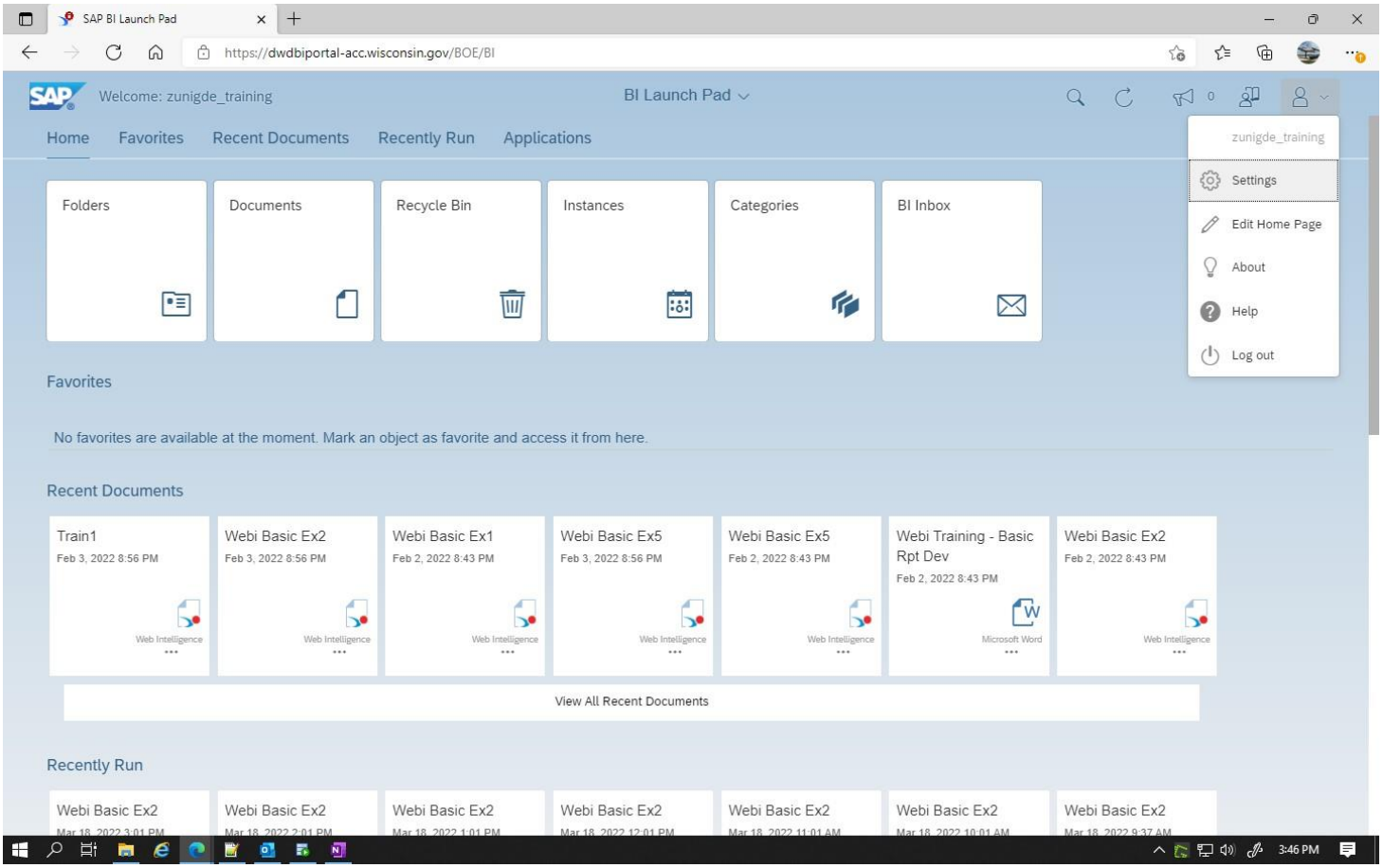


User Menu

The user menu is in the upper-right of the page and contains user settings, Edit Home Page, the about and online help, and the log out button.

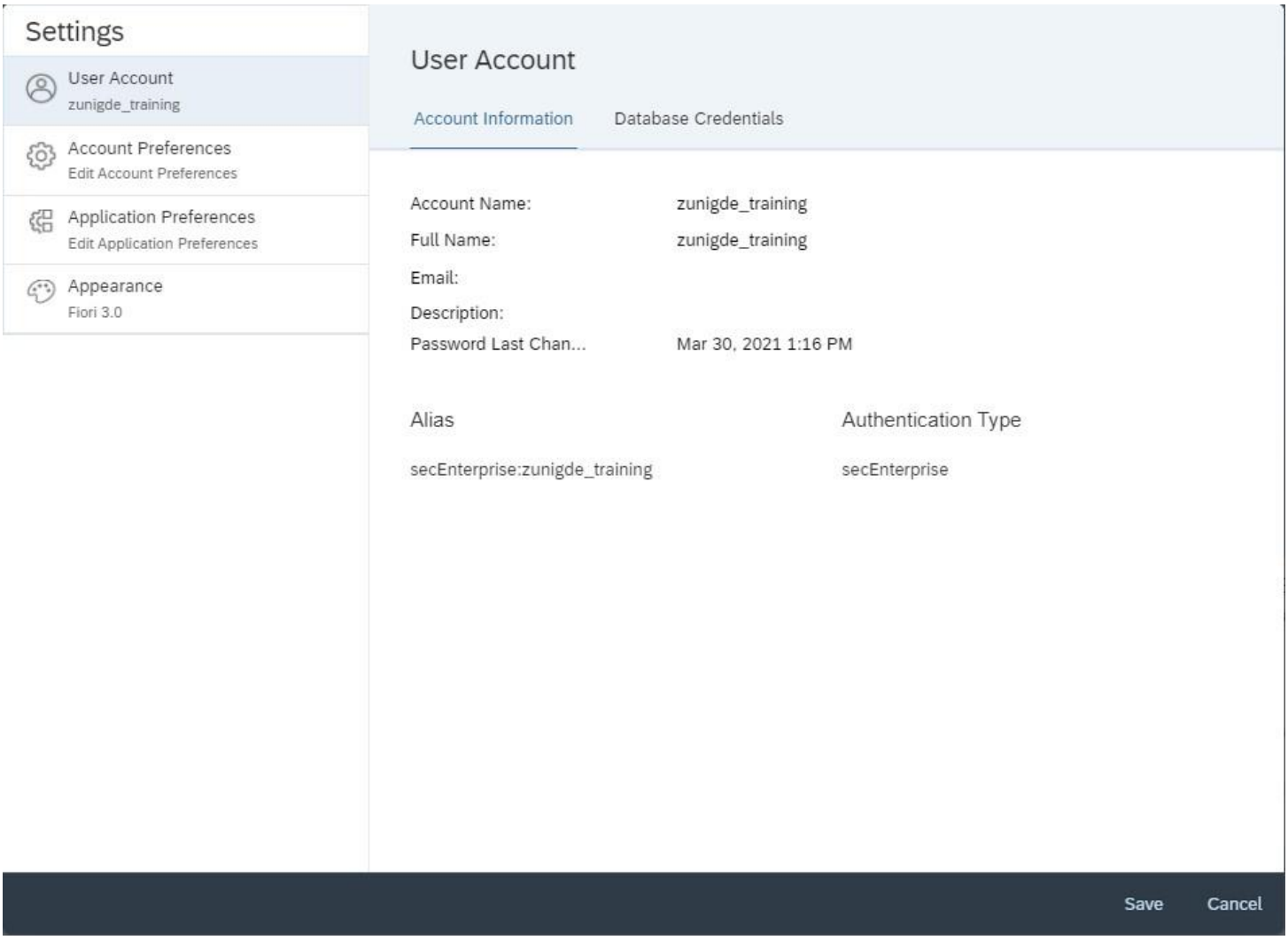
Settings

The user preferences are now under the user icon Settings. It is broken into sections for basic User Account settings, Account Preferences, Application Preferences, and Appearance.



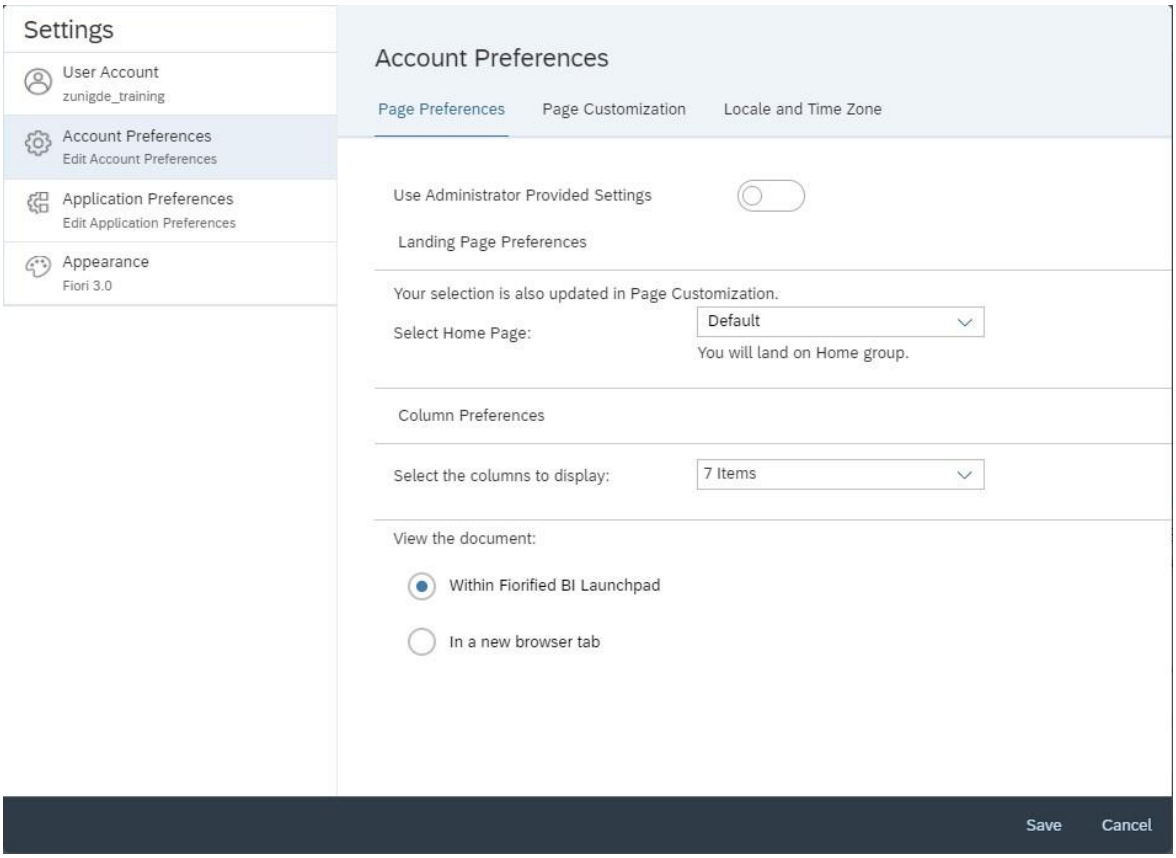
User Account

This contains basic user information and database credentials.

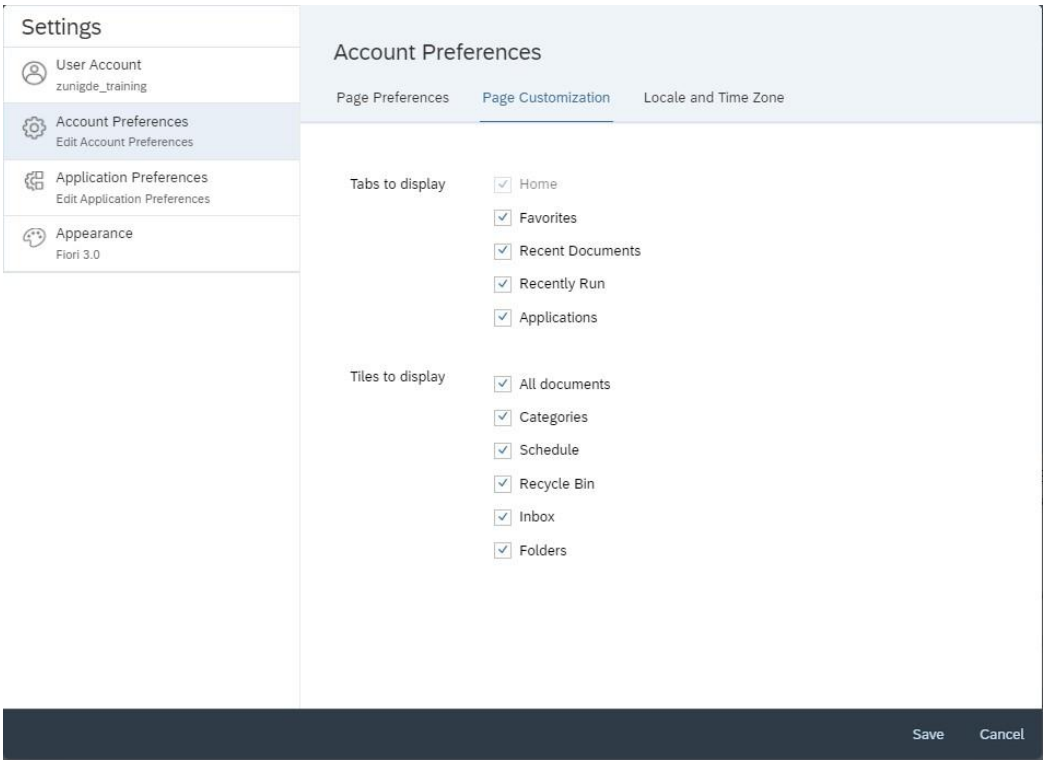


Account Preferences

Here you can set page preferences like the home landing page, what columns to display in the folders area, and how to view documents. You can also choose to use the default settings.

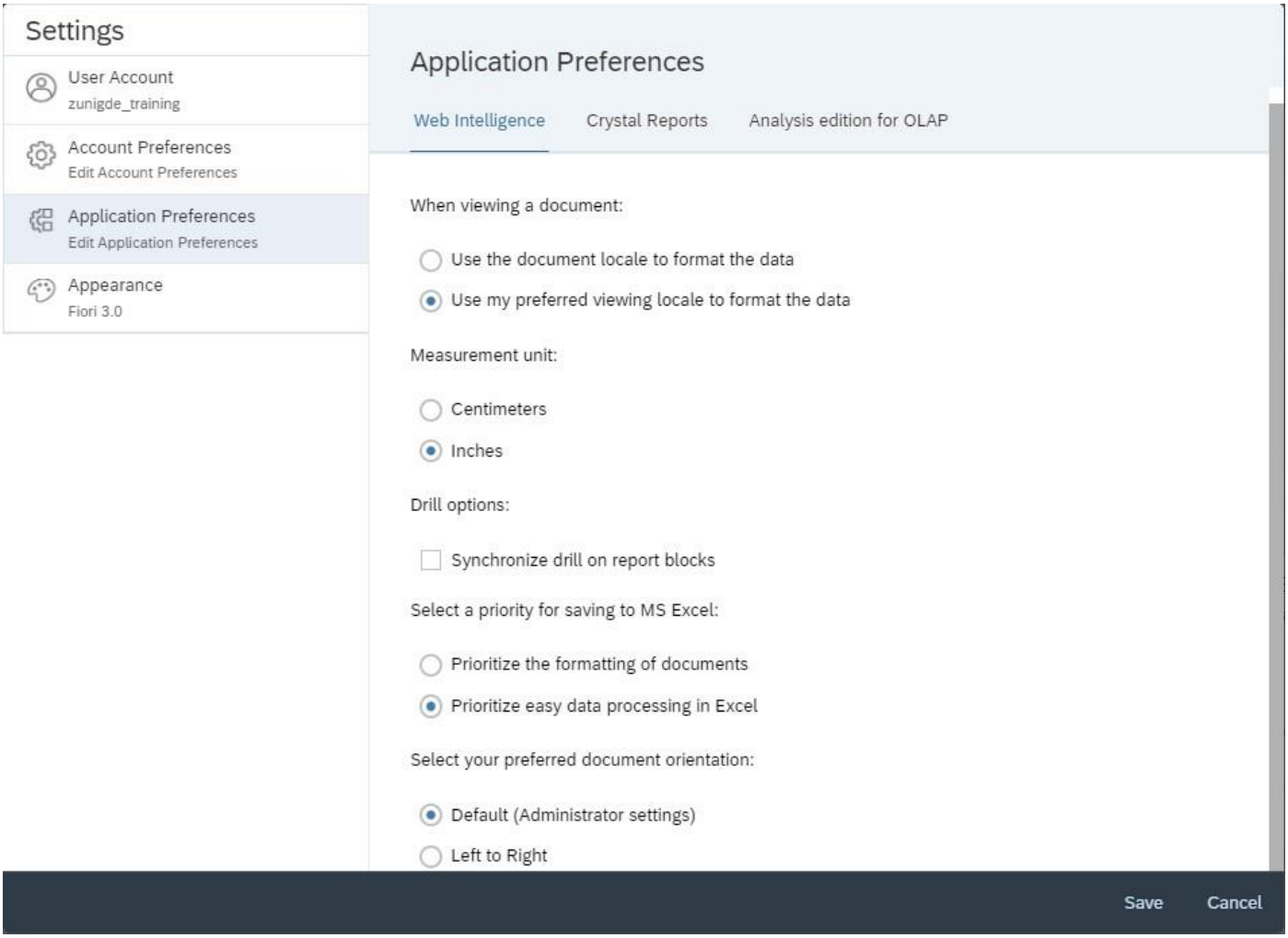


The page customization menu allows you to hide or show tabs and tile that are on the home page.



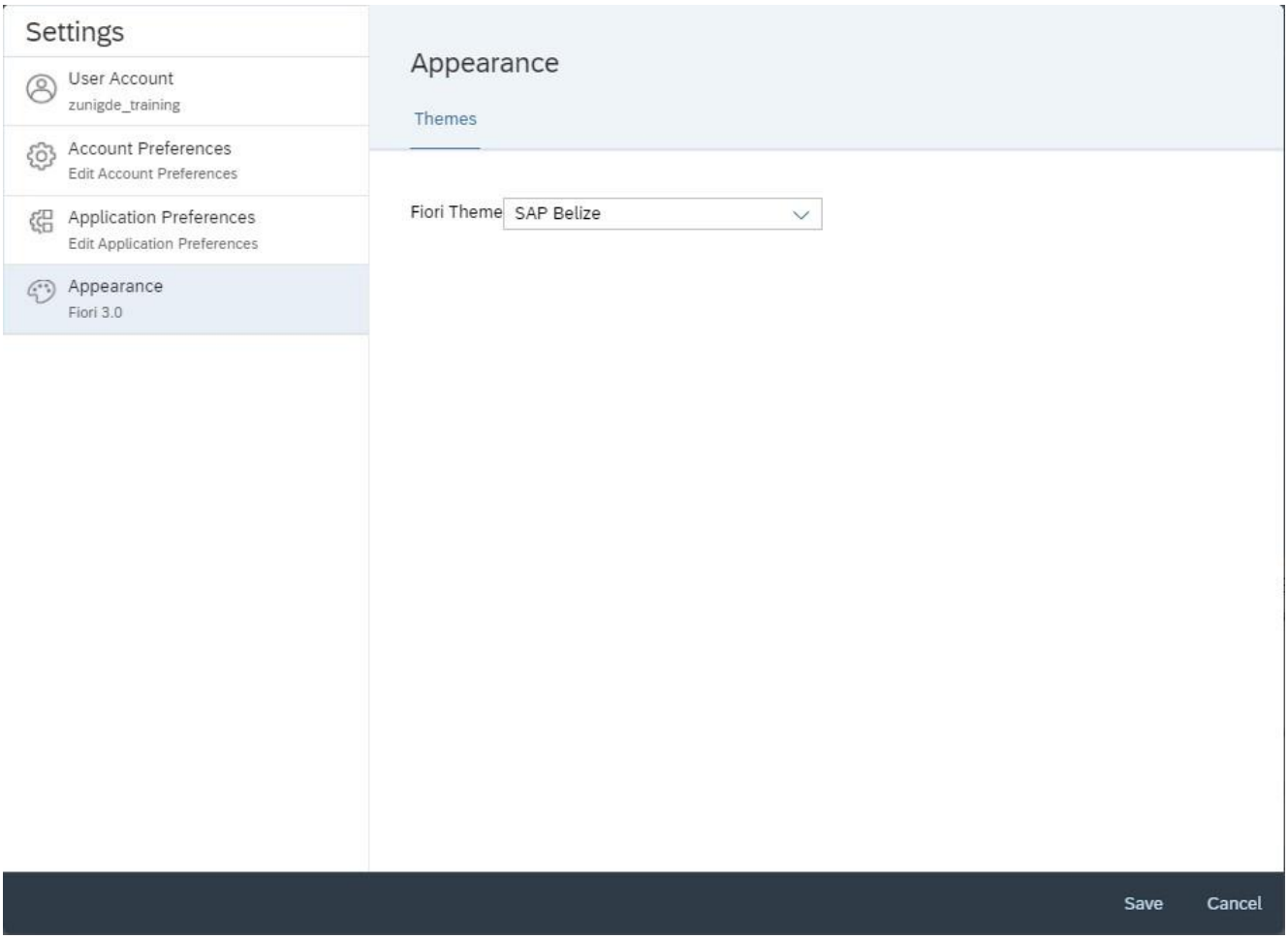
Application Preferences

Here is where you can change some basic settings for WebI. The other applications are not used in our environment.

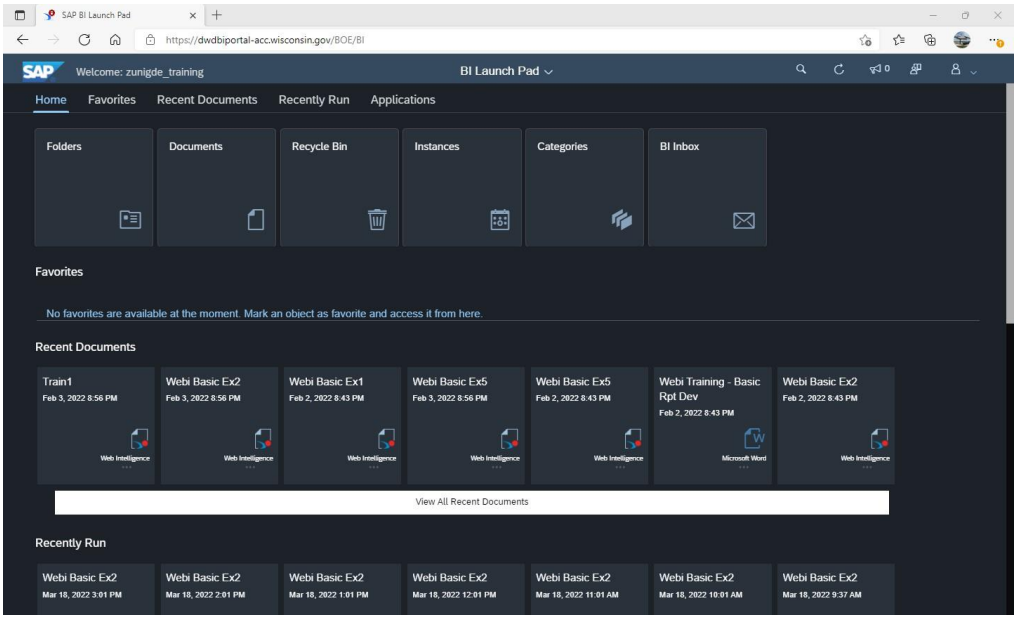


Appearance

Lastly, you change the theme of the BI Launchpad to suit your preferences. The default is the SAP Belize theme but there are other themes like dark themes that some prefer.

