Multi Topic Information Access
How Do I … Guide

November 10, 2013

The Florida Safe Families Network (FSFN) How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference companion to the User Guide that includes additional details. Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for the User Guide and additional resources.

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Access and Management

How Do I…?	Selections	Tips & Guidelines
Accessing the Reporting Tools	• From the FSFN Reporting Subsystem through Infoview.	*The Data Warehouse Business Object (BO) tool suite, InfoView, will be used to provide reports and ad hoc query access for the Florida Safe Families Network user community. There are various levels of user access to the tool suite through FSFN report ring structure. The users will have the ability to save reports locally in .pdf or MS Excel formats. InfoView, a component of BO tool suite will be used as part of the FSFN structure.*
Search and Retrieve Reports	• From the FSFN Reporting Subsystem through Infoview • Assign report to folder • Search for report • Advanced Search for Report • Filter Reports Displayed	
View a Report – Apply Filters, Sorts, and use Drill Downs	• List of Reports • Select View Latest Instance • Select History • Select Schedule • Select Modify • Select Properties • Select View a Report – Pane View	*View Latest Instance - will retrieve the results of the most recent execution.* *History - will retrieve a list of every time this particular report has been run.* *Schedule - will launch the Schedule Window.* *Modify - will launch the report within the Report Designer.* *Properties - will display report properties such as the report name, description, keywords, and categories. All these elements can be modified if you have sufficient security* *The pane on the left can display any one of the following or be hidden:* *Document Summary* *Data Summary* *Chart and Table Types* *Available Objects* *Document Structure and Filters* *Navigation Map* *User Prompt Input* *Find*

	• Select View a Report – Drop Down Menu • Using Drill Downs within a report • Start Drill Mode	*The Document dropdown is like the File dropdown in Microsoft Office. The Document dropdown lets you close the Report, edit the report, and save the report. The Save and Save As selections save the report as a Web Intelligence document within InfoView. The "Save to my computer as" is like an Export option.* *The View dropdown determines how the report is displayed (Page, Draft, or PDF mode) and what toolbars and other visual components are displayed (i.e. Left Panel, Status Bar).* *The Insert, Save, Find, Undo, Zoom, and page selectors are pretty intuitive to their function and use.* *Click on the Magnifying Glass icon in the upper right corner of the screen to "Start Drill Mode".* *This enables the drill down features within a report.*
Managing Report Folders and the Inbox	• View Reporting Inbox • Create a Folder/Category • Enter Folder Details • Verify Folder was Created • Move one or more selected reports to another folder • Copy one or more selected reports to another folder	*Creating a Category is exactly like creating a Folder. Must switch the object navigator to the Category view to create a Category.* *Select the one or more reports to be moved.* *Click the Move button* *Navigate to an existing folder* *If this is the final target of the selected reports, click OK* *If the final target of the selected reports is a new folder within the existing selected folder, enter the name of the new folder and click Add.* *Click OK* *Select the one or more reports to be copied.* *Click the Copy button* *Navigate to an existing folder* *If this is the final target of the selected reports, click OK* *If the final target of the selected reports is a new folder within the existing selected folder, enter the name of the new folder and click Add.* *Click OK*

FSFN Universes		
How Do I…?	**Selections**	**Tips & Guidelines**
Overview of FSFN Universes/Domains	• Universe vs. Domain • Universe/Domain Terminology	*The Universe is a collection of the applicable data from FSFN and a number of tools to look at the data.* *The Domain is the application of the Universe with their knowledge.* *It's their knowledge of the providers, clients, and environment here in Florida that gives meaning to the FSFN data.* *A Universe or Domain is an abstract layer on top of the database to isolate users from the technical details of the database and enable users to more easily and quickly create reports based upon functional requirements.* *The FSFN Universes are built upon specialized data marts, not production FSFN.* *Important to note that each data mart underneath the FSFN Universes is refreshed with production data on a scheduled basis. The production data is aggregated, denormalized, and otherwise massaged before it is loaded into the data marts.* *Data entered into FSFN production will not be immediately available in the data marts or Universes.*
	• Classes – logical representations of the underlying database tables	*Each class is a collection of dimension objects (fields). The shaded boxes within a class are subclasses or a group of object details under a single dimension object. The shaded box is named after the subclass or dimension object. A dotted line around more than one object represents a collection of details under a dimension object that is in turn a detail object under a higher dimension object.*
	• Filters – frequently used rules to restrict the data retrieved. > Active Out of home Care > Active In Home Care > Primary Care Assignment > Out of County Assignments	*These prepared filters can be used along with custom filters to exclude data not relevant to the current report*

