WEB INTELLIGENCE PROMPTS
BUSINESS PROCESS PROCEDURE | WEB INTELLIGENCE

BOBJ

Purpose

The purpose of this document is to provide step by step detailed directions for interaction with the different prompts on Web Intelligence Reports.

Quick Links

Prompt Types

Every Web Intelligence (WEBI) report within the Business Objects repository has a unique set of prompts. These prompts determine the information that will be retrieved for the report generation. Each report will have a combination of different prompts. Every report will have mandatory prompts. These prompts must have values selected for the report to generate. Reports may also have optional and or exclusion prompts. Optional prompts can be used to narrow down the data that is complied in the report. Exclusion prompts are used to remove any data that falls within a specific criterion, resulting in the data being removed from the complied report. Exclusion prompts are predefined with some initial values for example contractors and National Guard. Exclusion prompts act as a sort filter and can be removed on the prompt summary to include previously excluded values. Both optional and exclusion prompts are used to create more efficient and effective reports. Each type of prompt has an indication labeling it as a mandatory, optional, or exclusion prompt.

Mandatory prompts are identified by a yellow-orange triangle with an exclamation point inside of the triangle (⚠) at the beginning of the prompt. Once values are selected for the prompt the triangle changes to a dark blue square with a check mark inside. Some mandatory prompts will be labeled "**Mandatory**" at the end of the prompt.

Optional prompts are identified with the phrase "**(Optional)**" at the end of the prompt.

Exclusion prompts are identified with the phrase "**Exclude**" at the beginning of the prompt and the phrase "**(Optional)**" at the end of the prompt.

Value Keys

Every prompt value has an additional alphanumerical value assigned to the text value name. These keys make every value unique. Some examples of the alphanumerical keys are the personnel number is the key for the employee's name, the position number 6####### is the key for the position's text name, the job number 3####### is the key for the Job's text name, etc. These keys can be displayed, directly entered, or searched for within the prompt. By default, the keys are toggled off, to turn the keys on click the **Settings** icon (⚙). Then toggle on **Search by keys**, to search by the key value, or toggle on **Show Keys** to display the key value.
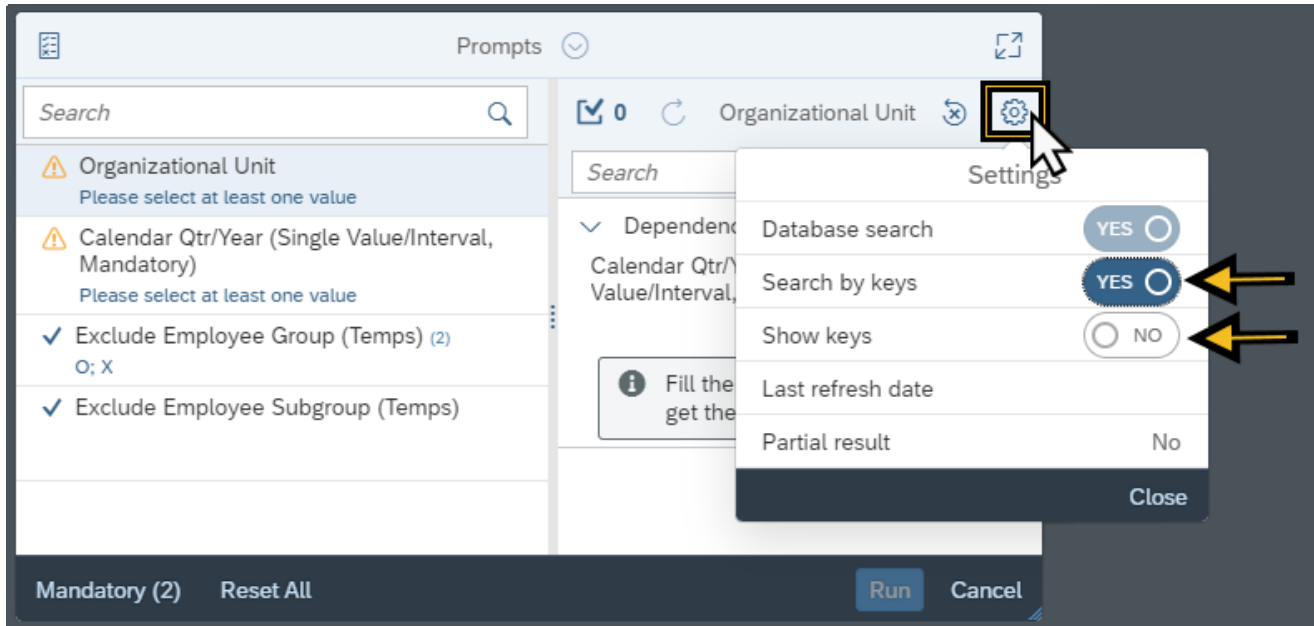
Searching Values