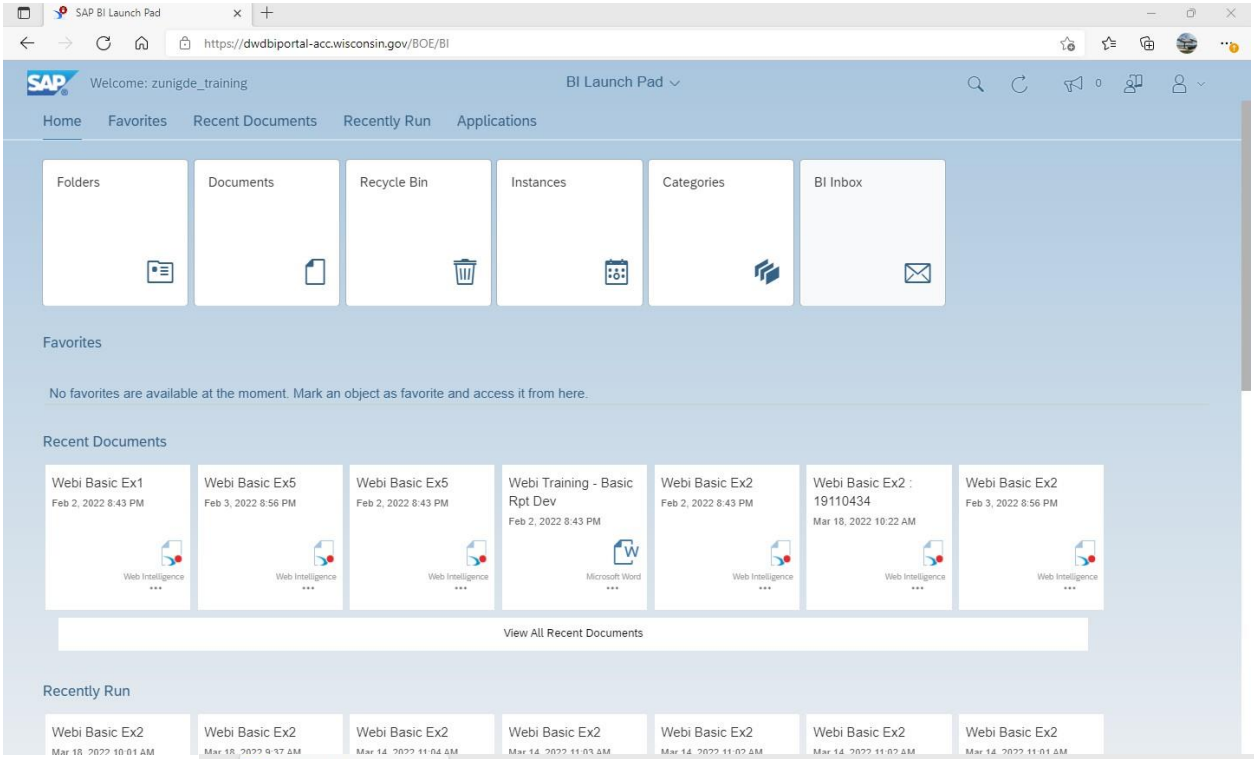


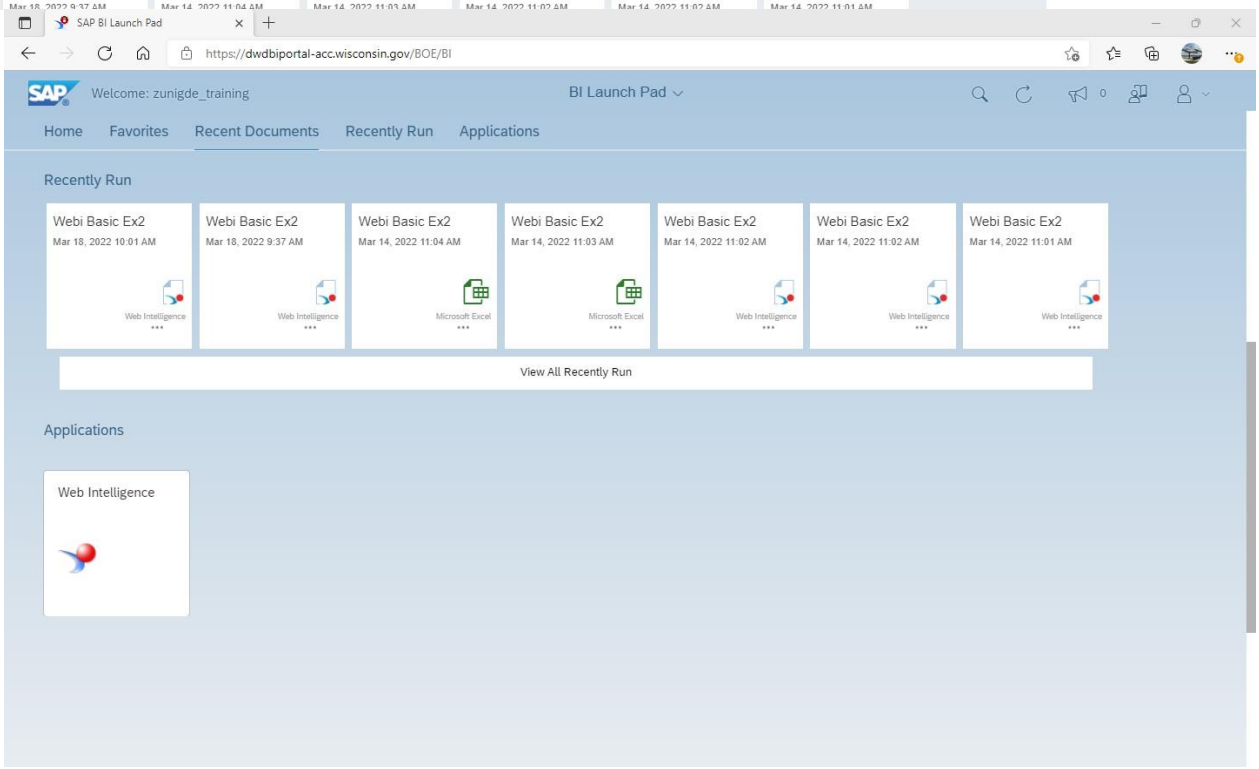
SAP Quartz Dark Theme



Navigating the BI Launchpad

From the BI Launchpad home you can navigate in a number of ways. You can click on one of the tiles to jump to a section of the BI environment like Folders, Recycle bin, Instances, etc. You also have access to view documents you mark as favorites and navigate to recently viewed and run documents. Scrolling down will also give you access to applications such as WebI.

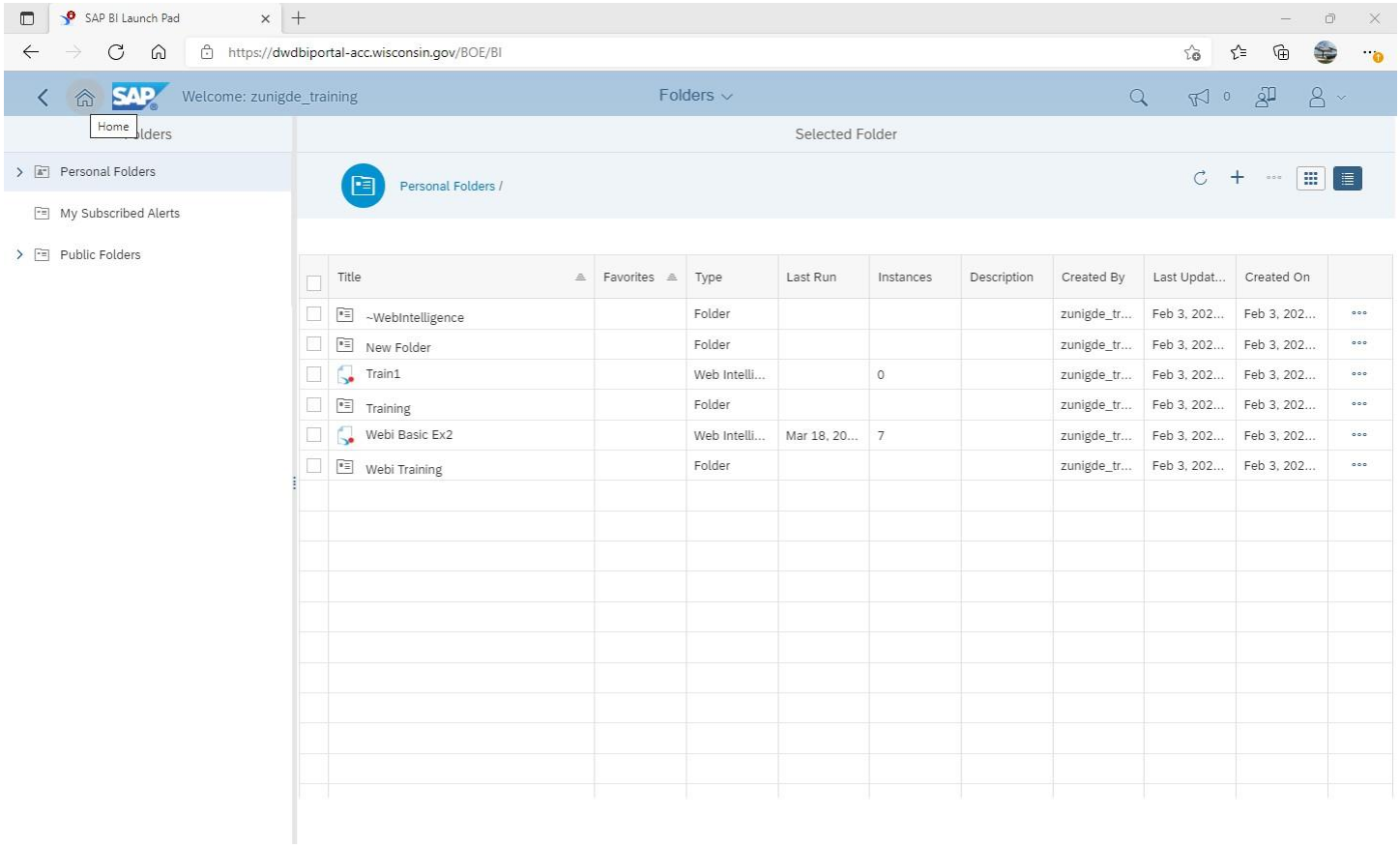




Once you have clicked on a tile like Folders in order to get back to the Home page you have a couple of options.

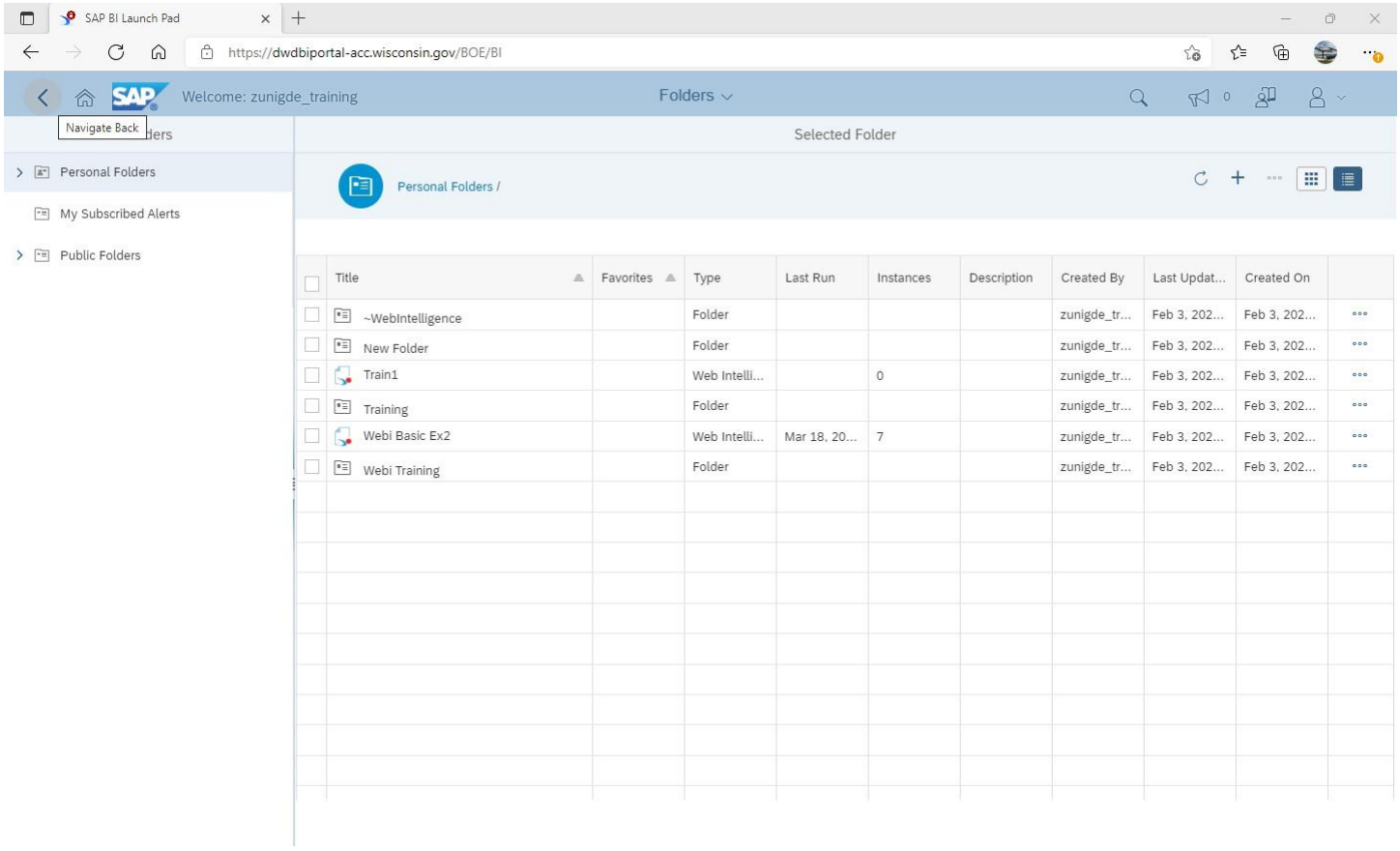
Home Button

You can click the Home icon at the top of the page to go back to the Home page from wherever you are in the BI Launchpad.



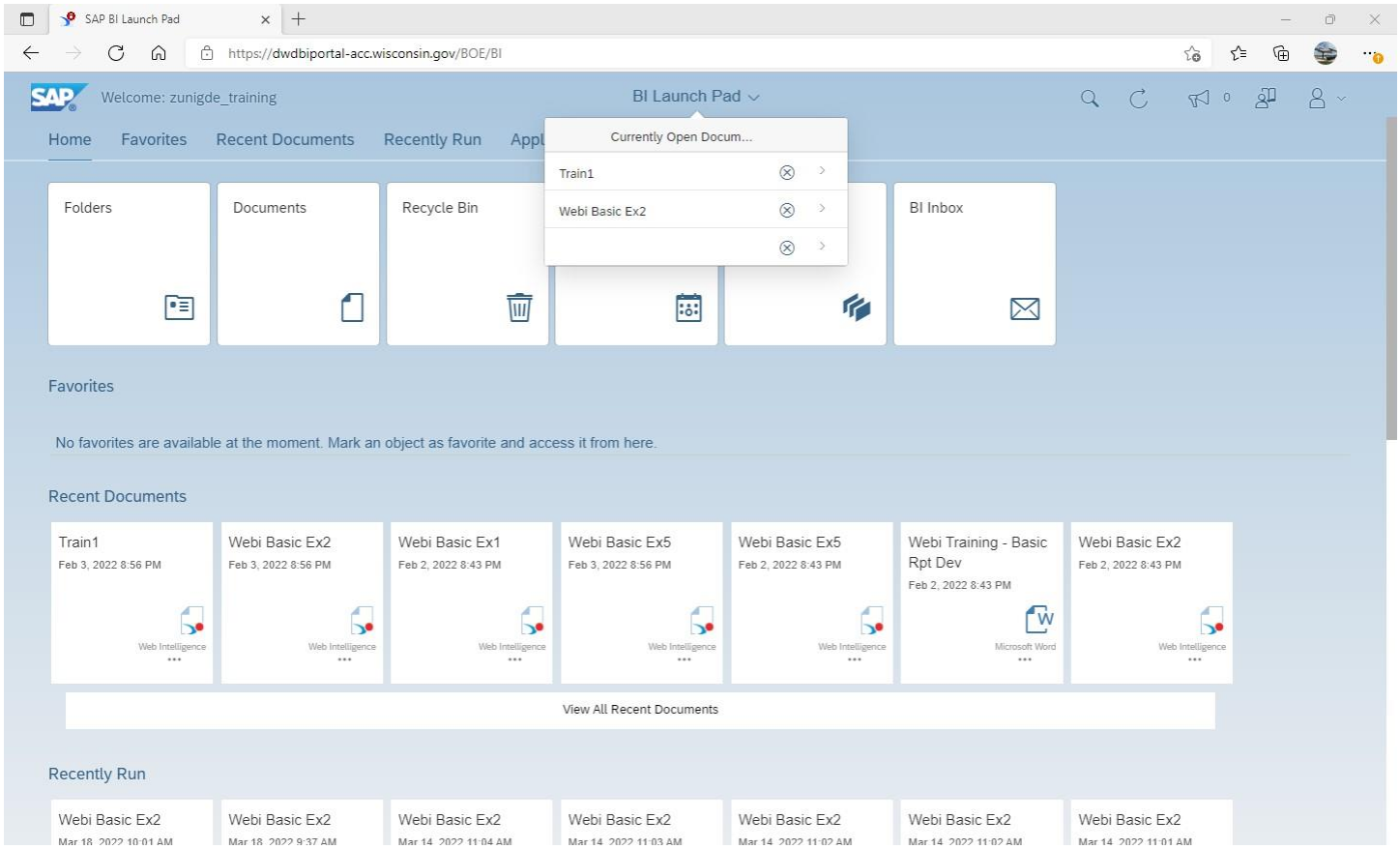
Navigate Back Button

You can click the < icon at the top of the page to go back to the previous page you visited. From any of the main tiles it will bring you back to the Home page.



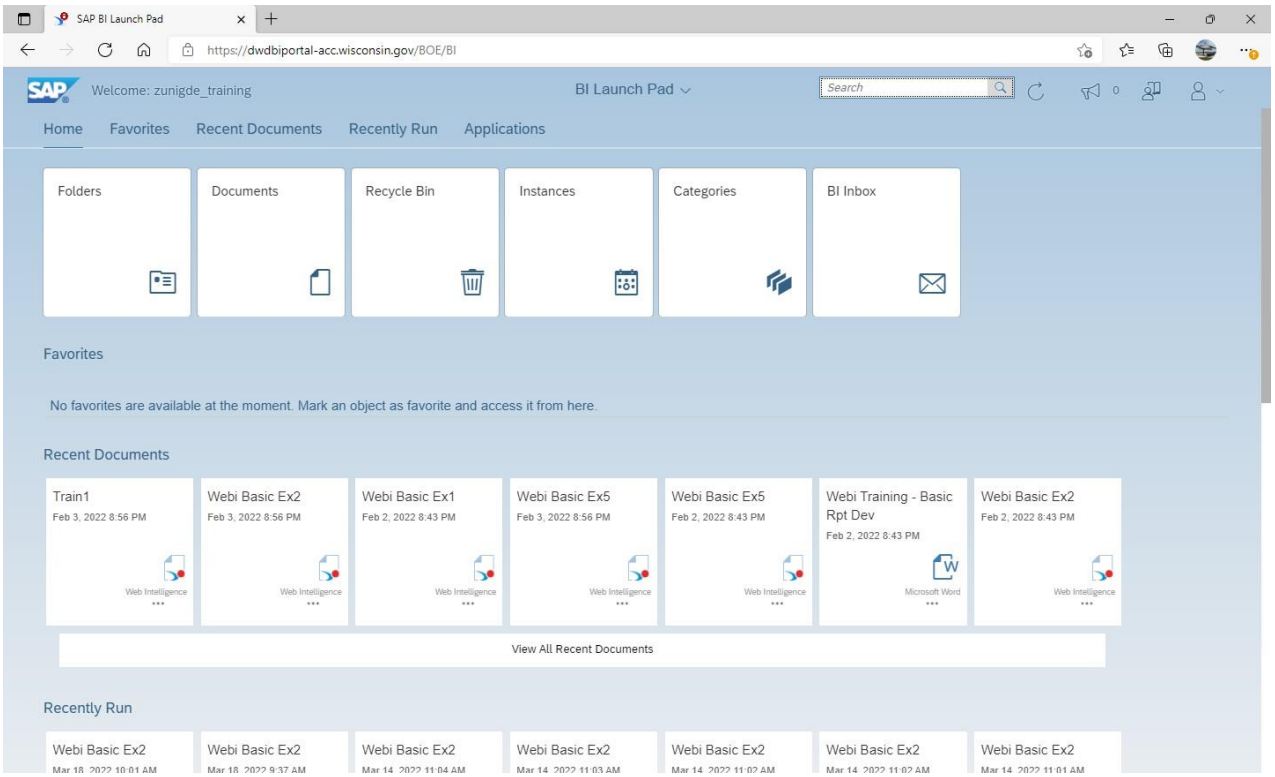
Navigating between Open Documents

Wherever you are in the BI Launchpad you can view, navigate to, and close currently open documents. Click on the dropdown on the center top of the screen. The label will change based on where you are within the BI Launchpad but this will always show the currently opened documents. To navigate to an open document click on the title. You can close open document as well by clicking the X next to the name of the document you wish to close. Once a document is open is remains open until you close it from this dropdown.