FSFN Universes		
How Do I…?	**Selections**	**Tips & Guidelines**
	> Children Over 18 Yrs. > Photo Due Date in the next 30 Days > Birth Certificate Fingerprints Photograph Due > Active Primary Goal of Adoption	
	• Date Dimensions – provide additional information about a date field for reporting purposes > Home Visit Current Residence Dimension > Removal Date Dimension • Hierarchies – defined data elements to enable drilling up and down within reports > Location Measures – these retrieve numeric data and often are a result of a calculation on data within the database. > Number of Active In-Home Children > Number of Active Children > Number of Active Out of Home Children	*This information can include date characteristics such as the State and Federal fiscal month, quarter, and year.*
(CARS) Children Actively Receiving Services	• Provides information about all the children within FSFN actively receiving In-Home or Out-of-Home services. • This information is extracted from FSFN on a nightly basis and loaded into this Universe	*Child Information* *Case Information* *Worker Information* *Visitations* *Services* *Provider* *Demographics*
Child Investigation Status	• Provides information about the status and key milestones for each investigation within FSFN. • This information is extracted from FSFN on a nightly basis and loaded into this Universe	*Intake/Case Information* *Initial Received Date, Commencement Date* *Victim/Victim seen/Children seen Count* *Approval Dates*

FSFN Universes		
How Do I…?	**Selections**	**Tips & Guidelines**
		Safety Assessment/Reviews/Completed Dates *Investigator* *Investigation/Case Type/Location*
CPS Visitation	• Provides information on documented face-to-face visits with children active within a FSFN Living Arrangement or Removal Episode/Out of Home Placement • This information is extracted from FSFN on a nightly basis and loaded into this Universe	*Child Information* *Case Information* *Worker Information* *Most recent visit date* *Days not seen/Reason not seen*
Eligibility Universe	• Provides information on eligibility determinations within FSFN. This includes Title IV-E Foster Care and Adoption Eligibility, TANF Foster Care and Adoption eligibility, and Medicaid eligibility. • This information is extracted from FSFN on a nightly basis and loaded into this universe. • Click the Continue button • Enter the CBC/Fiscal Agency or Region/Zone. • The page automatically updates.	*Foster Care eligibility and redetermination* *Adoption eligibility and redetermination* *TANF eligibility* *Medicaid eligibility* *Location* *Worker*

Family Assessment/Case Planning		
How Do I…?	**Selections**	**Tips & Guidelines**
Family Assessment/Case Plan	• Provides information on the Family Assessments and Case Plans for each Case within FSFN. • This information is extracted from FSFN on a nightly basis and loaded into this universe.	*The Family Assessment is completed for a case by the Primary Worker. It is an instrument used to aid workers in their analysis of issues surrounding the family.* *A Family Assessment goes beyond the investigation as a first step in the process of identification and provision of services that are specifically targeted to address the family's needs and problems and insure the child's safety, well-being, and permanency. Case Plan is a tool for case management and is completed for every child that enters protective services or out of home placement. A Case Plan is developed based on an analysis of the*

Family Assessment/Case Planning		
How Do I…?	**Selections**	**Tips & Guidelines**
		familial situation – often through a Family Assessment. The purpose of the Case Plan is the identification of objectives to be achieved to ensure the safety and wellbeing of the child(ren) involved. The Family Assessment/Case Plan domain information includes: *Family Assessment Completion date* *Family Assessment Due date* *Responses to various questions* *Location* *Worker* *Service Types* *Services Planned* *Services Received* *Services Rejected* *Services Deferred* *Services Not Available*

Financial		
How Do I…?	**Selections**	**Tips & Guidelines**
Financial	• Provides information on payments and checks generated within FSFN • This information is extracted from FSFN on a nightly basis and loaded into this universe.	*The Financial module is a core module in the FSFN system that connects the services with the providers. When a child is placed with the foster family; payments will be generated on a pre-defined schedule for the services that are provided. FSFN system generates these payments on an ongoing basis and will also generate Invoices for the payments generated for these providers. Financial Domain information includes:* *Payments for the services* *Invoices for the Providers (Foster Families)* *Checks generated for the Providers (Foster Families)* *Location* *Worker*