Some prompts have many values, making it difficult to locate a specific value from the list. If part of the value is known the Search field can be used to reduce the number of results on the list, making it more efficient to locate needed values. The search field is case sensitive, results will only be matched to the search criteria if these cases match. Wildcards assist with result retrieval. Wildcards are (*) asterisks placed in specific locations around the criteria to dictate the retrieved values. Use the following methods to assist in retrieving values.

- To retrieve values starting with the criteria, place the asterisk after the criteria.

    o Example: Criteria*

- To retrieve values ending with the criteria, place the asterisk before the criteria.

    o Example: *Criteria

- To retrieve all values that contain the criteria, place the asterisk before and after the criteria.

    o Example: *Criteria*
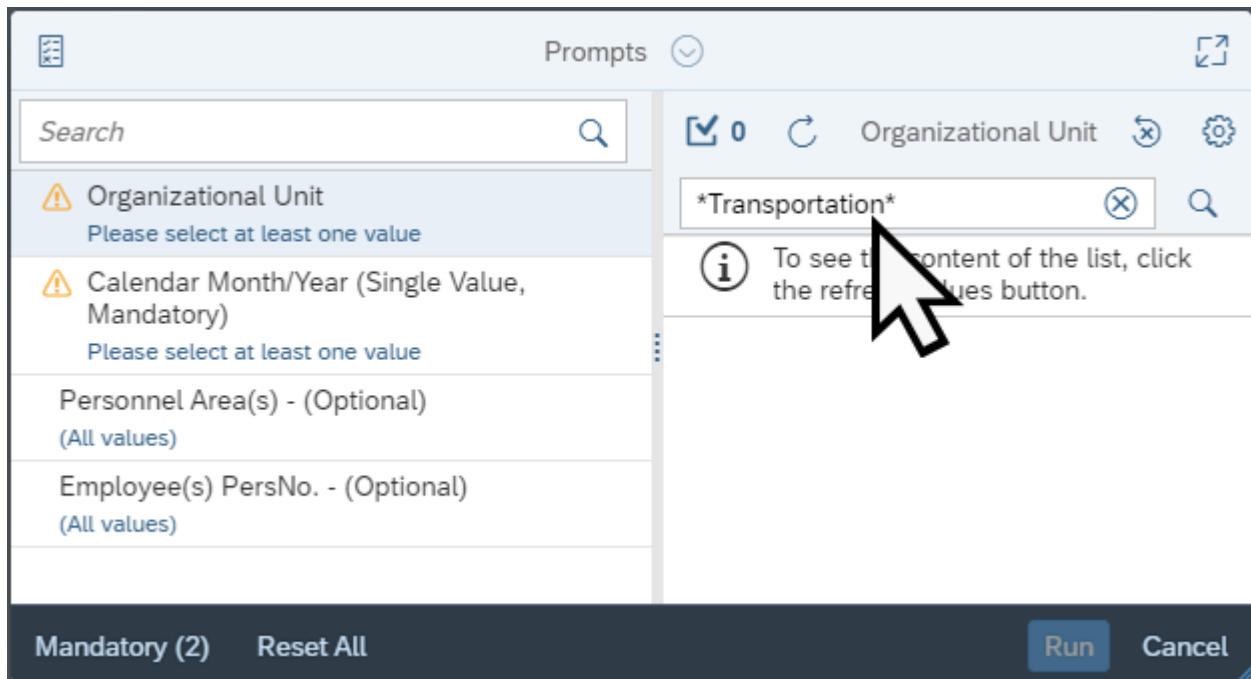
Prompt Dependencies