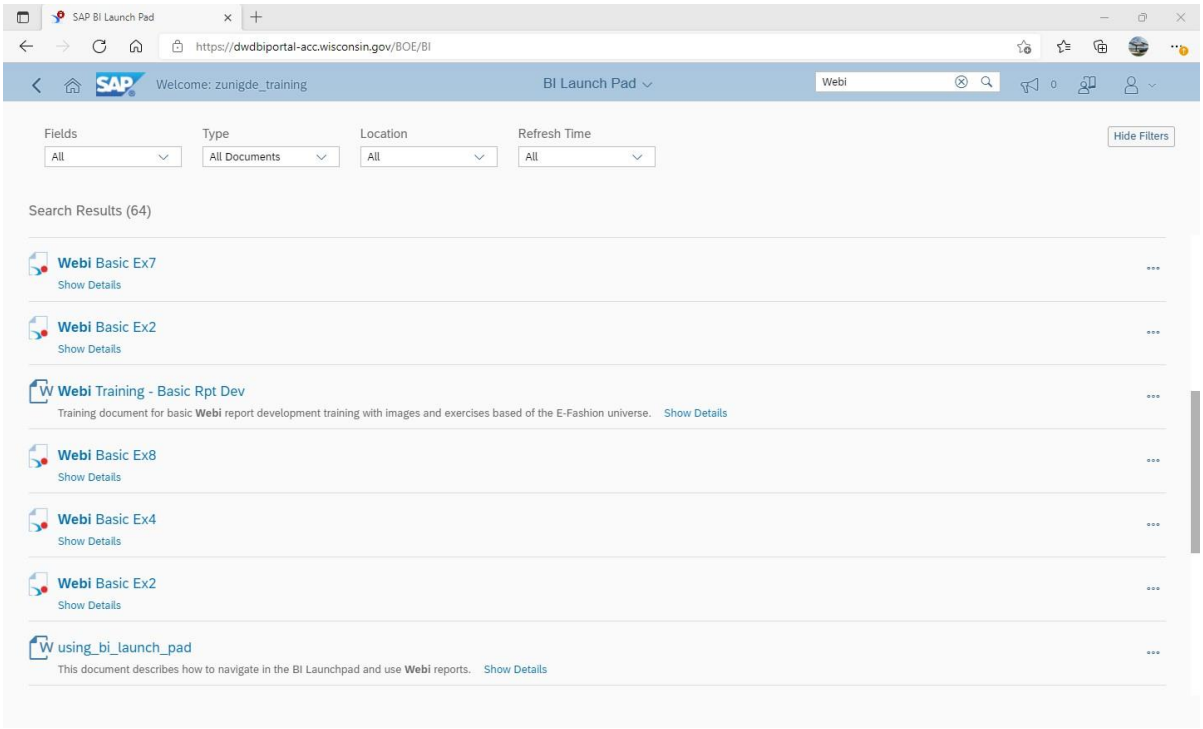


Searching

The search function is accessed by clicking the eyeglass icon on the upper right of the BI Launchpad. Once you click on the eyeglass you will get a text box where you enter the text to search.

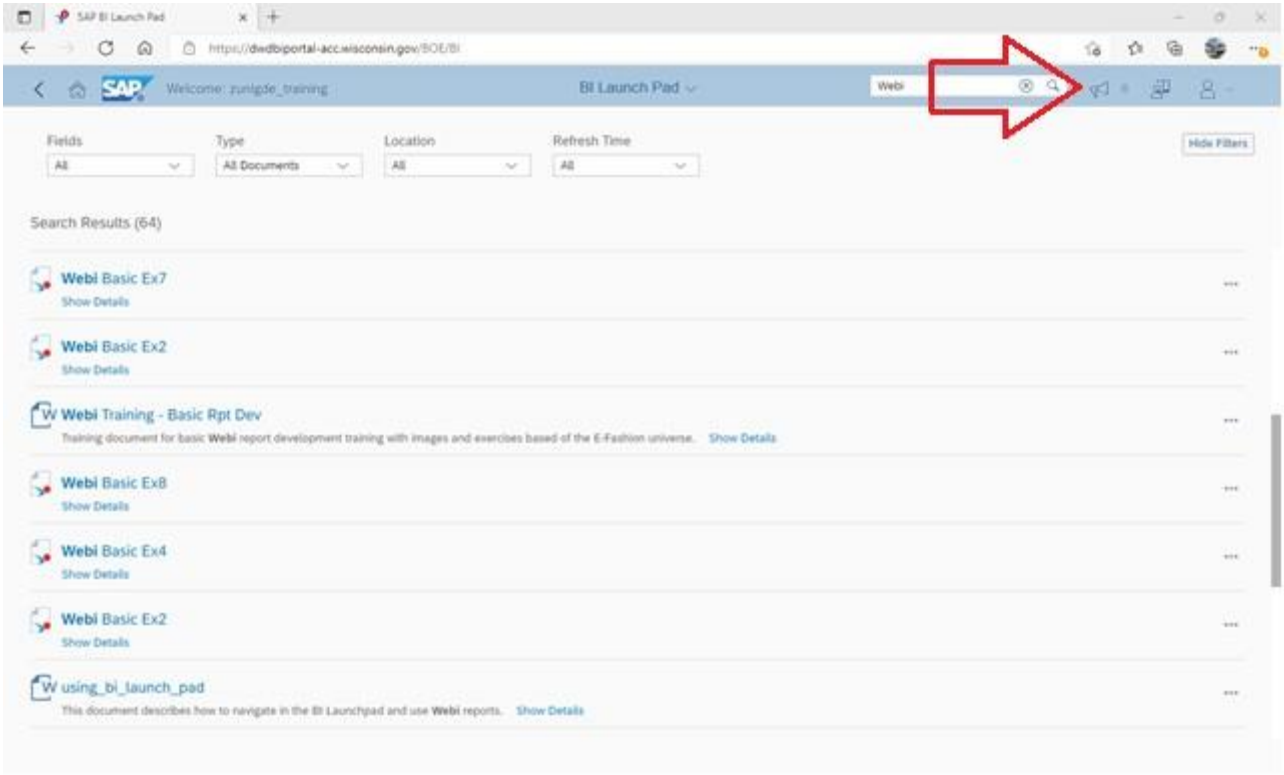


Once you get the search results you can further filter the results by editing the dropdown lists for Fields, Type, Location, and Refresh Time. From the results you can also open the document as well as perform all the actions you have permissions to via the ellipsis.



Notifications

Notifications sent within the system will appear in the upper-right of the BI Launchpad. You can access any active notifications via the bullhorn icon.

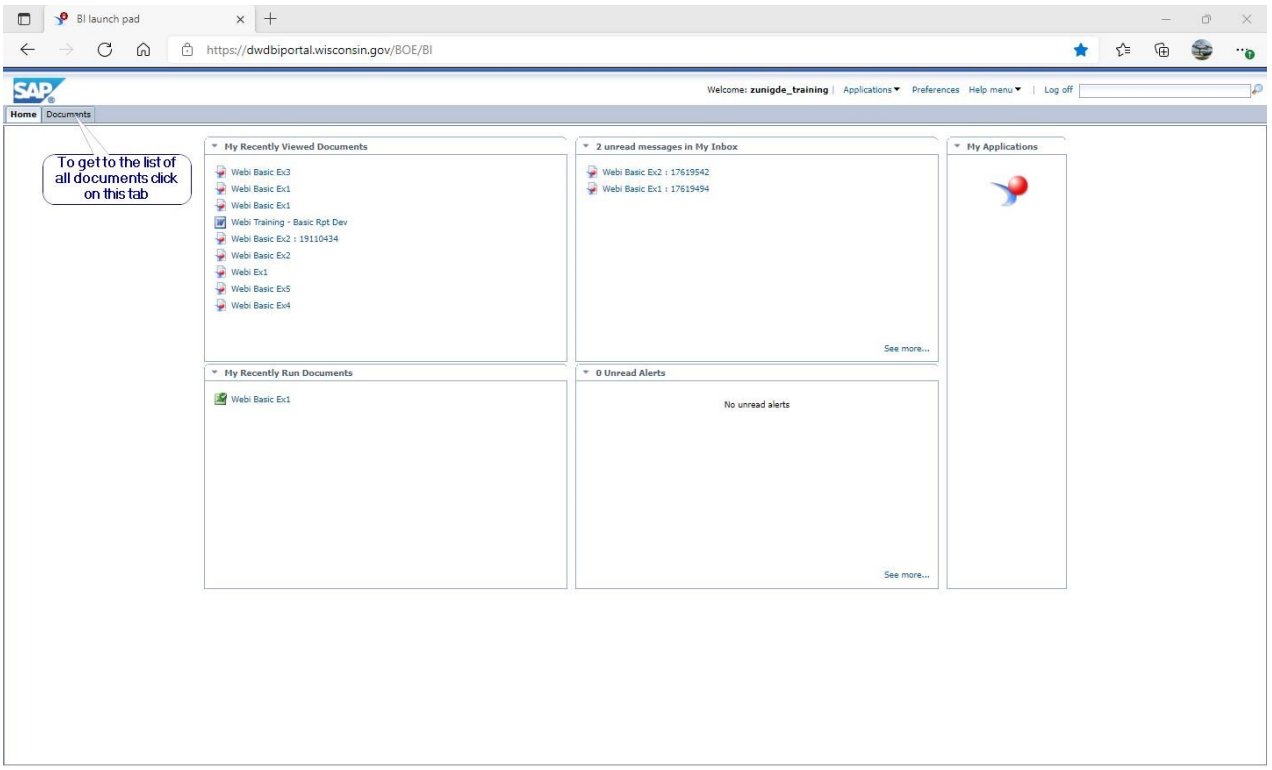


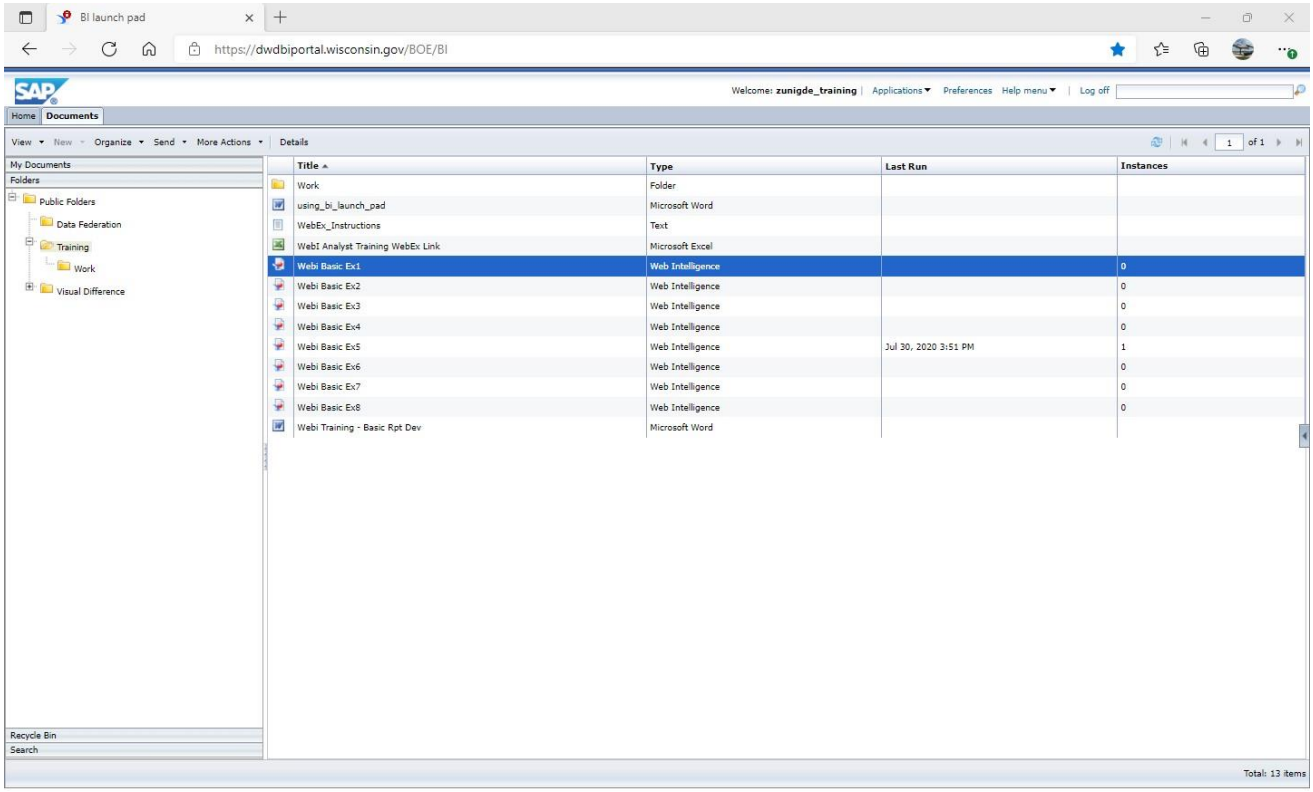
Folders and Viewing Reports

Folders

Classic View

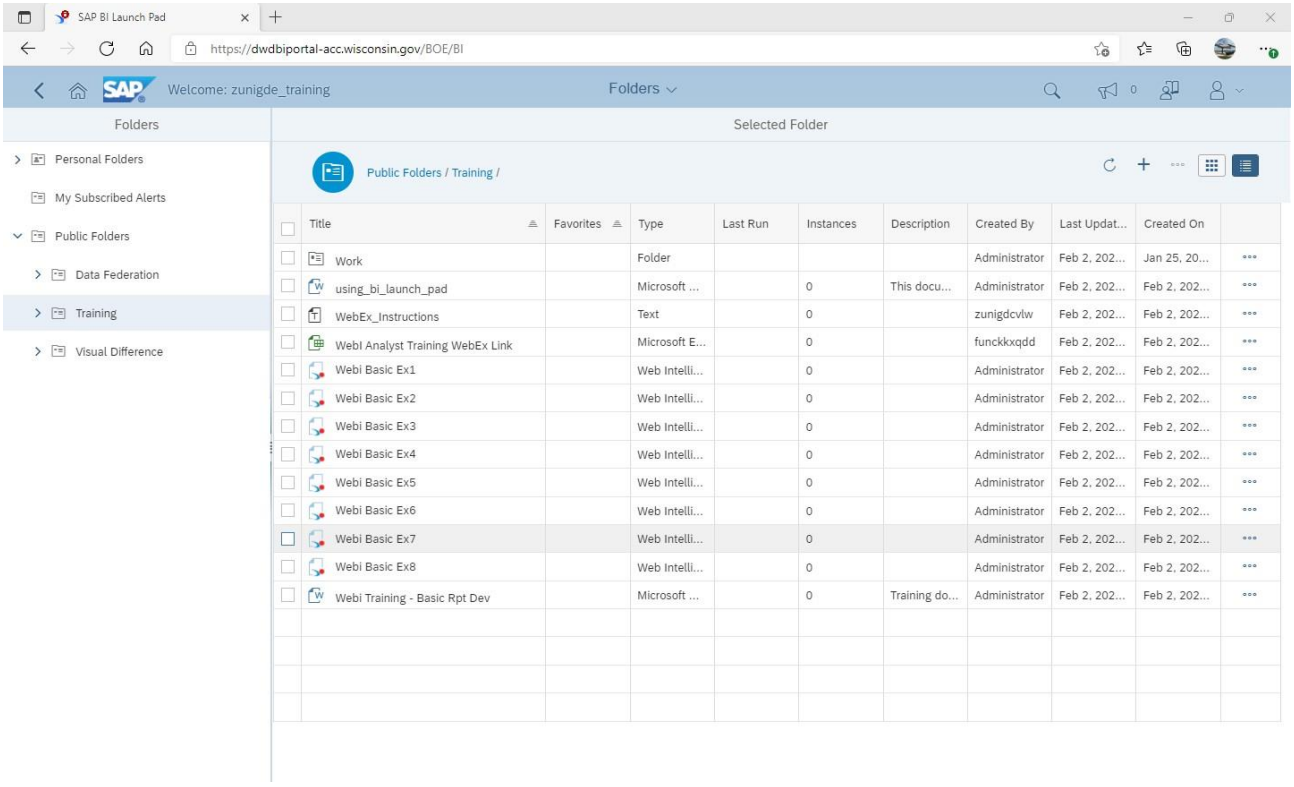
From the Classic Home Page, you navigate to the folders by clicking on the Documents tab.

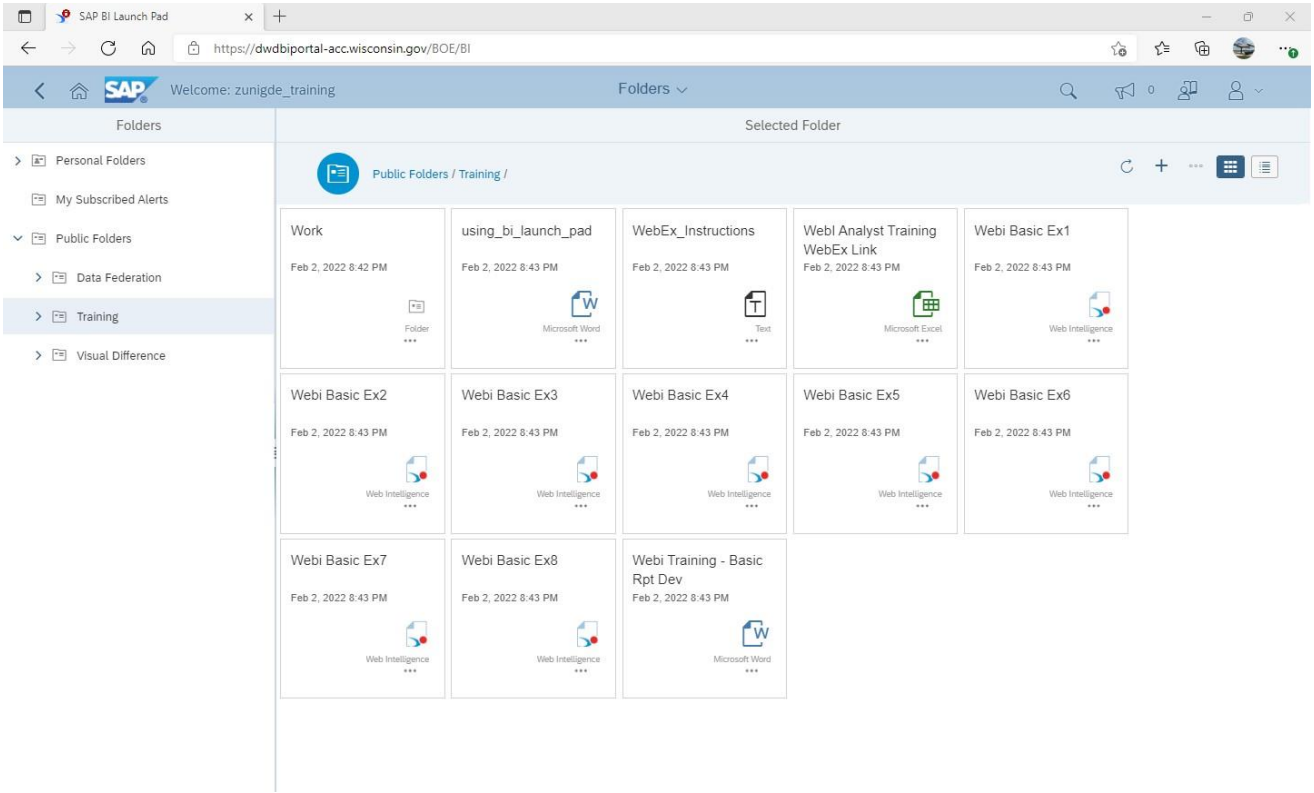




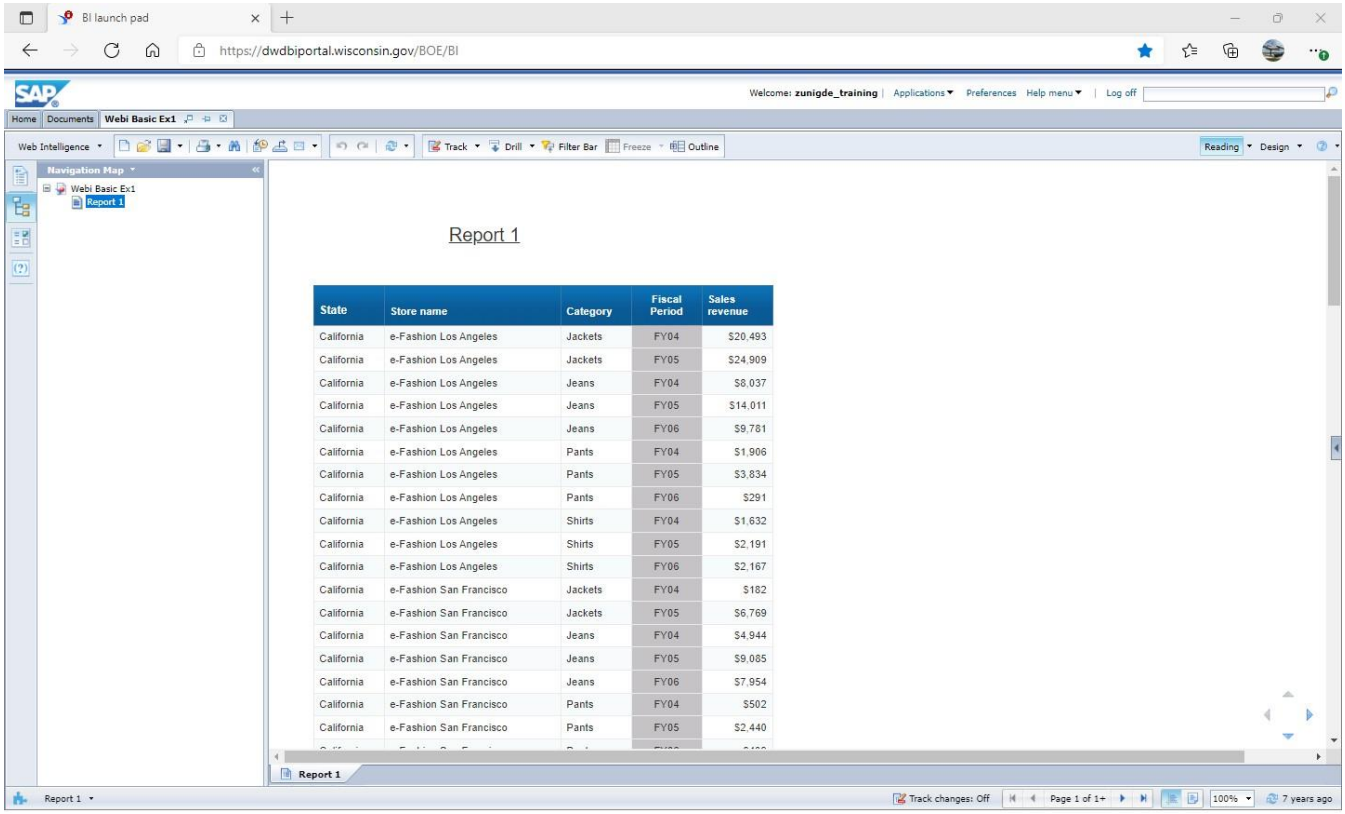
Fiorified View

In the new Fiorified environment, simply click on the Folders tile. This will give the list of both Personal and Public folders. From here the navigation is very similar to the classic design. You can also toggle between list and tile views.



