

Draft - User Instructions – EMIS & Bex Web Analyzer

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The following information is provided to supplement the DOI Learn course instructions on FBMS Reports.

General Information:

1. Collapse/Expand Navigator
 - a. Function Key F11 toggles the screen between Expand and Collapse modes.
 - b. To collapse the navigation panel, Left Click on the small “triangle” below “EMIS Home”
 - c. To expand the navigation panel, Left Click on the small “triangle” just below the “Breadcrumb” on the left of the screen.
2. To delete personalization (which retrieves the same Bookmark (report) every time you attempt to open another Bookmark.
 - a. Open report -> In the body of the query Rt click and select “Personalize Web Application”, then select “Delete Personalization”
3. Folders
 - a. BLM_BEX_Admin
 - i. SPOC can create folders below BLM and specify users & define rights
 - b. My Favorites
 - i. Use for permanent Bookmarks/queries
 - c. My Portfolio
 - i. Use for developing bookmarks/Queries (Work-in-progress)
4. For year to date financial information, leave the “Posting Period” blank unless you are interested in transactions in a specific time period.
5. Total Obligations equal “Commitments + Unliquidated Obligations + Expenditures”
6. Totals
 - a. Position cursor one column to the right of the column to be totaled, then Rt Click -> Properties -> Characteristics -> General Tab->Display Results-> Select Choice from Drop Down Box; e.g. select “Always”
7. Data Names/Titles
 - a. Rt Click -> Properties -> Characteristics -> General Tab->Display -> Select Choice from Drop Down Box; e.g. select Key & Medium Text
 - b. Titles only works for non-parsed data elements (therefore, it will not work with FA Budget Program)
8. Delete Bookmarks (files)
 - a. EMIS Favorites
 - i. 

Left click on left lower corner → Organize Entries → Rt click on symbol at end of file name → Select Delete
9. System:
 - a. Data Store → InfoCube → Multiprocessor → Query → Bookmarks
10. Standard Queries
 - a. Build Bookmarks
11. Aggregates

- a. Building them speeds up processing
- 12.

Query Tools

1. Filter

- a. The “Filter” selection is found by scrolling to the right side of the screen
- b. To change Filter Values, left click on the drop-down arrow and select either “Show All Values”, “Edit”, or “Clear”.
- c. If “Show All Values” is selected, then all values will be selected and displayed.
- d. If “Edit” is selected then a window opens with choices on the left side (named “All) of the screen.

i. “Show Tool”

1. Single Values

- a. To “Add” values, select your choice(s) from the “All” box (left side of screen) by left clicking on the value(s) you want (selected choices will then be highlighted in orange) and then left click on the “Add” button to include your choices in the “Selections” box, right side of screen.
- b. To “Remove” values, select your choices from the “Selections” box (right side of screen) by left clicking on the value(s) you want removed (selected choices will then be highlighted in orange) and then left click on the “Remove” button to exclude the selected values from the “Selections” box,

ii. “Show View”

- 1. All
- 2. Search

iii. Value Ranges

- 1. Sign: Select one of the following:
 - a. Include
 - b. Exclude
- 2. Operator: Select one of the following:
 - a. Between
 - b. Equal
 - c. Greater
 - d. Greater or Equal
 - e. Lower
 - f. Lower or Equal
- 3. From: Either left click on the small square to open a window of choices **OR** type in your choice. A wild card, the asterisk, “*”, can follow your choice
- 4.

2. Settings

a. In the “Data Provider” tab the user can do:

i. Data Formatting

1. To display rows hierarchically and expand/collapse rows, place a check mark in the box “Display rows hierarchically and ...” by left clicking on the small box. Left clicking on the drop down box allows the user to drill up (collapse) or drill down (expand) the rows on the Bookmark. Left click the “Apply” button to initialize the action.

ii. Number Formatting

iii. Zero Suppression

1. Zero suppression can be applied to columns or rows by selecting the desired action from the drop down boxes

3. New Analysis

a. Opens a screen that contains five tabs:

- i. Search
- ii. History
- iii. Favorites
- iv. Roles
- v. InfoArea

4. Open

a. Opens a screen that contains three tabs for selecting queries:

- i. Favorites
- ii. BEx Portfolio
- iii. My Portfolio

5. Save As...

a. Opens a screen that contains three tabs for selecting where you want to save the bookmark.

- i. Favorites
- ii. BEx Portfolio
- iii. My Portfolio

6. Variable Screen

a. Variable Entry Screen is the means for entering both

- i. General Variables and
- ii. Variable Personalization

b. In both “General Variables” and “Variable Personalization”, go to the “Current Selection” column and Left click on the small square of the Variable you want to create. This opens another window which allows you to select either “Single Values” or “Value Ranges”. Select your variable value and then left click the “Add” button. To remove a Variable, select it by left clicking on the Variable and then left click on the “Remove” button. Once all Variable have been “Added” and/or “Removed”, left click on “OK” at the bottom right of the window.

7. Information

a. Provides General Information as well as information on Static Filters, Dynamic Filters, and Variables

8. Send

a. Lt click on “Click Here” →Text Tab (Texts only) →Save →Technical Name (Any name with no spaces)

9. Print Version

- a. Export Dialogue box opens that allows user to set “Scaling Factor,” “Margins,” “Page Orientation,” “Header and Footer,” and when click “OK” generates a report, in Adobe pdf format, that can be saved and/or printed.

10. Export to Excel

- a. File Download dialogue box opens that allows user to “Open”, “Save” or “Cancel” file.

11. Comments

- a. DocumentBrowser Dialogue box opens. Left clicking on “New” provides user with three choices: “Comment”, “Formatted Text”, and “Upload”