Additional Universes

How Do I…?	Selections	Tips & Guidelines
Hotline	• Provides information on the Initial, Additional and Supplemental Intakes related to Child, Adult and Special Conditions. The Universe also includes information for Intakes Received Historically, On Call Schedule and PI/CI Workers. • This information is extracted from FSFN on a nightly basis and loaded into this universe.	*Additional information is added to the domain such as call records for children and adult based on call types such as:* *Complaint/ CRC* *Duplicate/Fax* *Hang-ups* *DCF Record Check* *No means to locate* *Information in this Universe includes:*
ICWSIS	• Contains all the information from the Interim Child Welfare Services Information System (ICWSIS) to be decommissioned as FSFN rolls out. • This information is loaded weekly from the CBC ICWSIS extracts. Once ICWSIS is decommissioned and no longer available, this universe will provide a historic record of the ICWSIS data.	*This Universe is a complete extract of the consolidated ICWSIS maintained in Tampa.* *Information in this Universe includes:* *CIC Client Provider Information* *Current Placement Information* *Placement History* *Client/Provider Demographic* *Provider Licensing* *Voucher History* *Counselor* *Expenditure Type*
Missing Child (MCN)		*Information in this Universe includes:* *Missing Child Demographics/ Placements/Fingerprints/Photographs* *Missing /Recovery Dates, Status, Duration Missing* *Recovery Address and Recovery Type* *MCR Current Approval Status* *Missing and Recovery Historical Data analysis.*
Provider	• Provides provider demographic information and the licensed services and service rates for both Organization and Person providers within FSFN. • This information is extracted from FSFN on a nightly basis and loaded into this universe.	*Information in this Universe includes:* *Services from the providers* *Service rates* *Provider Address* *License* *Fiscal Agency*

Additional Universes		
How Do I…?	**Selections**	**Tips & Guidelines**
SM Milestone	• Provides information on monitoring and tracking of such activities as case maintenance, placements and legal actions. • This information is extracted from FSFN on a nightly basis and loaded into this universe.	*Information in this Universe includes:* *Milestones* *Legal Actions* *Adoption* *Out of Home Placement* *Case Maintenance*
SVC Snapshot	• This information is extracted from FSFN on a nightly basis and loaded into this universe.	

Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
Developing Reports – Crystal Reports	• Create a report with Crystal Reports • Select File/New/Standard Report • Expand Create New Connection • Click Universes • Enter the Login information of the Business Object Enterprise (BOE) instance • Select the Universe • Drag the desired Objects from the left pane and drop them onto the report panel • Click Ok once all the desired Objects have been selected. • Click Next • Select the Objects to be displayed on the report then click Finish • Review Report • Apply a Group to a Report • Enter the Group Settings	*The **System** dropdown will display the server names of the BOE instances.* *FSFN System Test BOE fsfnboeuver4.dcf.state.fl.us* *The **User Name** and **Password** are the user id and password used to login to the BOE instance.* *The **Authentication** should be left as Enterprise.* *On the Insert dropdown menu select Group* *The Insert Group dialog box appears. Select the field you want the data grouped by from the top drop-down list. Here we will select the Group By District* *Select the sort direction from the second drop-down list.* *If you want to show a different value in the group header, click the Options tab.* *To add a Running Total, right click on the Running Total Fields label under the Field Explorer Section on the right side of the report, and select New.* *Running total fields are similar to summary fields but allow more control over how the*

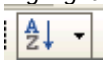
Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Add Running Totals • Enter Running Total Settings • Drag and Drop the Running Total • Create a Formula • Create a Filter • Create Prompt	*total is calculated and when it's reset.* *The Create Running Total Field screen will appear. Here you can enter the name, which field that you want to summarize, how you want to summarize that field, and the evaluation/reset criteria.* *Click OK* *Drag the Running Total from the Field Explorer and Drop onto the report in the desired location.* *To create a formula in Crystal, right click on the Formula Fields label under the Field Explorer Section on the right side of the report, and select New.* *Once you've entered a name for the formula, the above screen will appear. In this screen you can enter your formula. You have the option of selecting query fields and pre-built operators/functions.* *Creating filters in Crystal is the same as in Webi, except that when you want to remove a filter in crystal, you drag the object outside of the Query Filters box instead of right clicking and selecting remove.* *Select the object you want to apply a prompt on and drag it to the Query Filters pane. The Filter Editor appears. By default, the name of the filter is the name of the filtered object.* *Select an operator from the list. You cannot use the following operators for prompts: Is null, Is not null, Both, and Except.* *Under Operator type, select Prompt. The Prompt text field shows the default message.* *If you want to change the default message, edit it to word a question. For example, you might ask "Which region do you want to see data for?"* *Check Select only from list if you want your prompt to display a list of values from which users can select value(s). Use this option to prevent users from typing a value that might not exist in the database.*

Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Sorting • Create an Alert	*Select the image and the above window will display. In this window, you can select fields and determine the sort order of those fields.* *On the Report menu, point to Alerts and then click Create or Modify Alerts. The Create Alerts dialog box appears.* *Click New. The Create Alert dialog box appears.* *Enter a name for your new alert in the Name box.* *Enter your alert message in the Message box. If you want the same message to appear every time your alert is triggered, enter it in the Message box. If, however, you want to use a formula so the message is customized with data elements, click the formula button to the right of Message to launch the Formula Workshop.* *Enter your alert message formula. For example, if you want to see the message "Country is a star performer" (where Country is the name of a specific country), you might create the following formula: ({Customer.Country}) + " is a star performer". The result of an alert message formula must be a string.* *Click Save and close to return to the Create Alert dialog box.* *In the Create Alert dialog box, click Condition. The Formula Workshop appears.* *Enter your alert condition formula. Alert formulas can be based on recurring records or on summary fields, but cannot be based on print-time fields, such as running totals or print time formulas. Alert formulas cannot have shared variables. If an alert formula is based on a summary field, any recurring fields used must be constant over the summary field. For example, if you are grouping on Country and Region, you might create an alert such as: Sum ({Customer.Last Year's Sales}, {Customer.Region}) > 10000* *In this case, your formula can refer to either Country or Region, but not City or Customer Name since these are not constant. Alert condition formulas can be created using either Crystal Syntax or Basic Syntax.*

Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Add a Chart • Use the **Data** tab to select the Fields to show on the Chart • Use the **Type** tab to select the type of Chart • Insert Lines • Draw Horizontal and Vertical Lines • Save Report As • Run a Report with Refresh button	*Clear the Enable check box if you do not want the alert to be evaluated. Otherwise, leave it selected.* *Select Insert / Chart from the dropdown menu.* *Select Insert / Line from the dropdown menu.* *Select File / Save As from the dropdown menu.* *Navigate to desired location using the Save As browser window.*
Developing Reports – Desktop Intelligence Reports (Deski)	• Create a report with Deski Select File/New • Select the Report Layout Check "Generate a standard report" • Select the Report Data Check Specify how to access data" • Select Universe as the method to access data • Select the universe • Drag and drop the Objects to the Report • Run the Report • Save Report to the Repository • Save to Local Machine	*This will launch the New Report Wizard* *Add the necessary objects to the report by dragging the appropriate objects from the list in the Left Pane to the Result Objects pane.* *Add any necessary filters at this time as well* *Click the Run button in the lower right* *Select File / Export to Repository from the dropdown menu to save the report in the Deski Repository.* *Select File / Save As from the dropdown menu to save the report to your local machine.* *Use the "Save As Type" dropdown on the Save As popup window to determine the format to save the Report as.*
Developing Reports – Web Intelligence Reports (Webi)	• Create a report with Webi • Select New/Web Intelligence Document • Select universe • Drag and Drop Objects and Filters • Run the Report with the Run Query button • Rename Title	*This will launch the list of available universes.* *The New Web Intelligence Document pane will list all the available universes.*

Develop Reports

How Do I…?	Selections	Tips & Guidelines
	• Add Calculated Field • Enable Drill Down • Drill Down by Agency • Drill Down by Unit • Filter on District or Unit • Export as PDF or Excel • Save within InfoView • Specify within Infoview	*To change the report name just double click on the report name cell and Type the required name* *To insert a calculation in a table* *Click a cell that contains data in the table or cross tab. The calculated field will apply to all the data in this column.* *To insert a Sum, click Sum on the report panel toolbar.* *The process of refining the data to lower levels of detail is called drilling down on an object.* *The hierarchy for the District, Agency and Unit is created in the Universe.* *To enable Drilling down within the report, select the "Drill" option from Info view menu bar*
Developing Reports Webi Reports – Filters, LOVs, Prompts and Sorting	• Prepared filters are displayed with a image within the list of objects. • Add a filter to a query with a double click on the filter name or drag and drop the filter object into the Query Filters group box. • Remove a filter by right click on the filter name within the Query Filters group box and select Remove. • Custom filters can be created within a single report using any dimension object, detail object, or measure. • Create a custom filter by dragging and dropping the object into the Query Filter group box. • Define the filter condition for each custom filter - conditions can be: ▪ a constant, ▪ a list of values (LOV) ▪ or a prompt • Create a LOV(List of Values)	*Once the dimension or measure object has been placed, you can select a condition and value for that object to be compared to.* *Custom filters allow you to choose one of the following when deciding on what value to filter on. You can choose to type in a constant as seen above, look up a value from a list of values (referred to as LOV values), or you can prompt the user to enter the value at the report run time. To choose one of these values, click on the button that the red arrow above points to.* *To remove a custom filter, right click on the filter and click remove* *Prompts are used to filter the report data at run time. When a user goes to run the report, it will prompt them to enter a value to filter the data.* *To create a prompt in Webi, drag a Dimension, Measure, or Detail object into the Query Filters group box and click the box at the end of the object as shown in the picture above. Select the prompt option in the list of drop down values.*

Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Create a Prompt • Sorting	*You can change the text that shows when the prompt is displayed, by modifying the text field of the object. In the picture above, the text field says "Enter Cd Response Priority."* *Highlight the column to sort and click the*  *image. This will display a drop down with a set of sorting options.* *You can also break the data up into separate smaller tables. Once again, highlight the column that you would like to apply the break on, and click on the* *image to break the table.*
Developing Webi Reports – Formulas and Alerts	• Create a Formula	*Within the Variable Editor you enter a name for the formula, determine whether it's a dimension, measure, or detail, and write your formula.* *Dimension objects retrieve the data that will provide the basis for analysis in a report, Measure objects are used when calculating sums, counts, etc., and Detail objects are used to provide more detail to the dimension objects.* *Webi comes with a set of pre-built functions and operators that you can use when creating formulas. These can be accessed by clicking on the tabs on the left side of the Variable Editor window. They're labeled "Functions" and "Operators."* *Once the formula has been created, it will show up under the Data tab of the report with all of the other objects that were selected to be used. (In the picture above, the formula will show up under the arrow pointing to the variable editor).*
Alerts	• Alerts change the format of a report when Alert conditions are met i.e. highlight a report field when the value is >18. • Enter the Alert Details	*To create an alert in Webi, click on the* *image circled above under the Edit Report tab.* *Once the Alerters pop-up box displays select a pre-existing alert or create a new one.* *Choose the object that you would like to check, the condition you want to check for, and the value to look for.*

How Do I…?	Selections	Tips & Guidelines
		There is also the option to change the format of the cell once the condition is met. When changing the format of the cell, you can insert a conditional formula. So for example if the case_id = 10 then display the case name in red otherwise display the case name in black. *Once the alert has been created, return to the report. Select the button again and then select the check box next to the alert(s) that you would like to apply to the report and then click ok.*
Developing Webi Reports – SubQueries and Security	• Subquery – is an SQL query inside of a larger SQL query • Building a SubQuery • Nested SubQueries • Security – the FSFN Universe objects are defined with the row-level security such that when a user that belongs to District I runs a report or query, they are only able to see District 1 data. Each user will have access only to the district data from which they belong. • Statewide users will have access to data from all districts • This security is defined within the universes so the reports do not need to check or evaluate user security	*A subquery is a more flexible kind of query filter that allows you to restrict values in more sophisticated ways than with an ordinary query filter.* *Subqueries are more powerful than ordinary query filters for the following reasons:* ▪ *They allow you to compare the values of the object whose values are used to restrict the query with values from other objects.* *They allow you to restrict the values returned by the subquery with a WHERE clause.* *You build a subquery in the Query Filter pane of the Query Panel.* *Note: You can mix subqueries and other types of query filter in the Query Filters pane.* *To build a subquery* ▪ *Add the objects that you want to appear in the query to the Result Objects pane.* ▪ *Select the object that you want to filter with a subquery.* ▪ *Click Add a subquery.* ▪ *The subquery outline appears in the Query Filters pane. By default the object you selected appears as the Filter object and Filter By object* ▪ *Select the operator and values used to filter the object in the WHERE condition.* ▪ *Click Subquery to add an additional subquery to the query filter.* *By default the two subqueries are linked in an AND relationship. Click the AND*