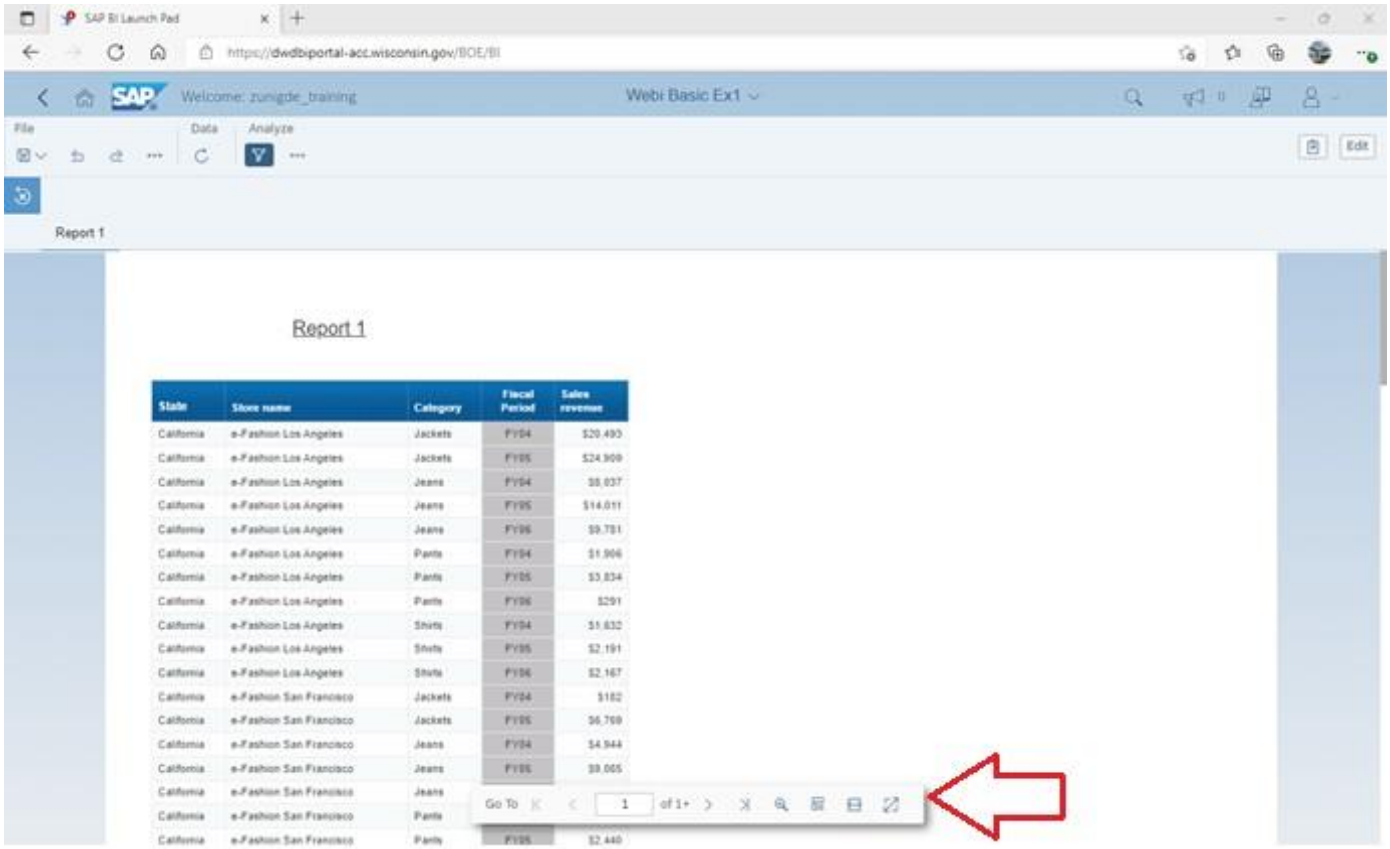


When opening a WebI document for viewing the interface is simplified & **the report tabs are now at the top.**

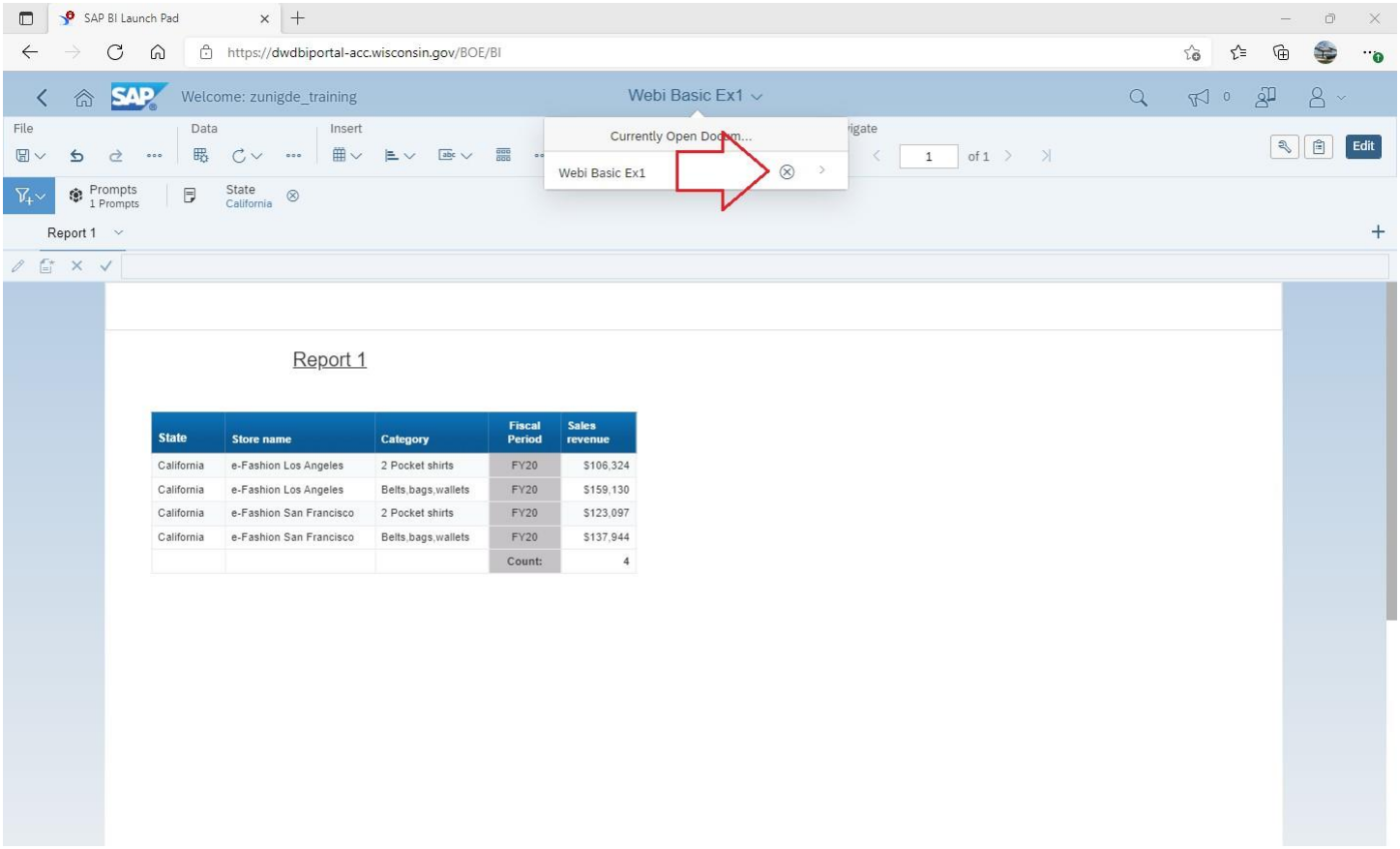


State	Store name	Category	Fiscal Period	Sales revenue
California	e-Fashion Los Angeles	Jackets	FY04	$20,493
California	e-Fashion Los Angeles	Jackets	FY05	$24,909
California	e-Fashion Los Angeles	Jeans	FY04	$8,037
California	e-Fashion Los Angeles	Jeans	FY05	$14,011
California	e-Fashion Los Angeles	Jeans	FY06	$9,781
California	e-Fashion Los Angeles	Pants	FY04	$1,906
California	e-Fashion Los Angeles	Pants	FY05	$3,834
California	e-Fashion Los Angeles	Pants	FY06	$291
California	e-Fashion Los Angeles	Shirts	FY04	$1,632
California	e-Fashion Los Angeles	Shirts	FY05	$2,191
California	e-Fashion Los Angeles	Shirts	FY06	$2,167
California	e-Fashion San Francisco	Jackets	FY04	$182
California	e-Fashion San Francisco	Jackets	FY05	$6,769
California	e-Fashion San Francisco	Jeans	FY04	$4,944
California	e-Fashion San Francisco	Jeans	FY05	$9,085
California	e-Fashion San Francisco	Jeans	FY06	$7,954
California	e-Fashion San Francisco	Pants	FY04	$502
California	e-Fashion San Francisco	Pants	FY05	$2,440

There is a hidden report navigation bar below that you may need to hover over the bottom of the report to see. You can navigate between pages, zoom, show print layout, fit it to width, or fit to page.



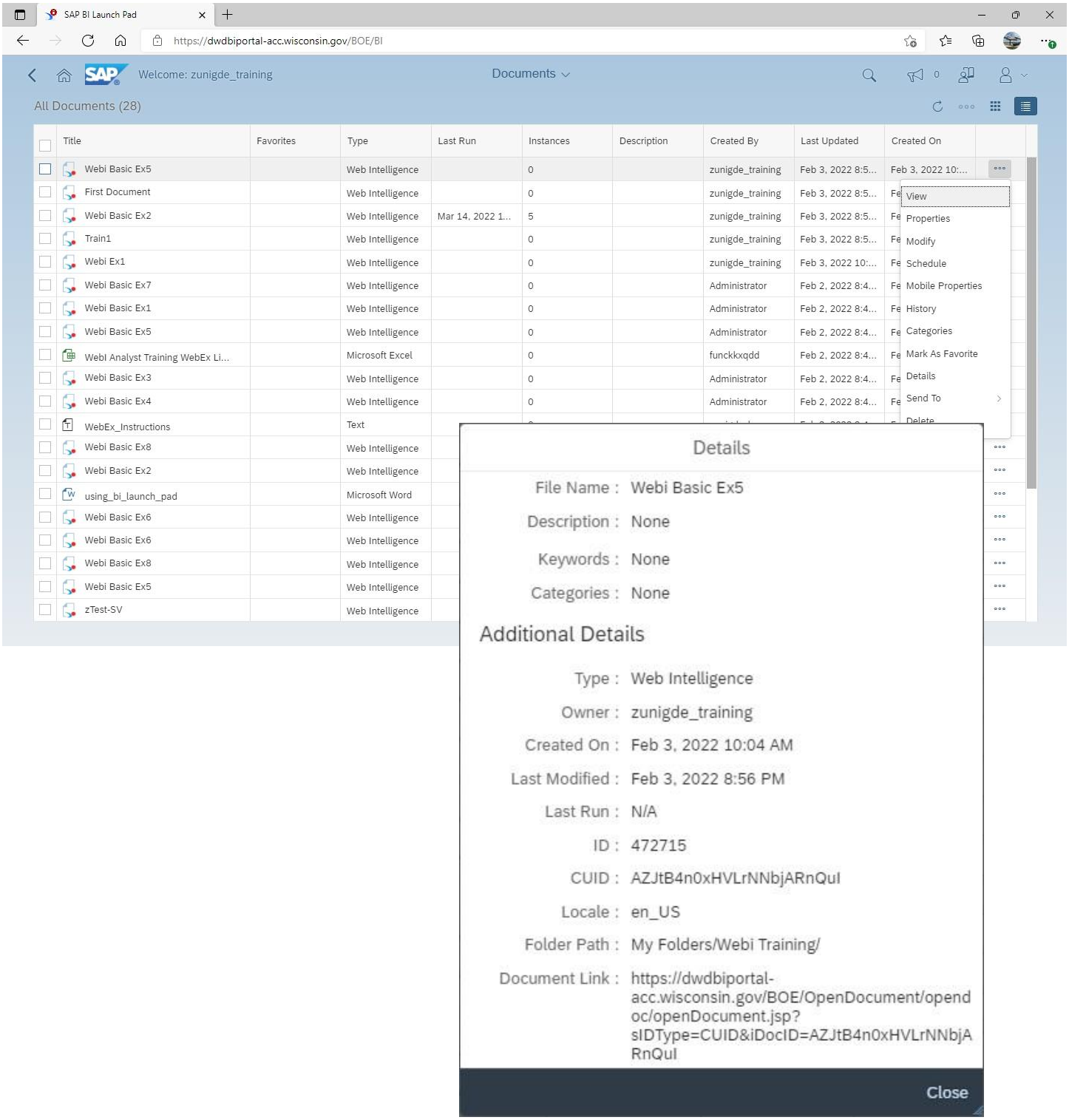
Closing a report in the new Fiorified BI Launchpad is now controlled by the menu at the top of the BI Launchpad page. This lists all currently open documents. To close a particular report click the X button next to the report you want to close. Navigating back to home page does not close a report.



Documents and Recycle Bin

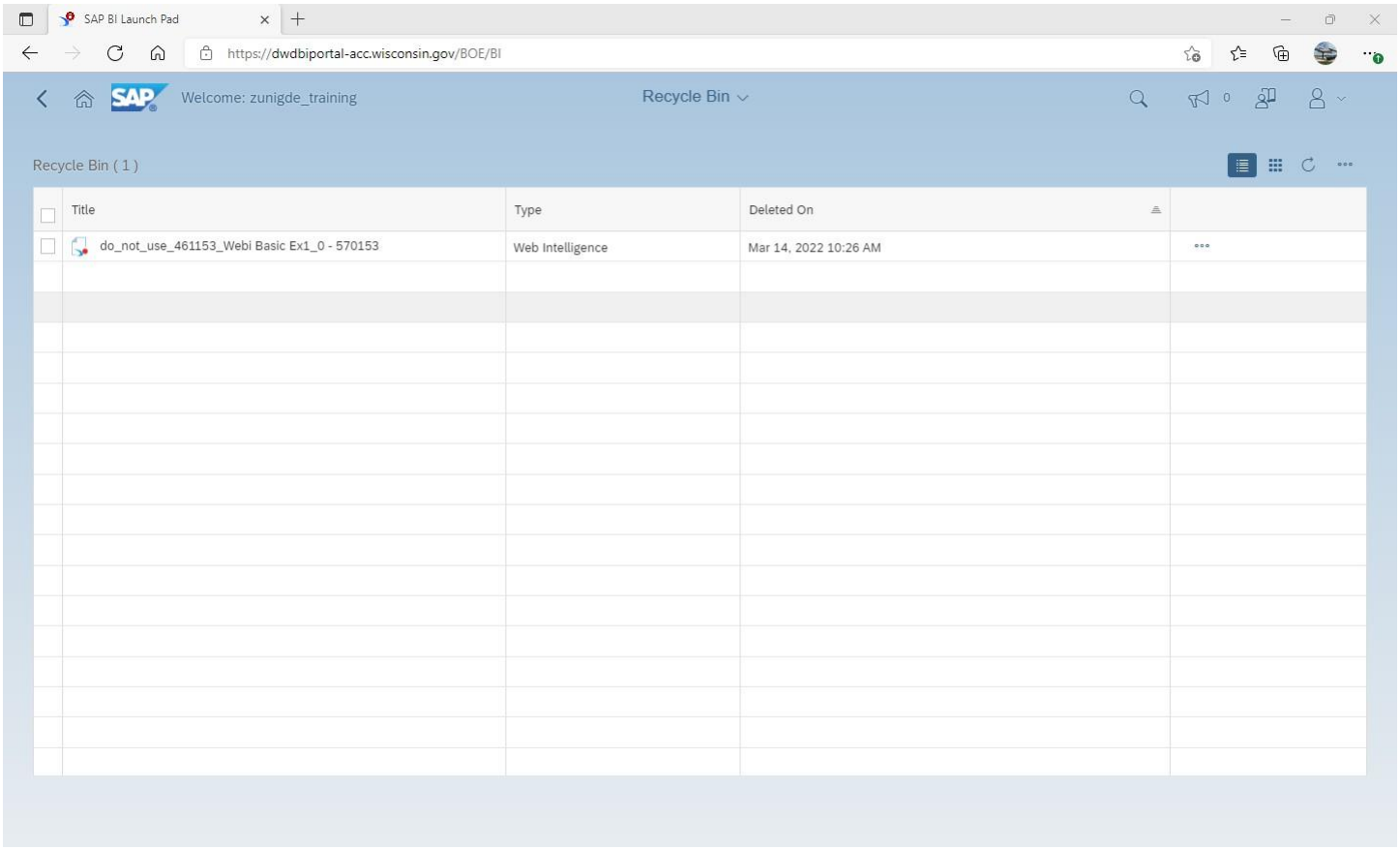
Documents Tile

The Documents tile takes you to a list of documents that you have access to. Depending on your access this list may be extensive and the folder path is not evident so if you have the same report name in multiple folders you have to click on the ellipsis and view the details. The details also have a link that you can copy and share which takes the user directly to the report.

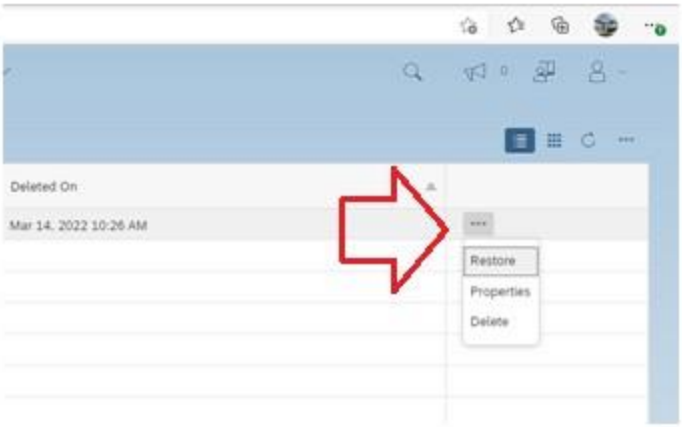


Recycle Bin Tile

The recycle bin is now available to each user from the home page. This lists all the objects that the user has deleted. It works similar to Windows recycle bin in that you can restore or permanently delete objects. The recycle bin was available in previous versions but only accessible by administrators. The recycle bin like the folder listing is available in list and time modes.



By clicking the ellipsis on an object you get the options to **Restore**, view **Properties**, or permanently **Delete** the object.

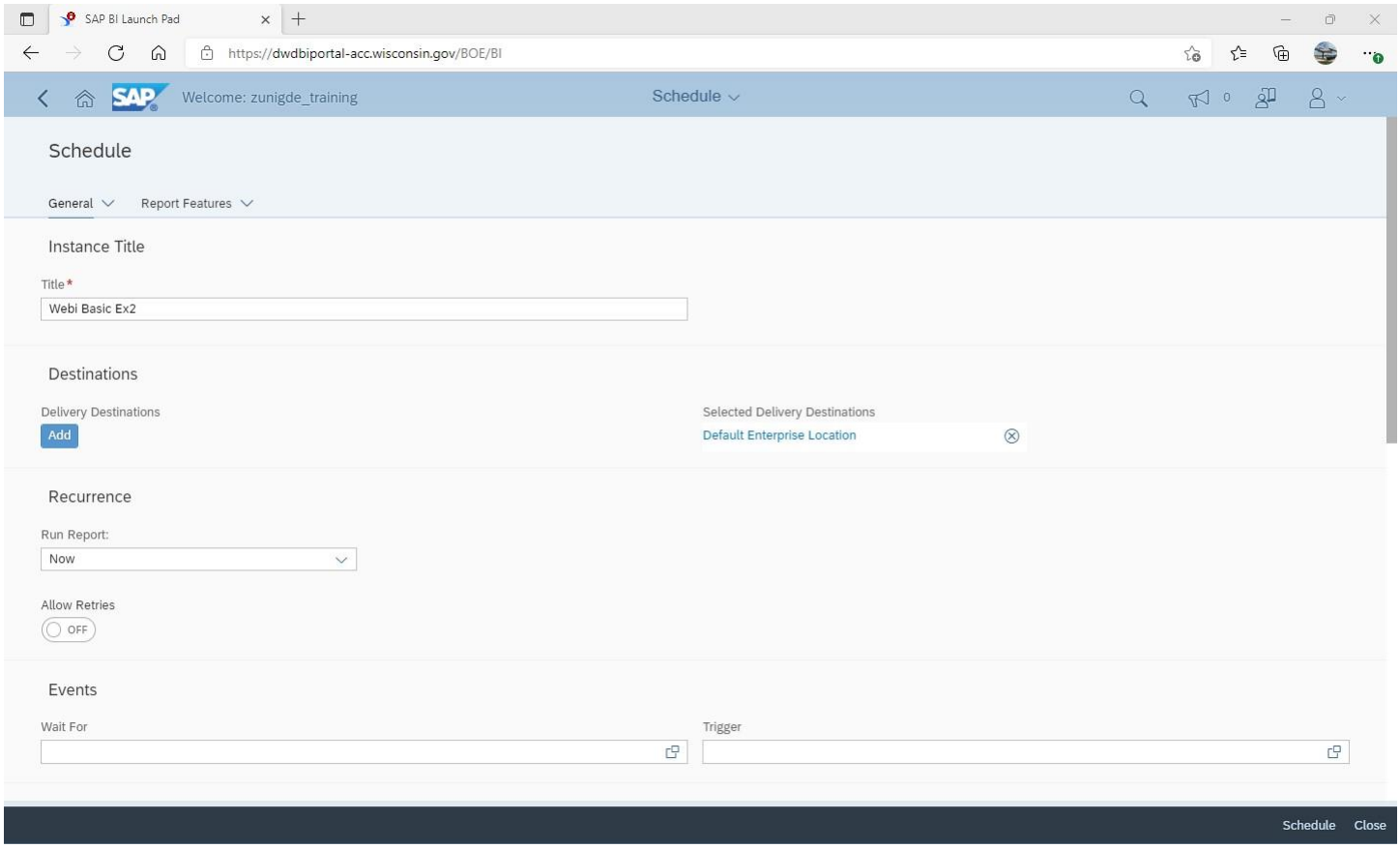


Scheduling

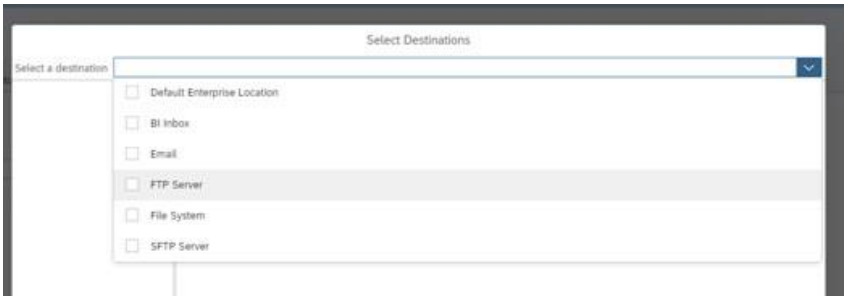
Scheduling

The new Fiorified BI Launchpad has implemented a few new features in the scheduling area, some were only previously available in the CMC and some are new like scheduling to multiple destinations within 1 schedule.

You create a schedule the same way in the new environment as you did in the past but the interface is completely different.

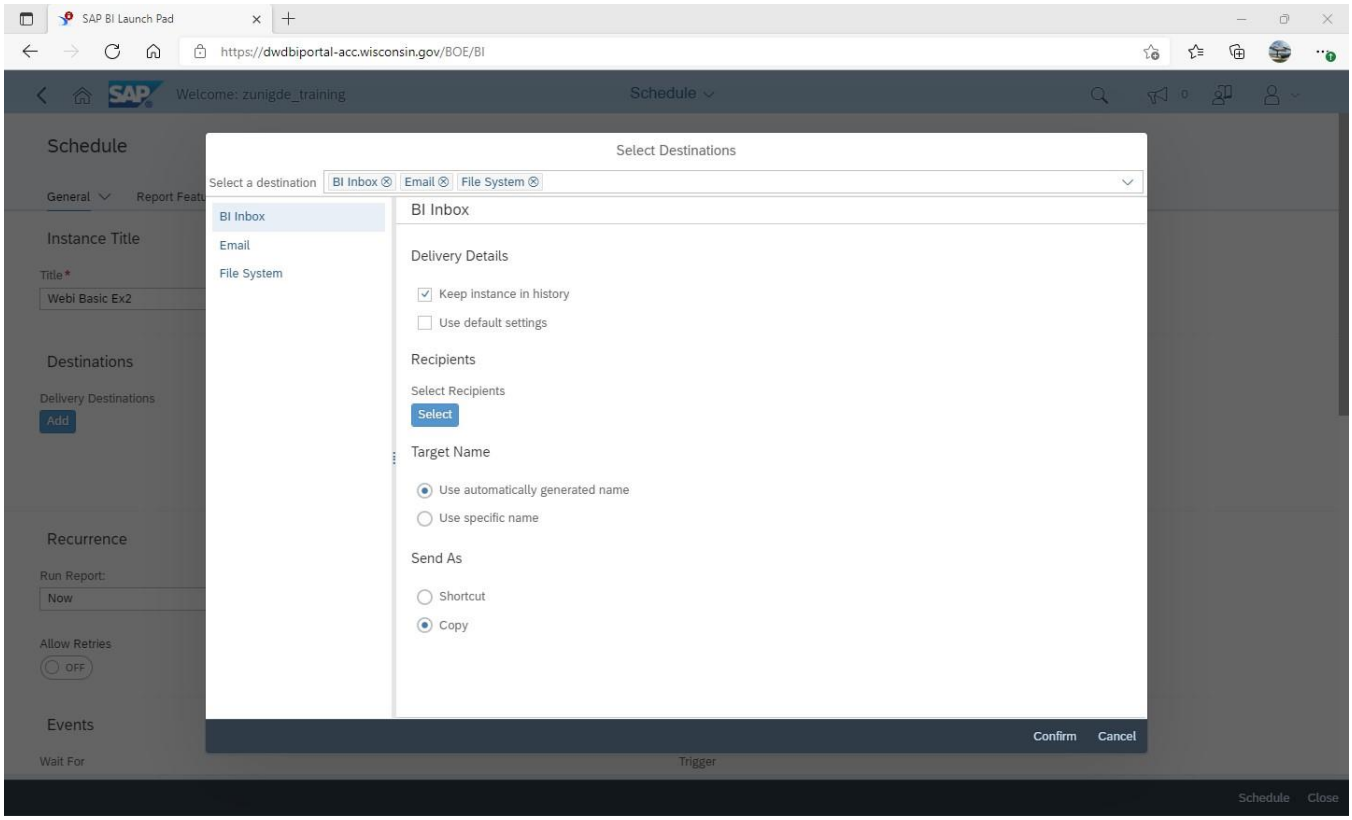


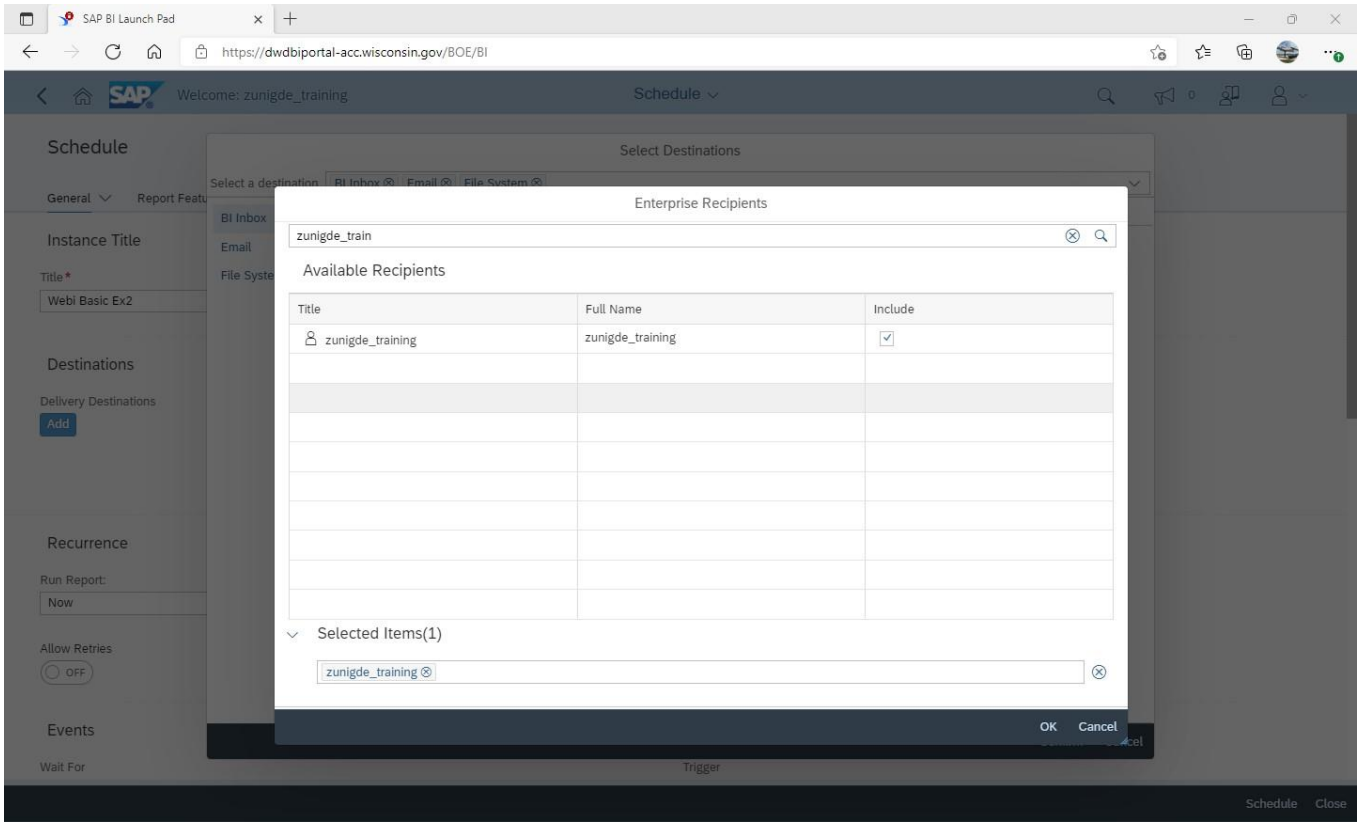
By clicking on the Add button you are now able to select one or more destinations. This will add the destination type to the schedule. Remember to remove the Default Enterprise Location. The BI Inbox options are the same as the previous version. With each destination you can choose to keep the instance in history. Unselecting this will not save each instance and will save space on the system.



BI Inbox Destination

Once you have selected the destinations they will be listed in this dialog and you can access the settings from the left panel. If you selected multiple destinations you will see all the destination types and can navigate between them to set individual properties.

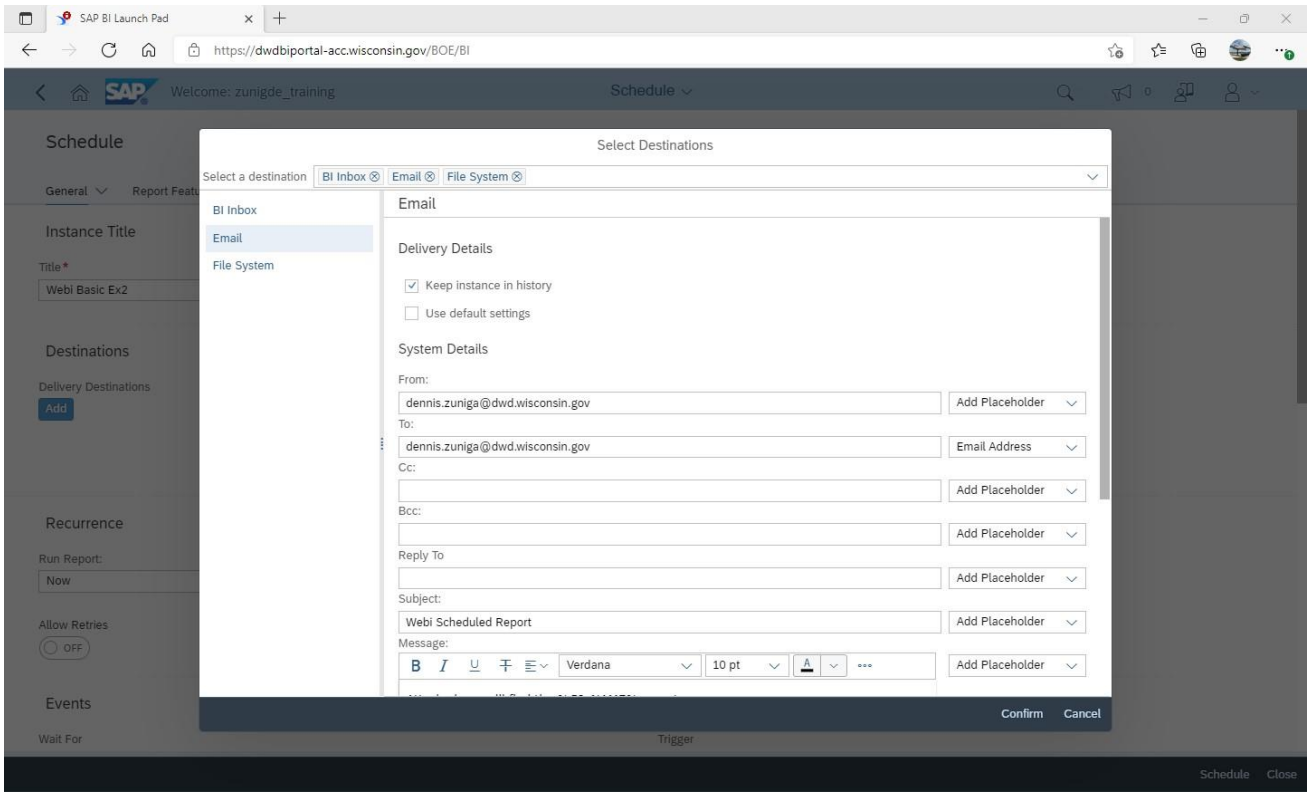


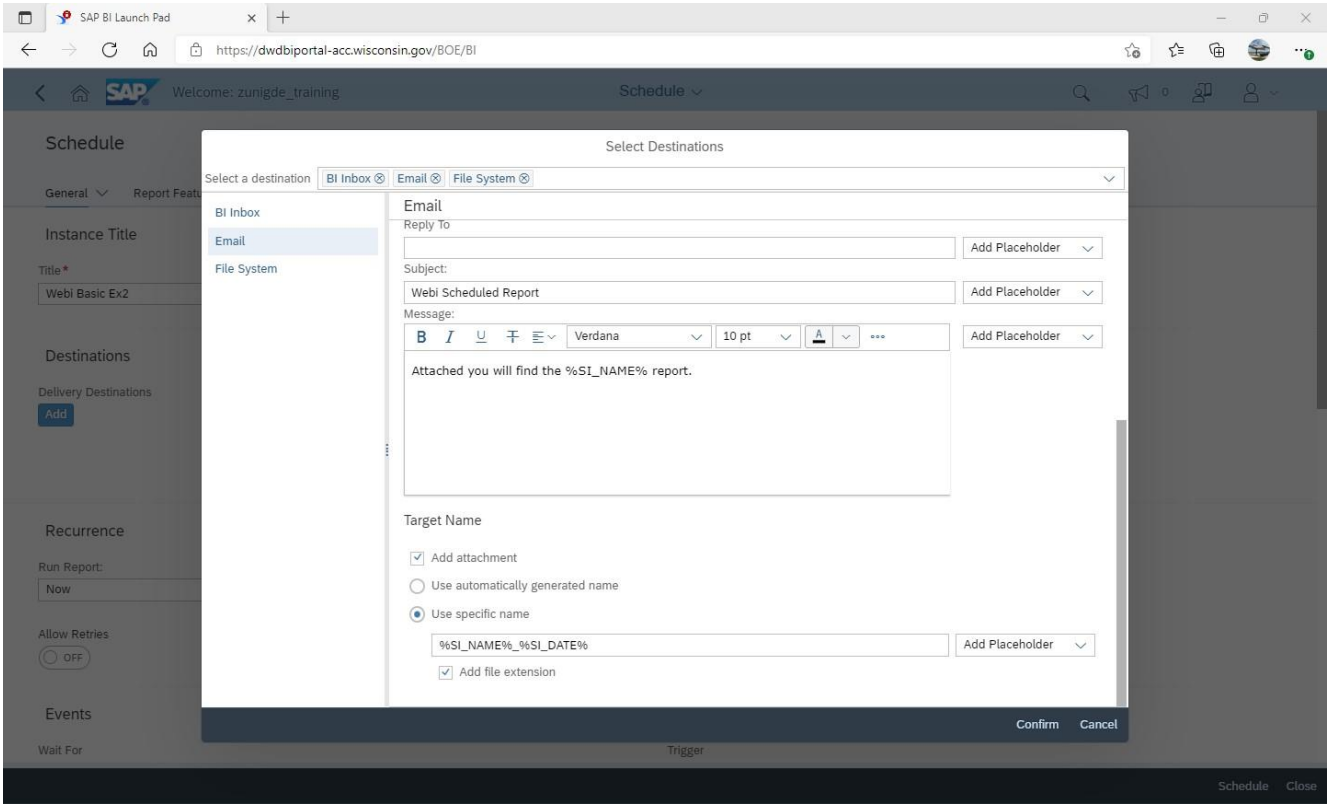


Email Destination

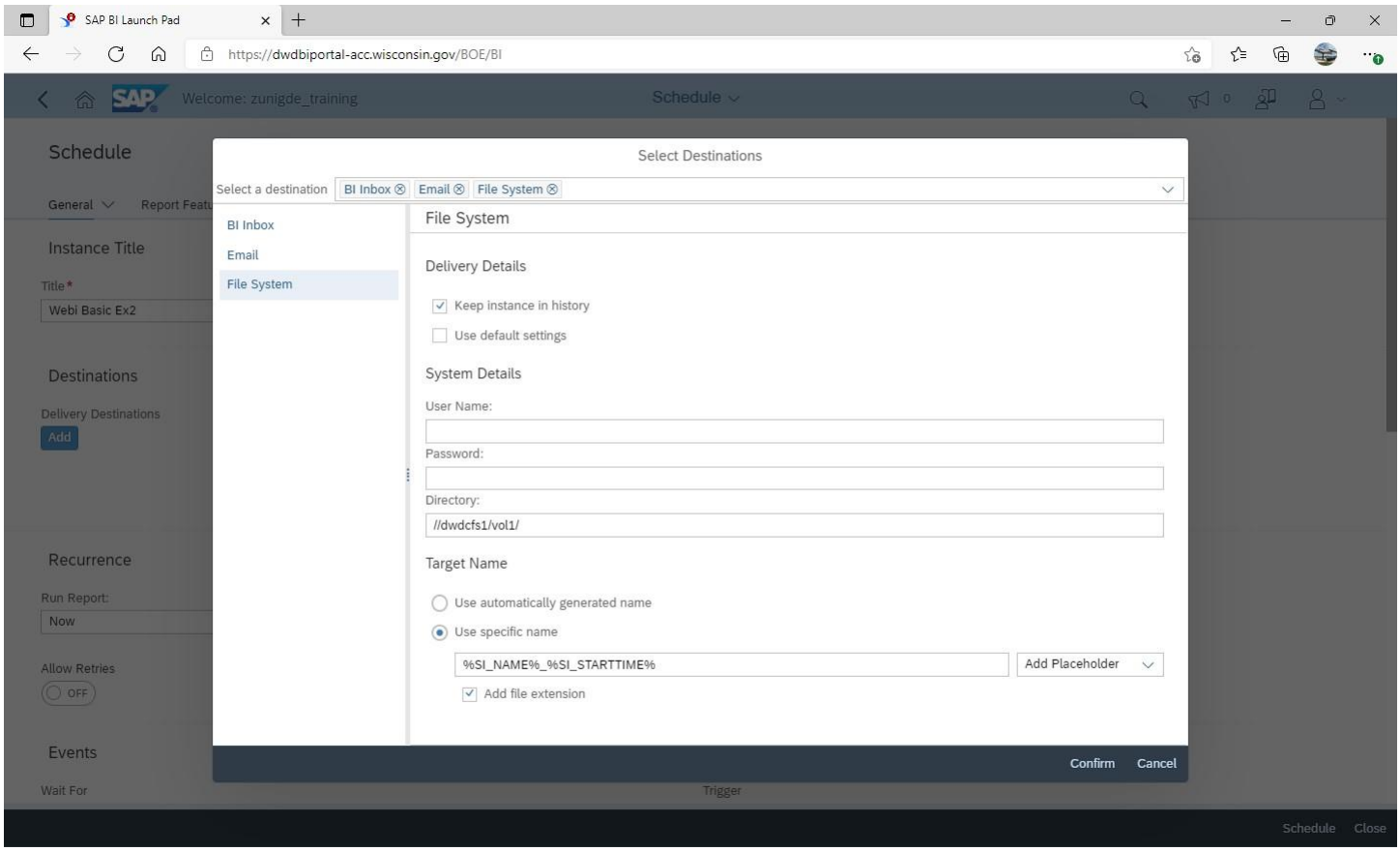
Below are the settings for email destinations. It is very similar to the classic BI Launchpad settings, however, there is a new field Reply To that has been added. The Reply To is the email address you want any replies to go

to. So if someone were to reply to the email generated by the schedule it would send the reply to whom you designate.



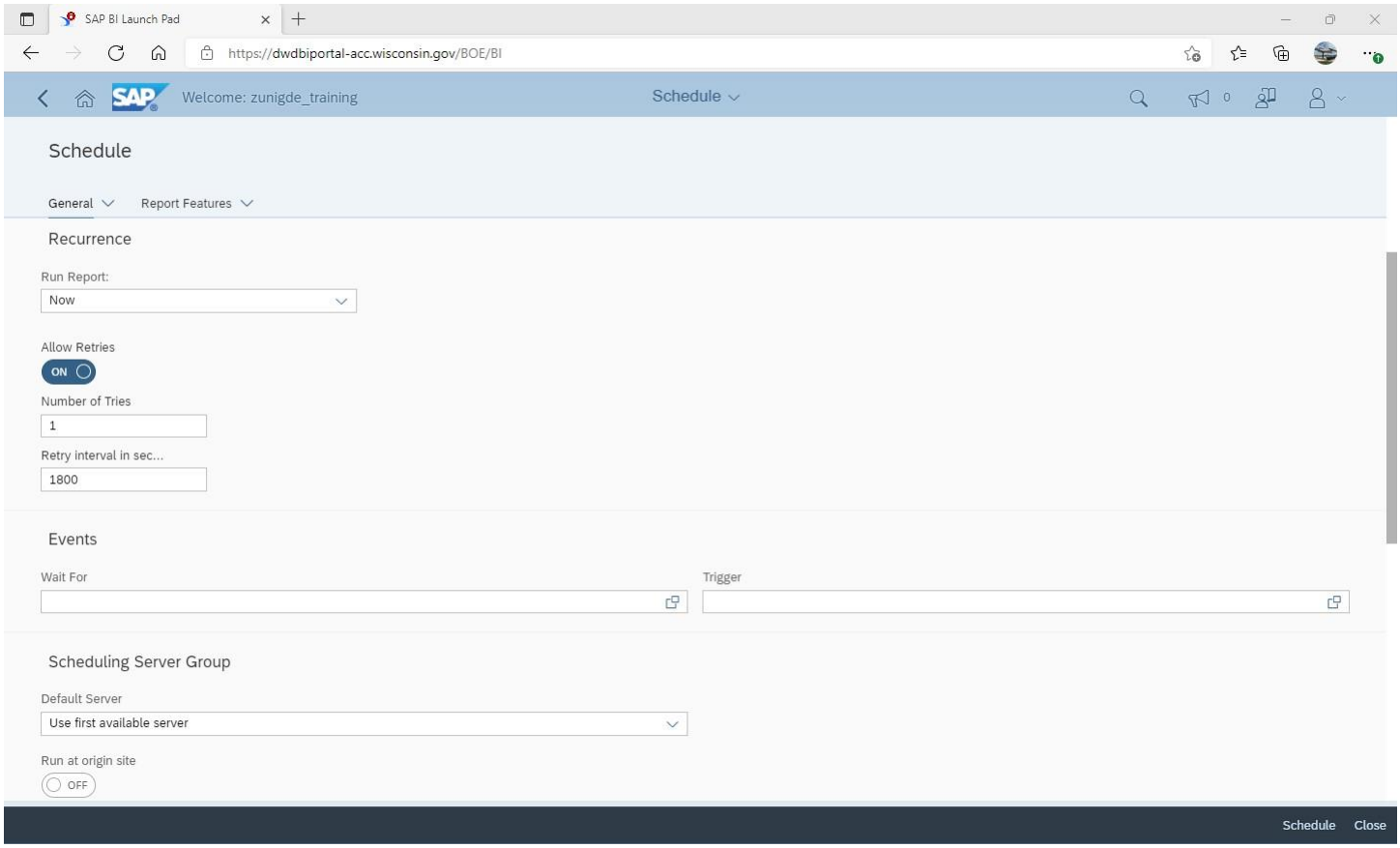


File Server Destination



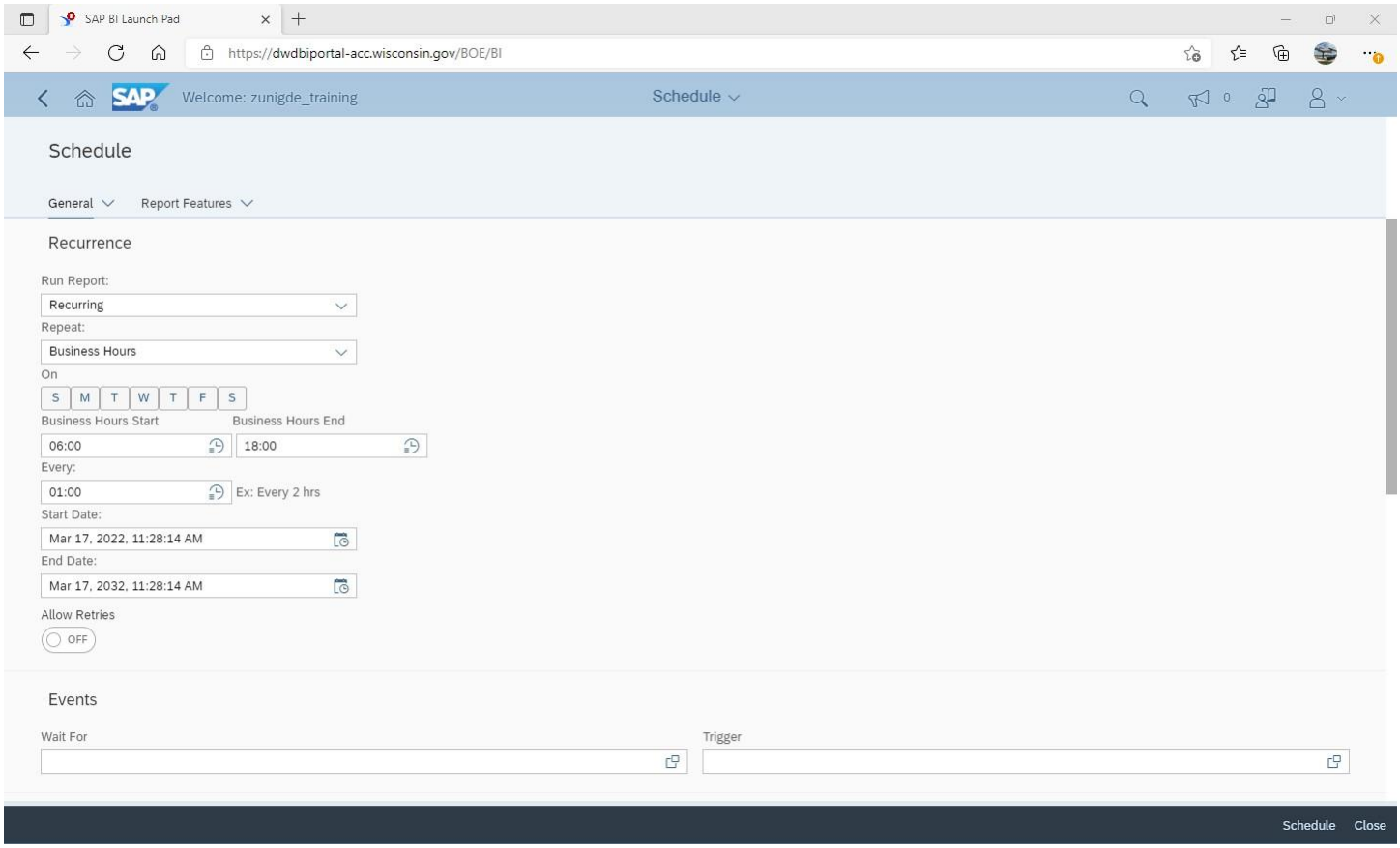
Recurrence

Under the Recurrence section, there is an option now for retries which was only available in the CMC in the previous version. There is also a new type of recurrence called Business Hours.