How Do I…?	Selections	Tips & Guidelines
		operator to toggle between AND and OR. *In addition to linking subqueries in AND or OR relationships, you can nest them (create subqueries within subqueries) by dragging an existing subquery to the area beneath the Drop an object here boxes.* *In this case the inner subquery becomes part of the WHERE condition of the outer subquery. To copy rather than move the subquery to the WHERE condition, hold down the Control key while dragging and dropping.* *In this case the second subquery remains at the same level as the first, and becomes part of the WHERE clause of the first*
Developing Webi Reports – Templates and Charts	• Table Templates available > Vertical table (default) > Horizontal table > Crosstab > Form • Vertical tables • Horizontal tables • Crosstab	*Vertical tables display header cells at the top of the table and the corresponding data in columns. By default, the header cells display the names of the dimensions, details, and measures included in the table. The body cells display the corresponding values.* *By default, Web Intelligence creates new reports as a vertical table.* *Horizontal tables display header cells at the left of the table and the corresponding data in rows. By default, the header cells display the names of the dimensions, details, and measures included in the table. The body cells display the corresponding values.* *This table format is useful for reports with several measures, such as financial reports and balance sheets.* Crosstabs display values for dimensions across the top axis and on the left axis. The body displays the values of a measure that correspond to the cross-section of the dimensions. For example, this crosstab displays values for [Quarter] across the top axis and displays values for [Districts] on the left axis. The body displays values that [Number

Develop Reports		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Form	of victims seen] for each quarter in each District. *Forms are useful in your report if you want to display detailed information per customer, product, or partner. For example, a form is a useful way of displaying individual customer records with information such as the customer account, name, address, and so on. Forms are also useful for formatting address labels for envelopes.* *This illustration shows few forms on a report. The form on the left displays personal information about the Child*

Develop and Structure Views		
How Do I…?	**Selections**	**Tips & Guidelines**
Structure View versus Result View Result View (default)	• From the FSFN Reporting Subsystem through Infoview. • Result View • Create a Chart Select Chart Template Set Axis View Results • Select Chart Template • Set Axis – Allocate Dimensions and Measures to the Chart Axis.	*If you are in Result View the button on the Toolbar displays as view Structure, and if you are Structure View it will be displayed as View Result.* *Drag the appropriate chart type from the Left pane and drop onto the existing report block.*
Developing Webi Reports – Setting Properties and Page Layout	• Properties Tab	*Used to set the properties of the currently selected report element. The property list changes depending on the selected element.* *i.e. if you select a cell, the Property tab lists the properties associated with cells. If you select a table, the Property tab lists those properties associated with tables.*

Develop and Structure Views		
How Do I…?	**Selections**	**Tips & Guidelines**
		If you select multiple report elements of different types, the Property tab shows only those properties that are common to all types. *A short help text for the selected property is displayed at the bottom of the tab.*
	• Basic Page Layout	*Basic Page Layout settings are displayed and editable on the Properties tab when the report is selected.*
	• Navigate to Document Properties	*You do not set document properties in the Properties tab. To set document properties, right-click on a report outside any of the above elements and select Document Properties from the menu to display the Document Properties tab.*
	• Edit Document Properties	*The Document Information section is read-only. This information can be changed by clicking the Properties link from a list of report.*
	• Advance Page Layout	*The Document Options section offers three options.* *The Data Synchronization Options section offers two options.*
	• Start each Table on a new Report page	*The Report Order section enables changing the order of the reports that make up this document. Each report is a tab within the Web Intelligence Document.*
	• Advance Page Layout • Start Each Table on a new Report page (cont...)	*Step 1 - select the table, right-click and select "Set as Section" from the menu.* *If the table is already in the Section format you can skip to the next step.*
	• Advance Page Layout • Start Each Table on a new Report page (cont...)	*Step 2 - select the "Edit Format" option. The properties tab changes and display the crosstab formatting options.* *Step 3 - check the checkbox for the "Start on new page" option within the Position section of the Properties tab.*
Developing Webi Reports - Scheduling	• Request to Schedule a Report	*Select the Schedule link*
	• Set Schedule Settings	*User can select the time and frequency of*

Develop and Structure Views		
How Do I…?	**Selections**	**Tips & Guidelines**
	• Sending Report to Email Recipients	*running the report using the "When" dropdown list:* *Now* *Once* *Hourly* *Daily* *Weekly* *Monthly* *Nth Day of Month* *1rst Monday of Month* *Last Day of Month* *X Day of Nth Week of the Month* *Calendar* *User can select the destination of the report using the "Destination" dropdown list:* *Default Enterprise Location* *Inbox* *Email recipients* *User can select the format to produce the report when viewed using the "Format" dropdown list:* *Web Intelligence* *Microsoft Excel* *Adobe Acrobat* *One of the possible destinations for a report is a list of email recipients.* *Selecting "Email Recipients" in the Destination dropdown and unchecking the "Use the Job Server's defaults" will display the fields shown in the screen shot to the left.*