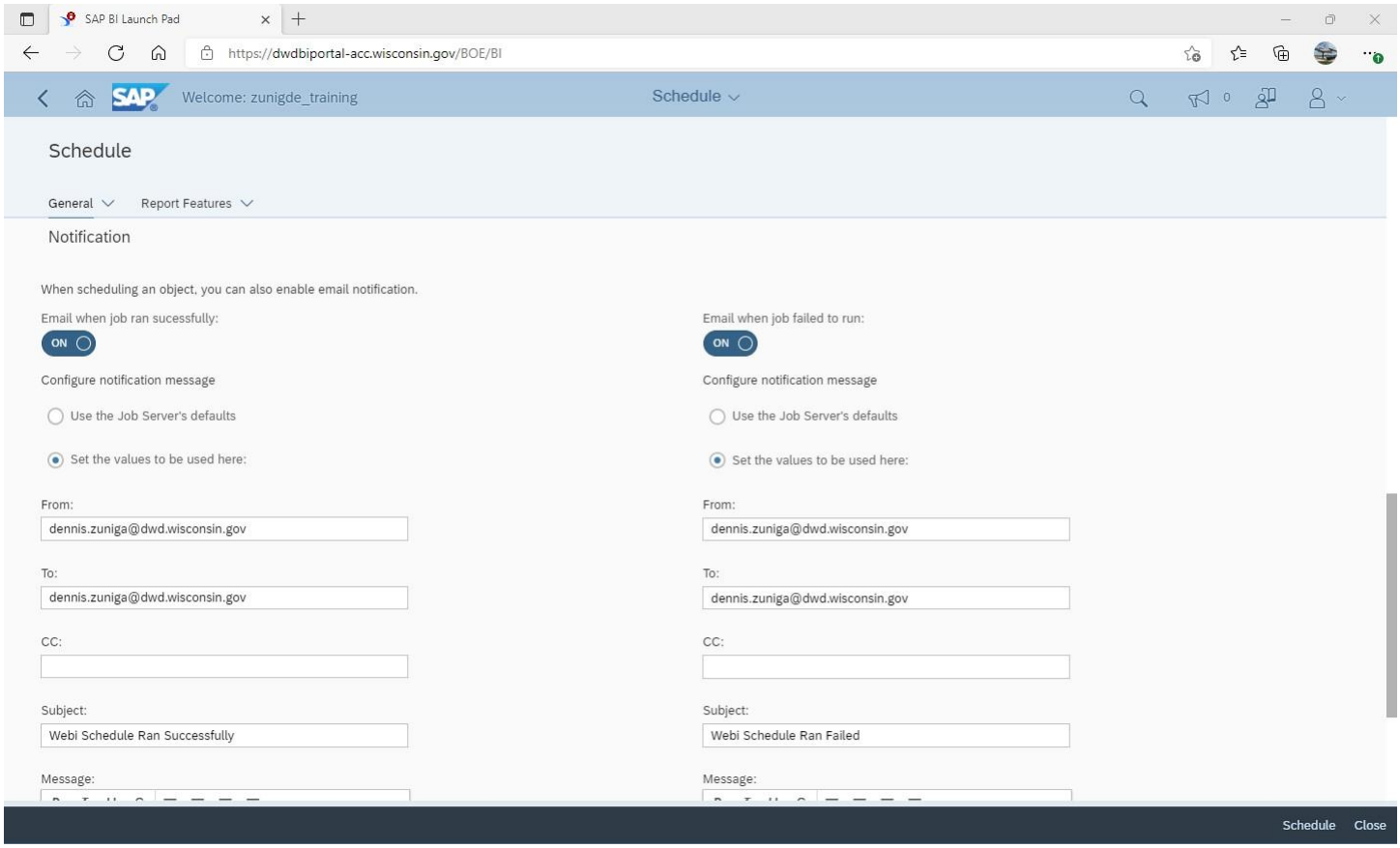
Business Hours

There is a new scheduling feature introduced in this version that allows for periodic schedules within the hours you set as business hours.



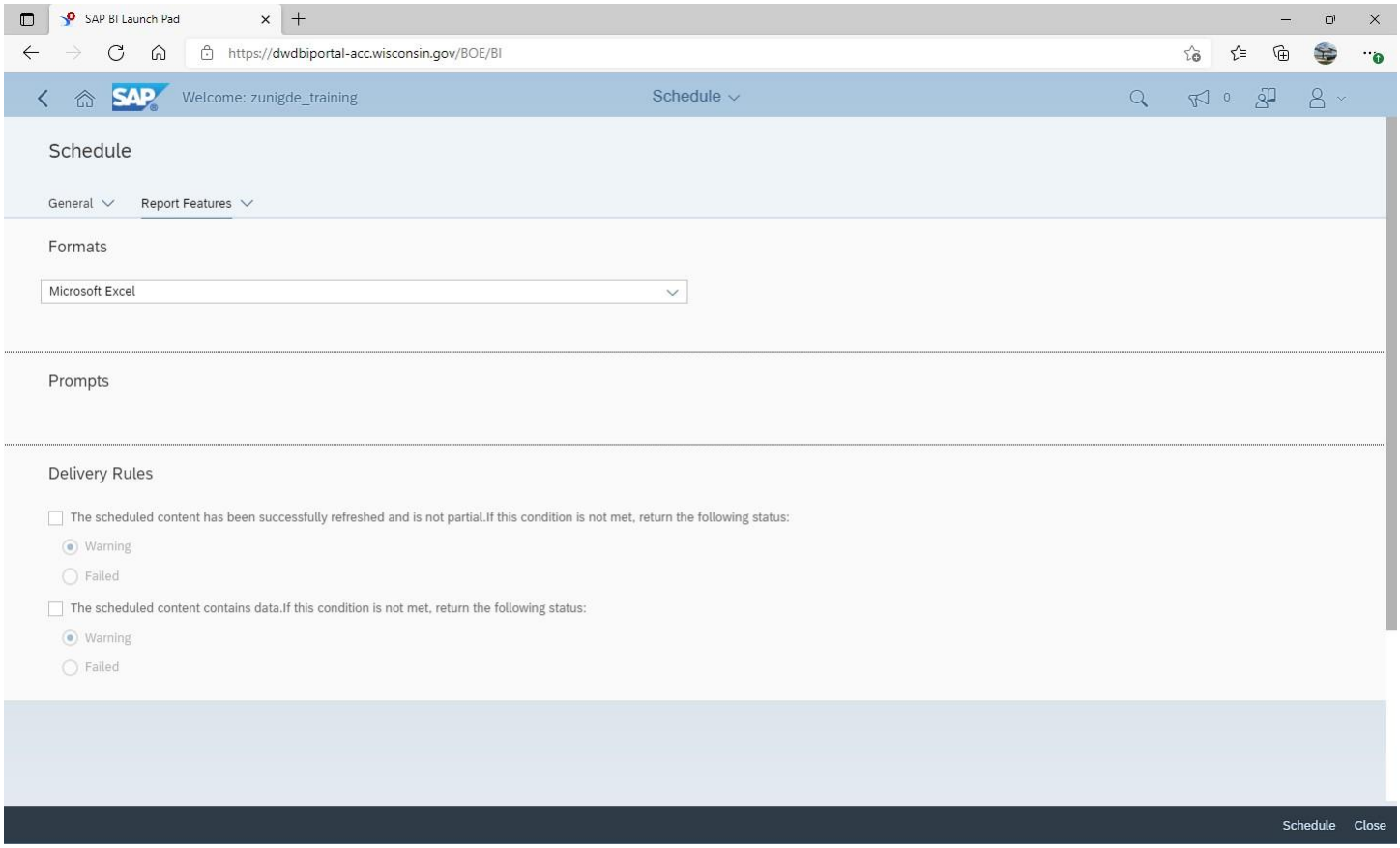
Notifications

The BI Launchpad now has notifications for scheduling whereas in the past this was only available in the CMC. With this feature you can set notifications on schedule success and/or failure.



Formats, Prompts, and Delivery Rules

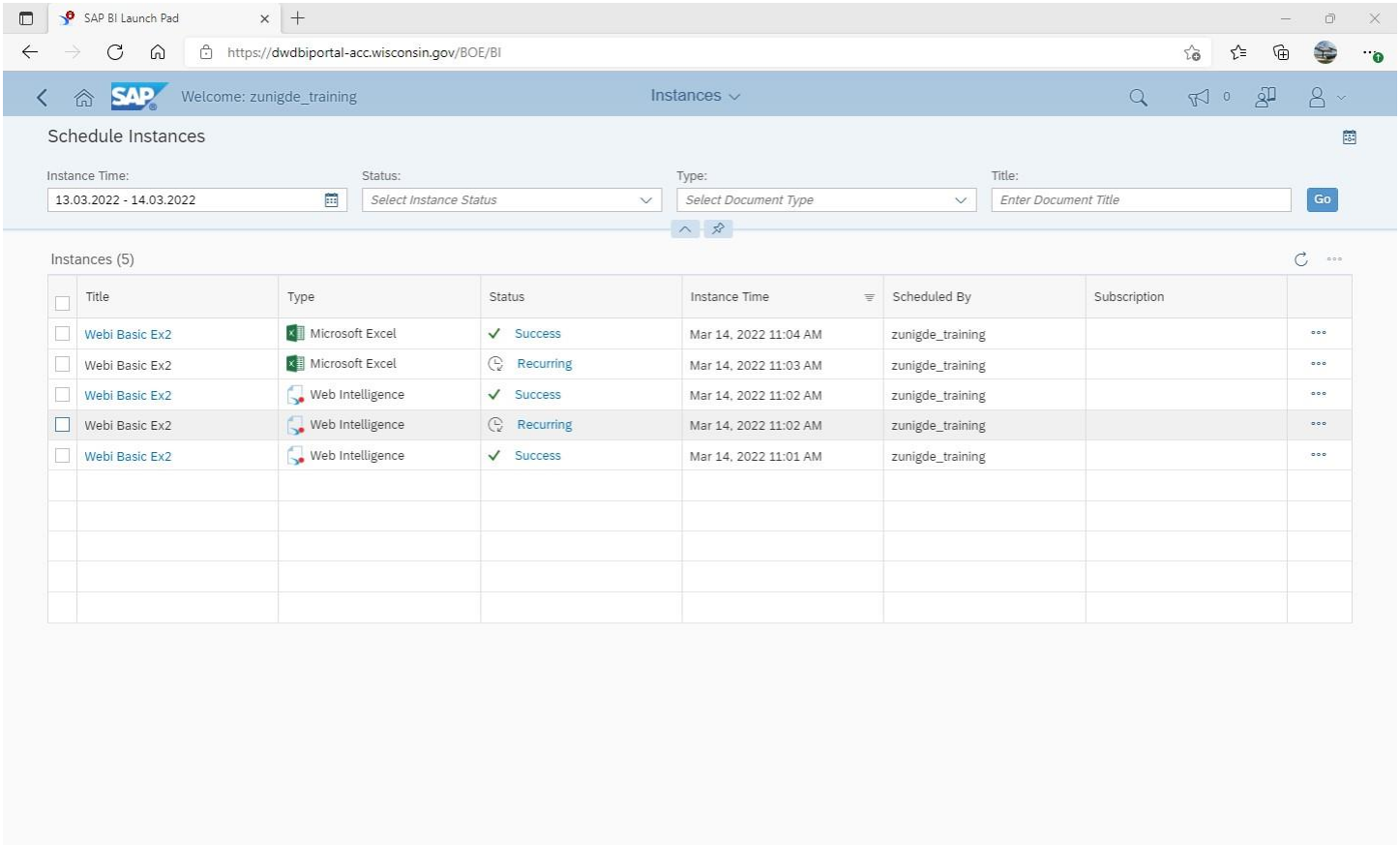
In this version, you set the format of the scheduled report, any prompts, and delivery rules in the Report Features menu.



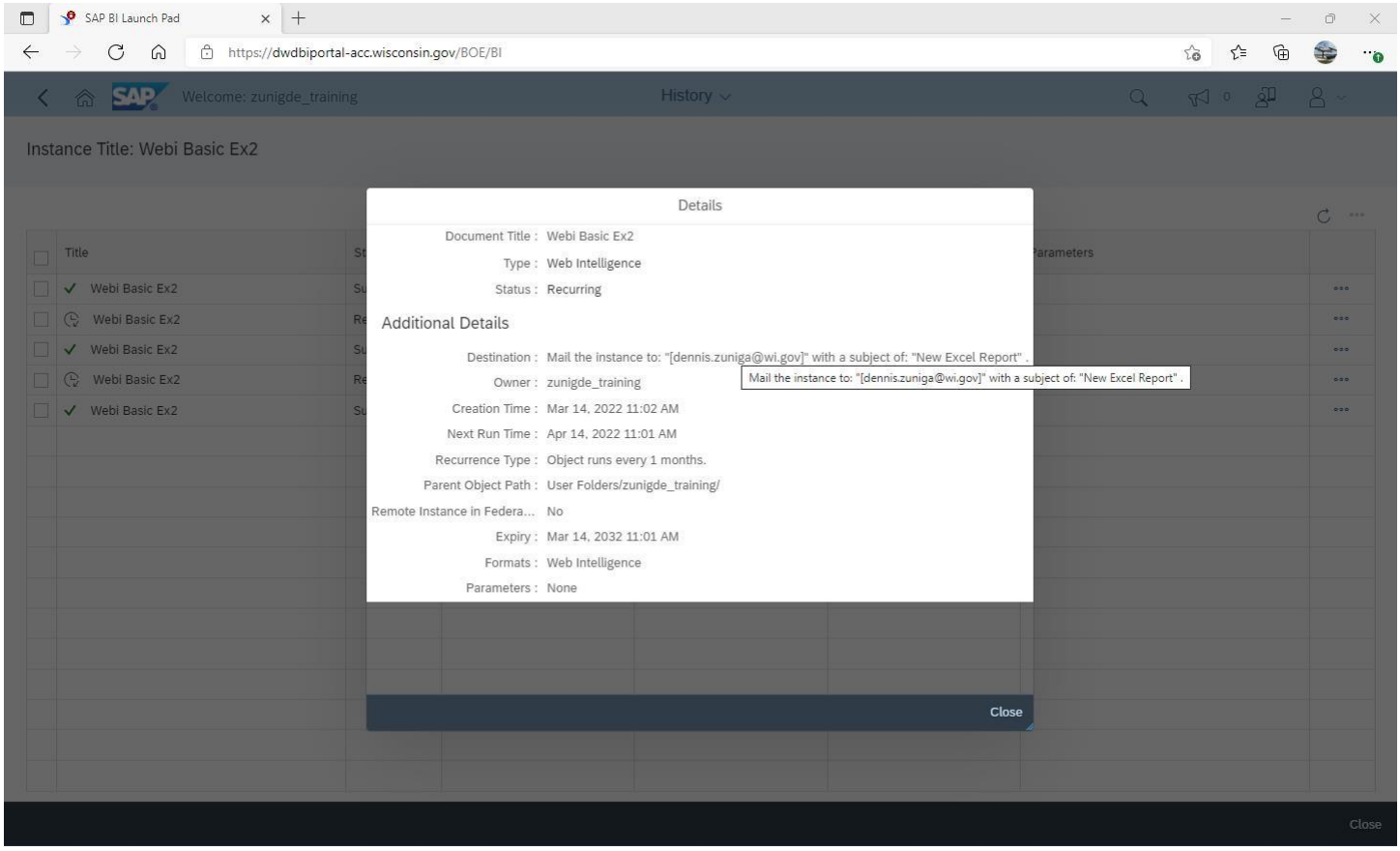
Instances

Instances

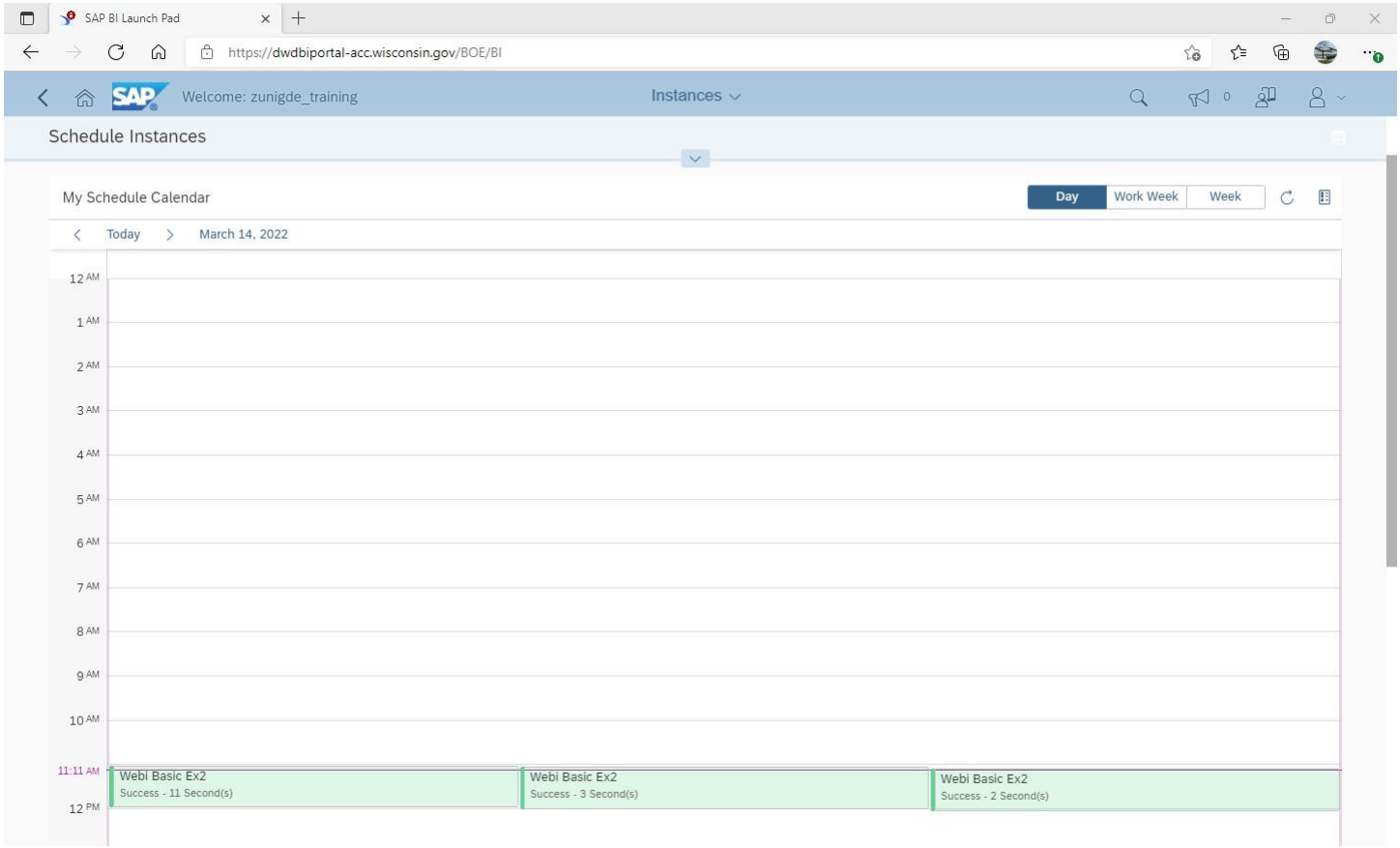
Scheduled instances are now available in the new Fiorified BI Launchpad on the home page. In the past, this was only available in the CMC. It lists the users scheduled reports and statuses. On this page you can manage all your scheduled instances.



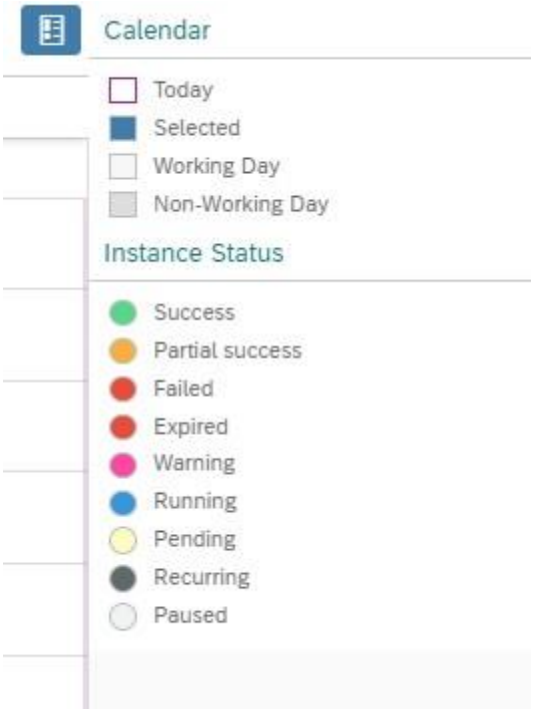
By clicking on a recurring instance's status you can view the details about the schedule.



You can also view the instances in a calendar view by clicking the calendar icon.



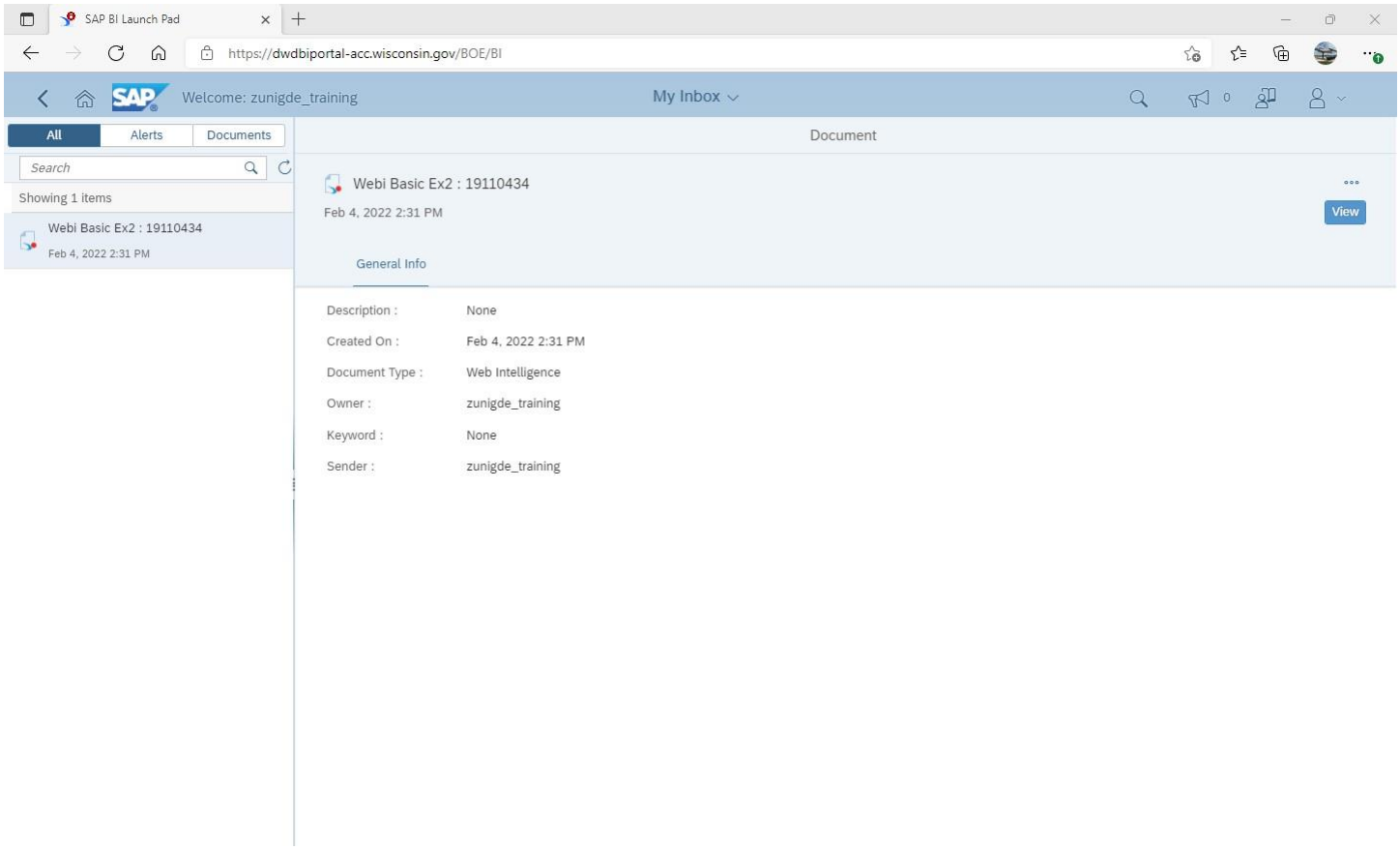
There is also a legend that explains the statuses of each scheduled report.



BI Inbox

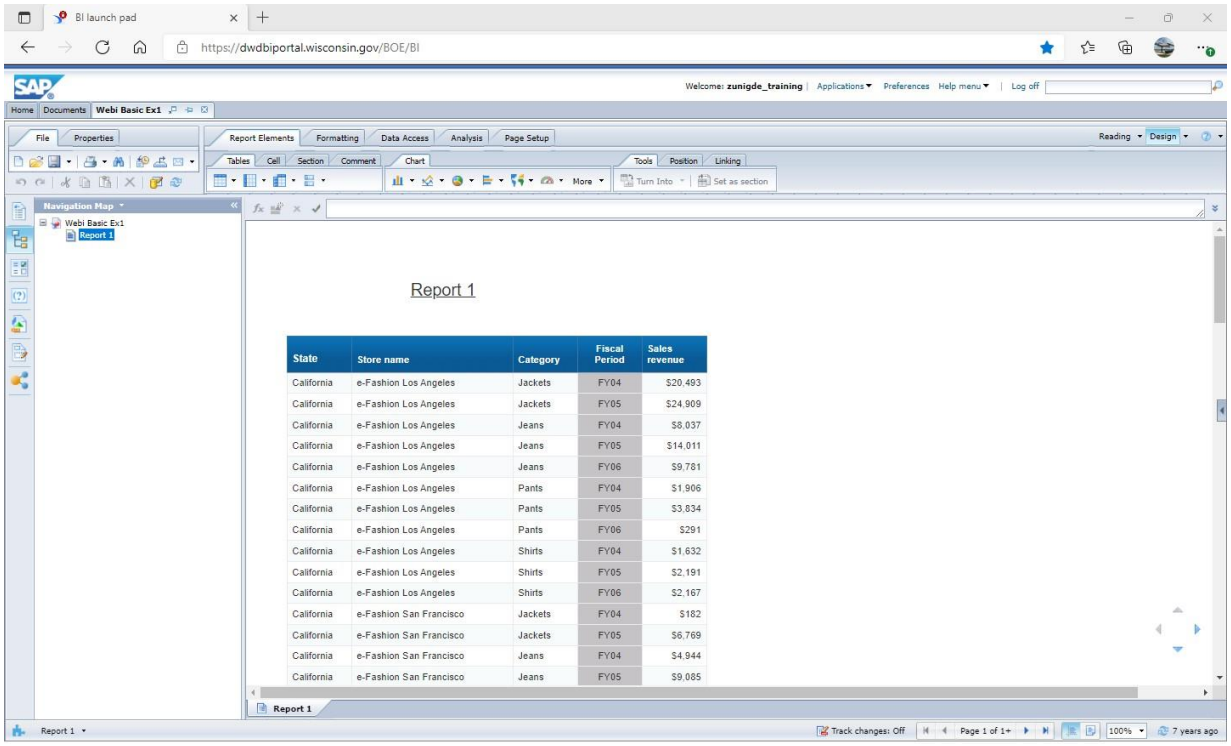
BI Inbox

In the new Fiorified BI Launchpad the BI Inbox has its own tile on the home page. You will see the list of all reports that have been sent to you via the BI Inbox as well as being able to view and manage these documents.

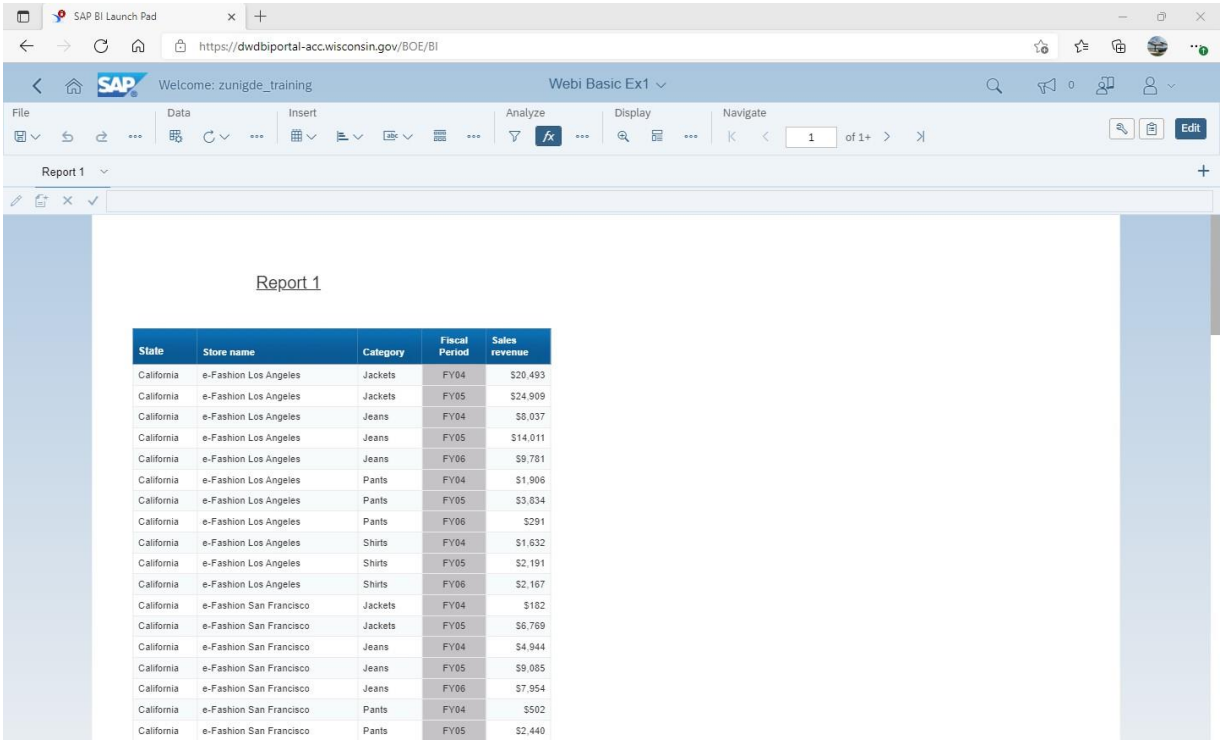


Editing Reports

In classic WebI, once you have a document open you have two main viewing modes, Reading and Design. You need to select Design mode to edit the report. The properties of objects are located in tabs at the top and along the left side are things such as Available Objects, Navigation Map, Input Controls, etc.

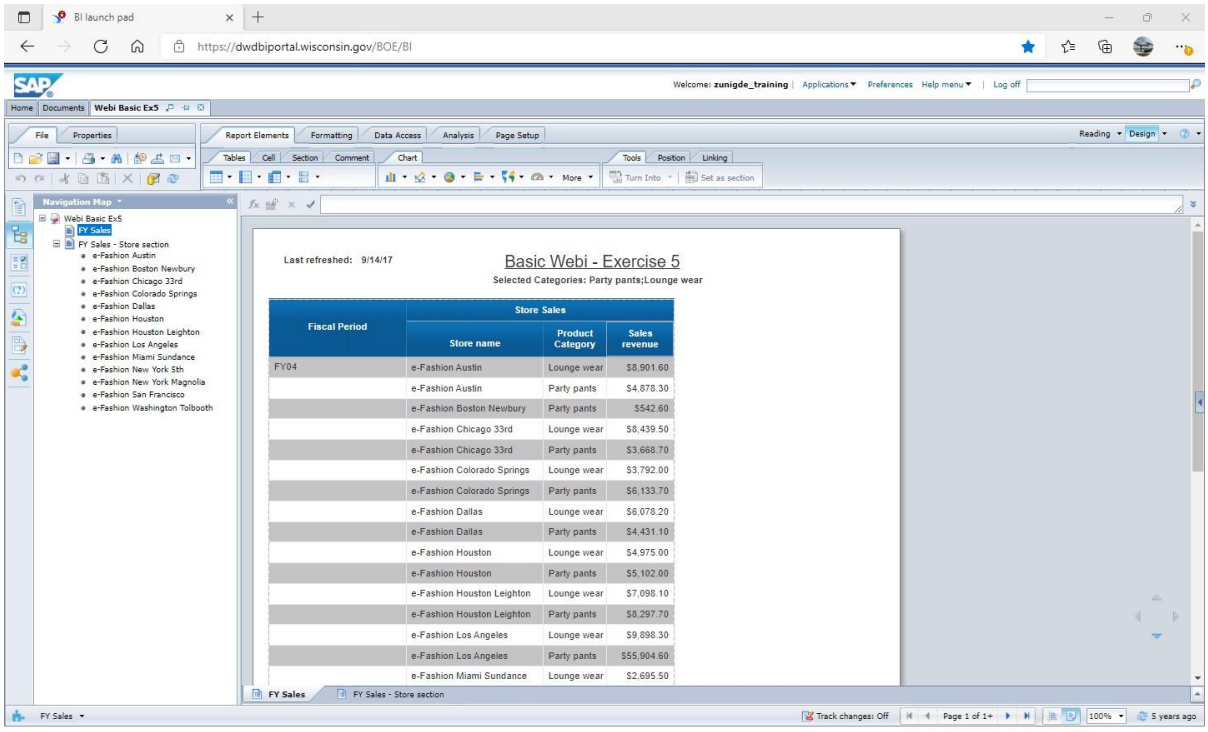


In the new Fiorified WebI, to edit a report once you have it open for viewing, simply click on the Edit icon. The Design Mode and Reading mode are no longer options as you can toggle between viewing and editing with a single click. The interface is much simplified as there is one single toolbar with limited options for the most common actions.

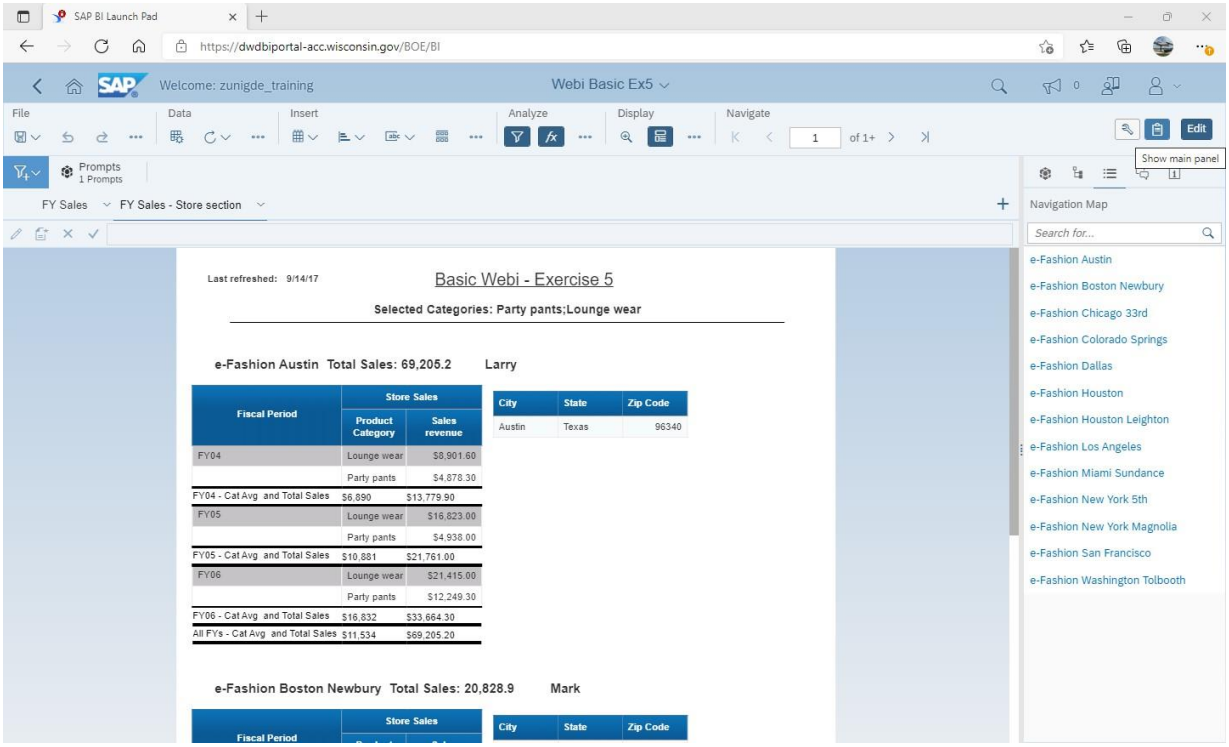


Navigation Map

In classic WebI, the navigation map is located on the left side pane shown below.

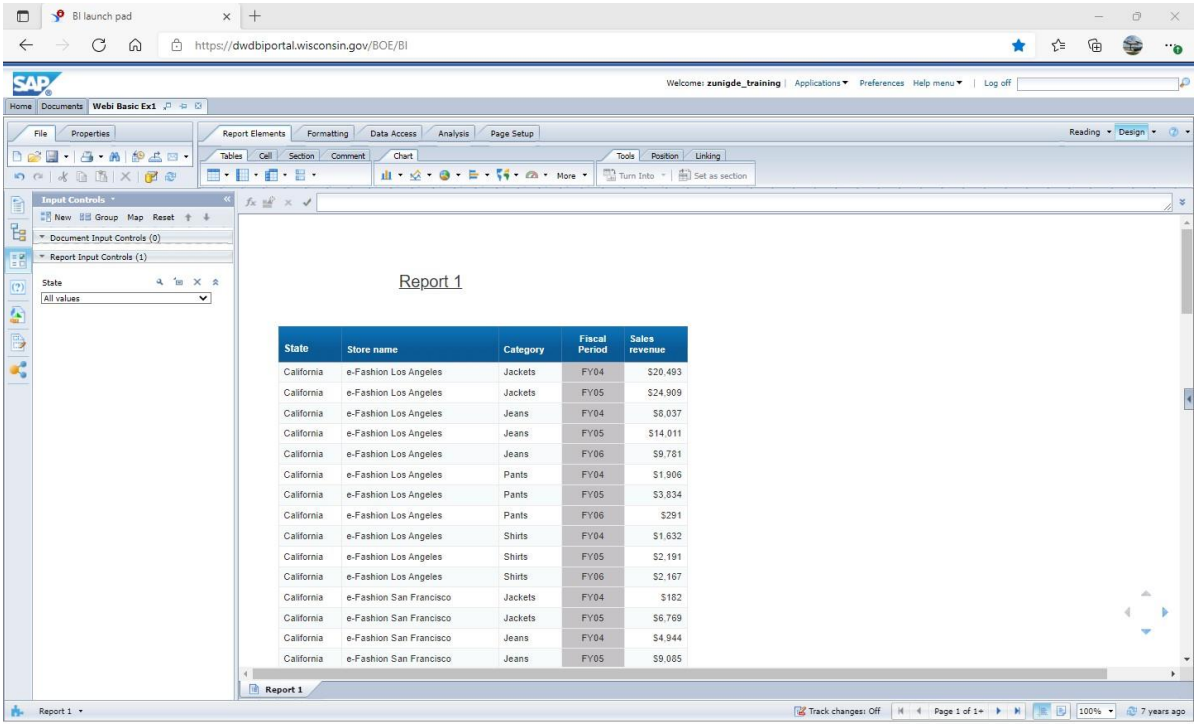


In the new Fiorified WebI, the navigation pane and other similar features that were in the left pane have now moved to the Main Panel. Toggling this on will show the Navigation Map as well as other features. The Navigation Map can now be searched. The Navigation Map only shows sections for the active report tab it no longer show all tabs in one view.

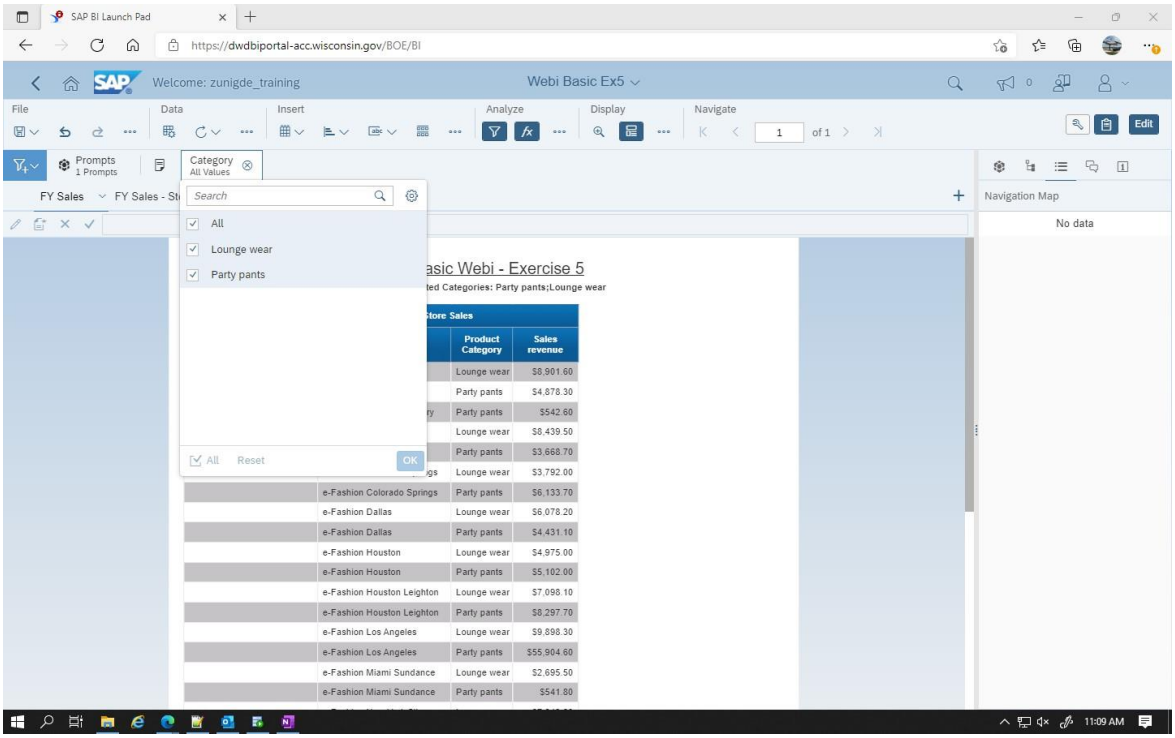


Input Controls

In classic WebI, the Input Controls can be found on the left panel.

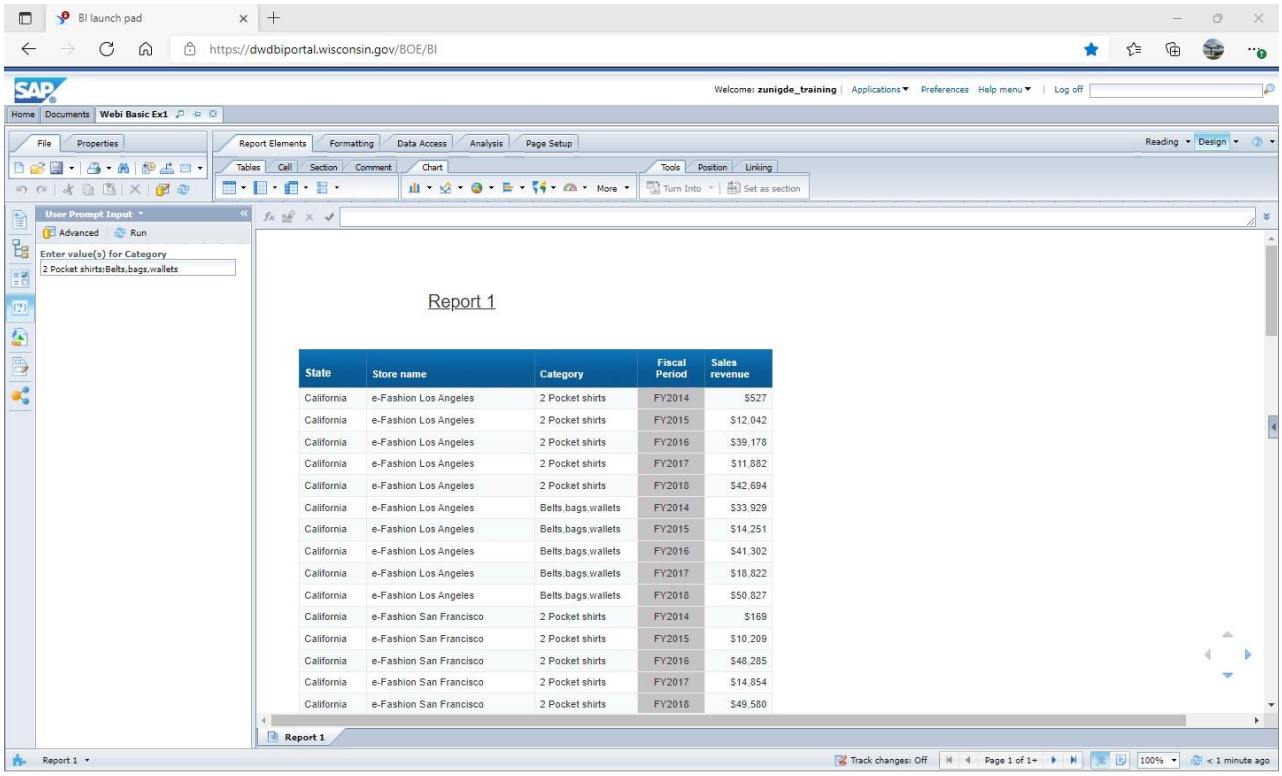


In the new Fiorified WebI, all of the filtering options have been consolidated into what used to be the filter bar. You can toggle the filter bar on and off by selecting the filter icon under the Analyze heading. The Input Controls are identified by the page icon on the filter bar. To invoke the Input Control, click on it and it will give options.

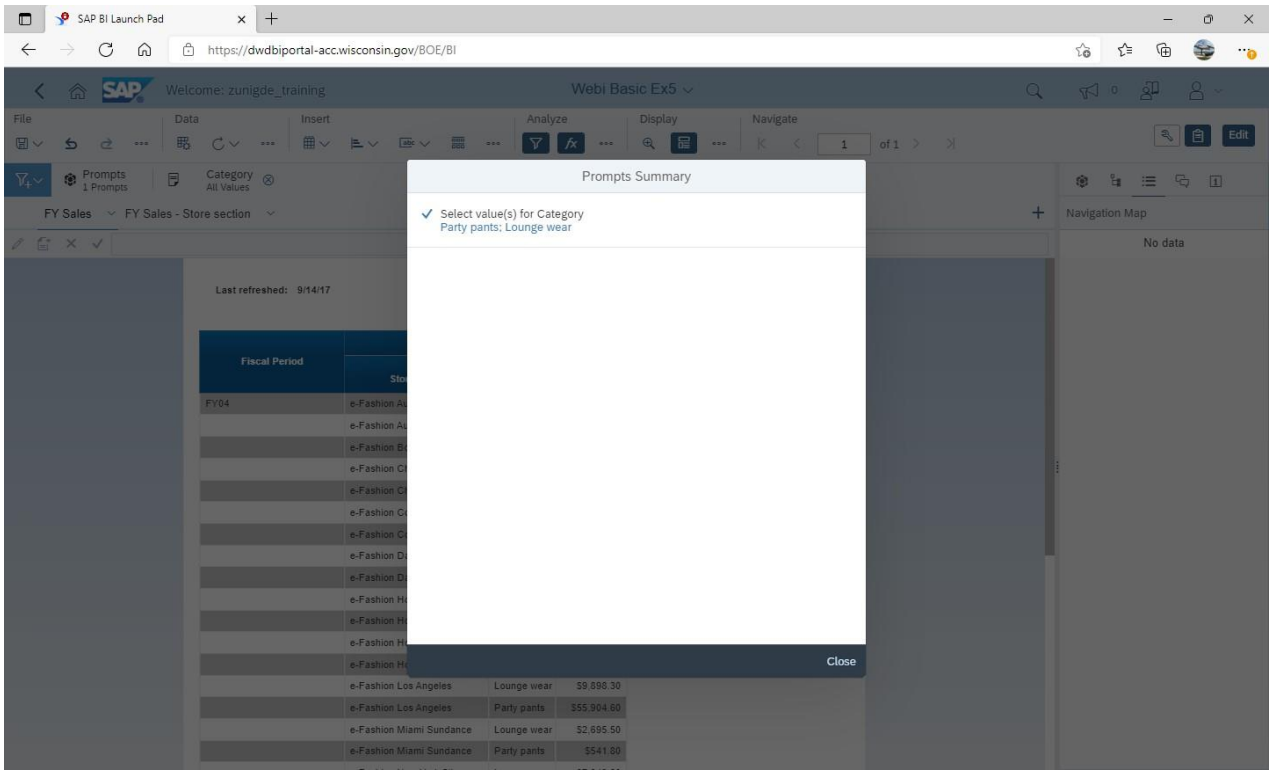


User Prompts

Classic Webi displayed User Prompts in the left panel as shown below.

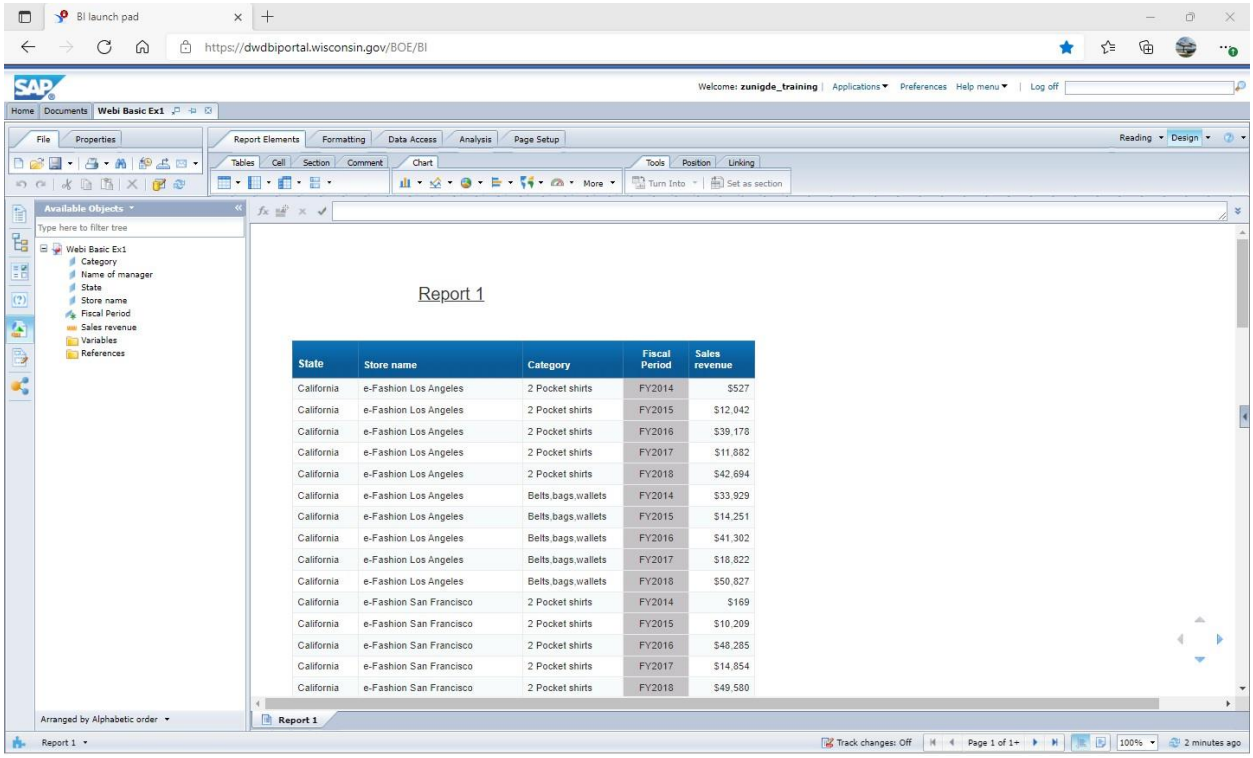


Fiorified WebI now shows user prompts in the filter toolbar along with input controls and other filters. Within the filter bar the prompts will be listed as a count but clicking on the Prompts icon will show you the Prompt Summary.

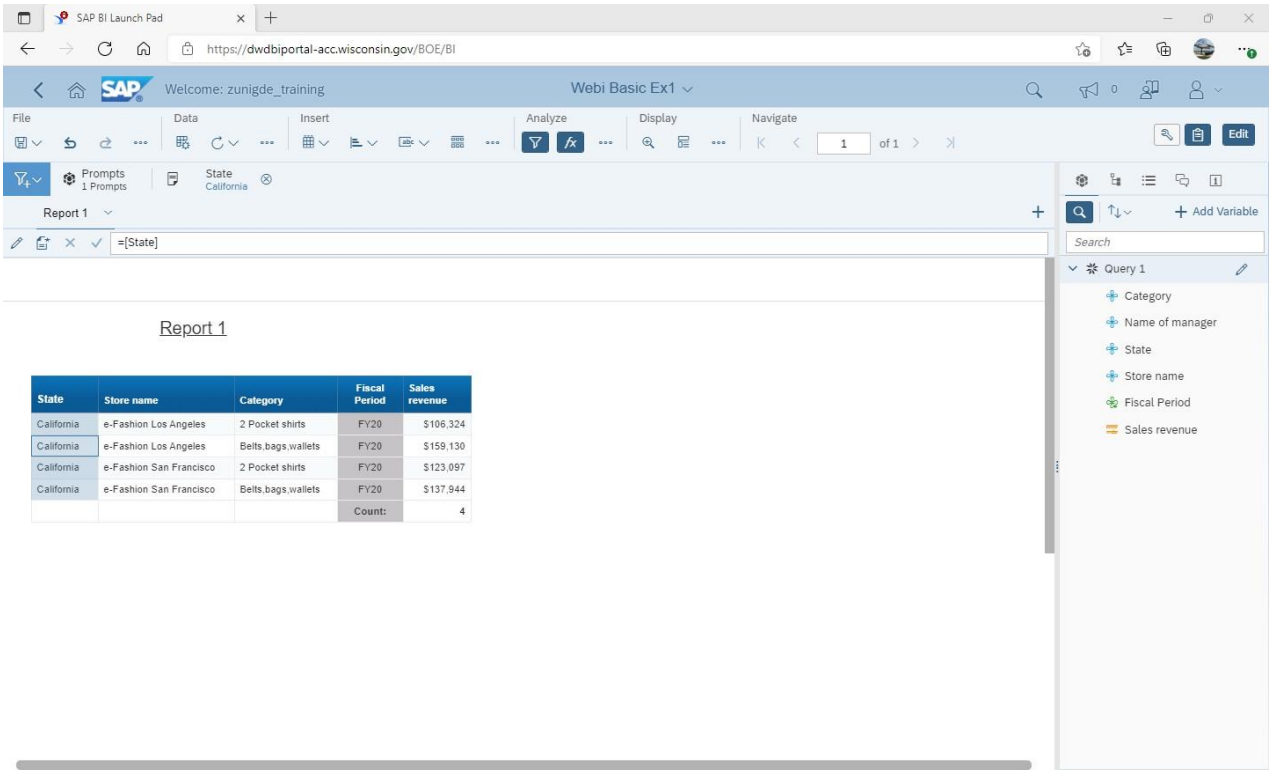


Available Objects

In the classic WebI, the Available Objects from a query was located in the panel.

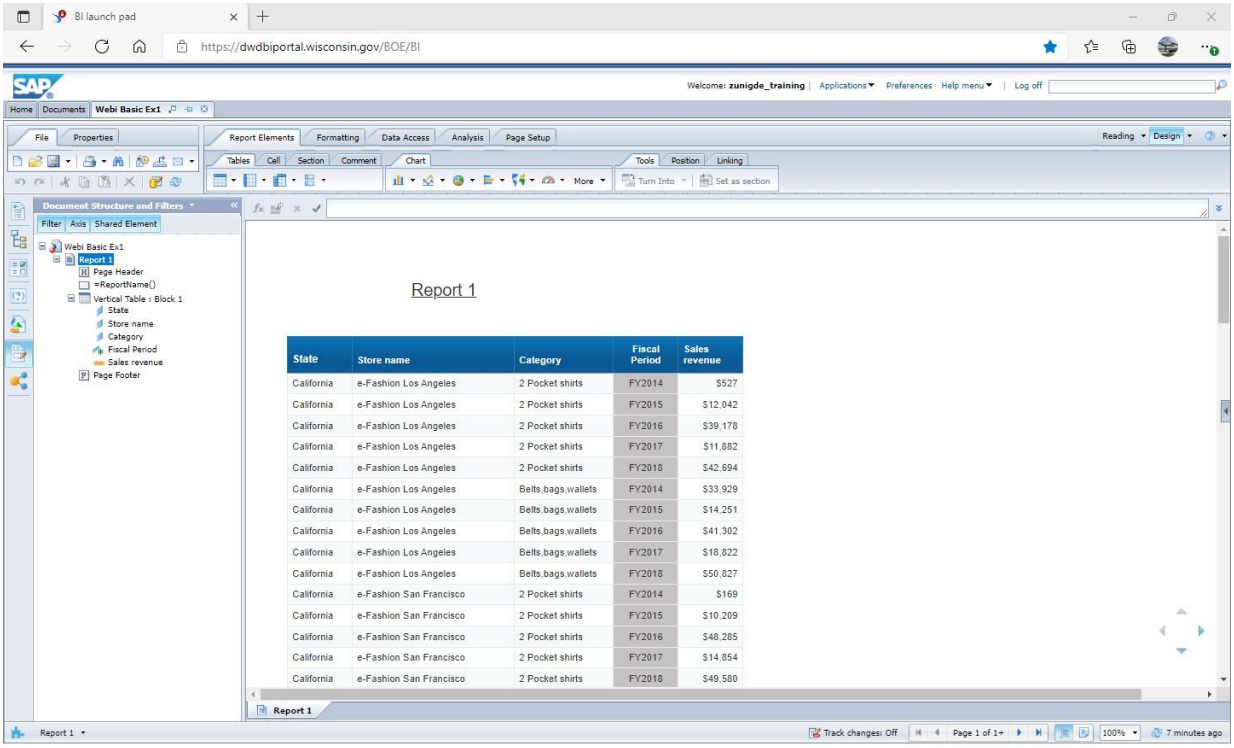


Available Objects in the new Fiorified WebI is now located in the Main Panel under the cube icon. Remember the Main Panel is a toggle so it may now be visible unless you click on the icon.

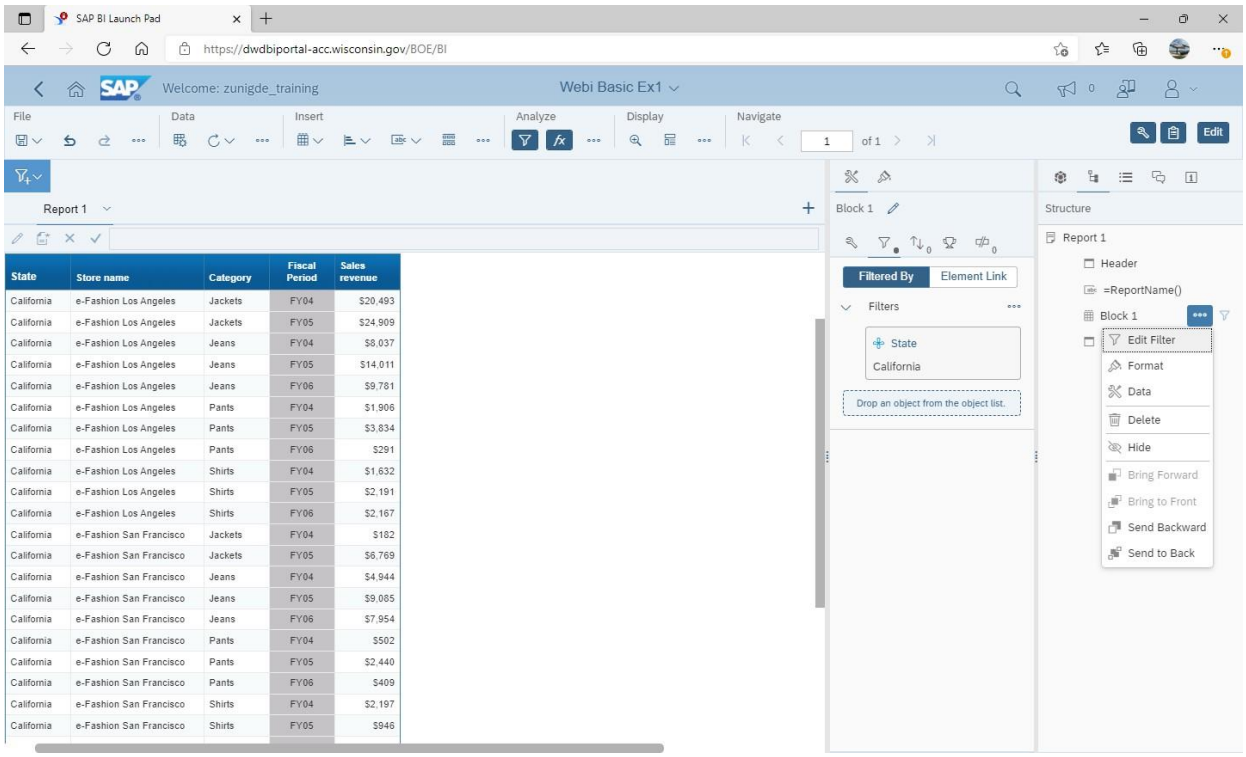


Document Structure and Filters

The Document Structure and Filters feature is located in the left panel in classic WebI.



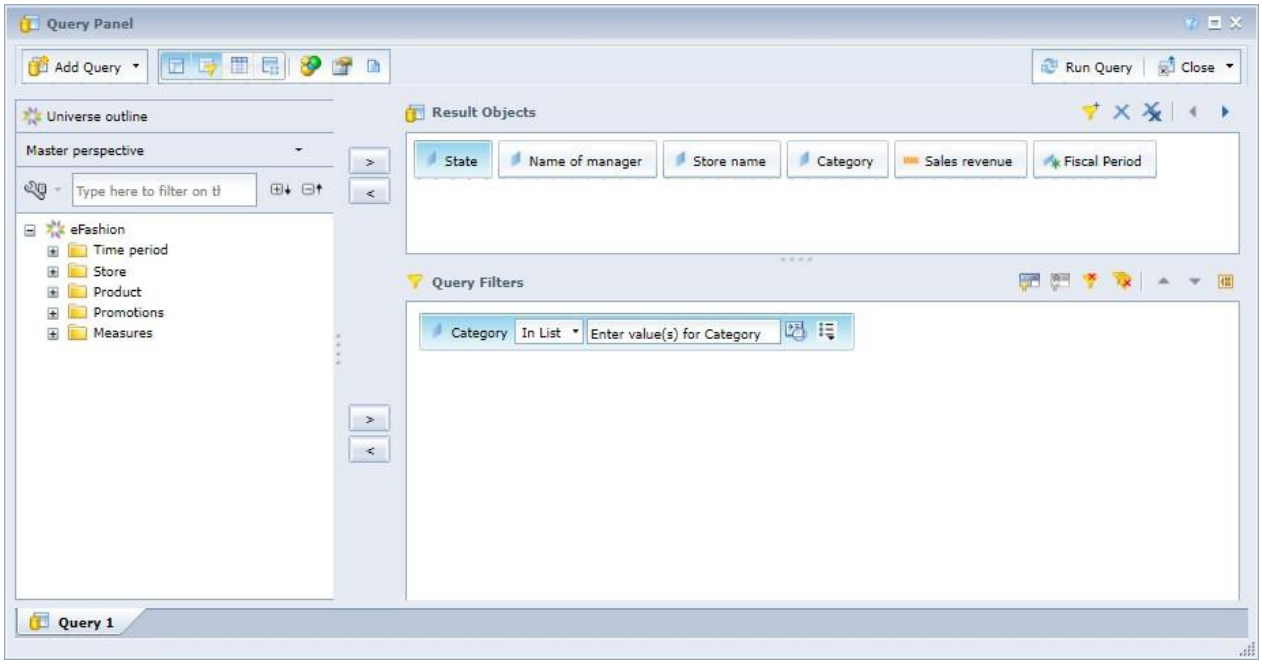
The Document Structure and Filters is now within the Main Panel and filters are not directly editable from this menu. Filters are identified by the filter icon and to edit the filter you need to click on the ellipsis next to the object to get the Edit Filter option. This will open the properties menu for the object you selected.



Query Panel

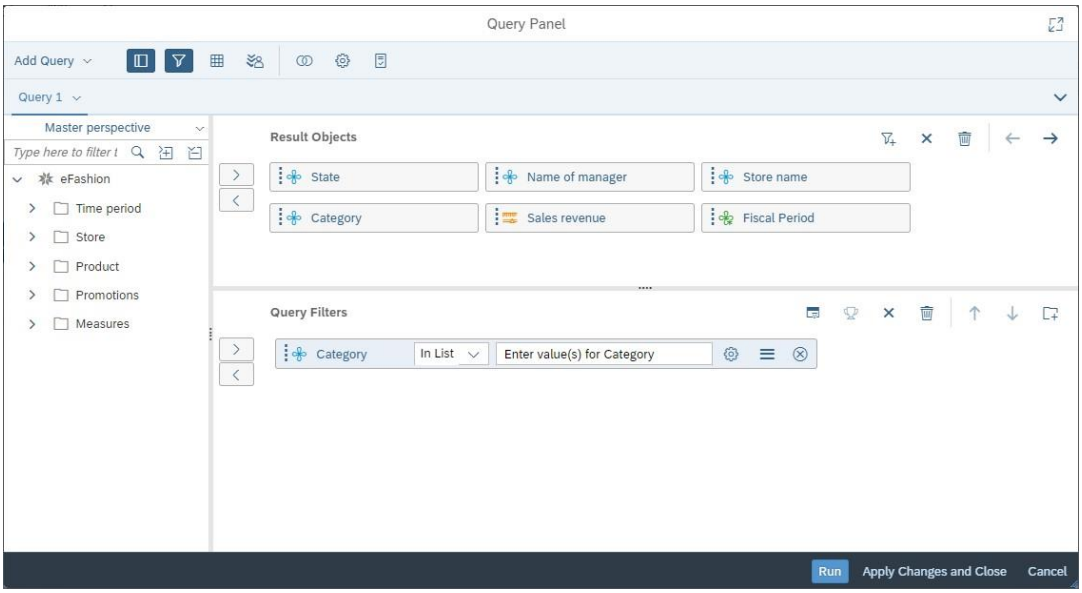
The Query Panel has really only changed cosmetically. All the same functionality is there but the icons may have changed.

Classic Query Panel



Fiorified Query Panel

The query panel is accessed via the Data menu in editing mode.


Query Panel
Add Query
Query 1
Master perspective
Type here to filter t
eFashion
Time period
Store
Product
Promotions
Measures
Result Objects
State
Name of manager
Store name
Category
Sales revenue
Fiscal Period
Query Filters
Category
In List
Enter value(s) for Category
Run
Apply Changes and Close
Cancel