Some reports require prompts to be completed in a specific order, these reports have dependencies. If a report has dependencies, they are noted on the initial prompt summary screen under the search field. Clicking the **Expand** icon next to the word Dependencies will display the prompt that must be completed first. Once the dependent prompt is identified, it can then be completed to allow for additional prompts to be completed. When the dependent prompt has been filled select the other mandatory prompts from the left side panel.
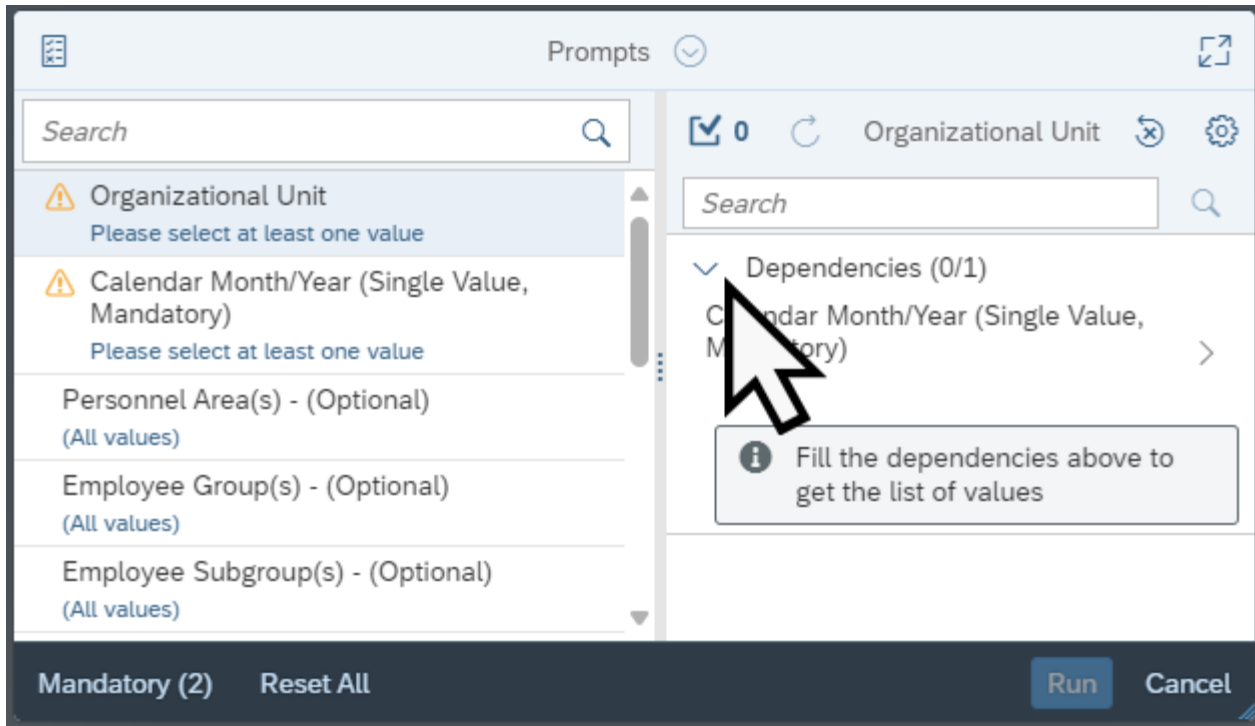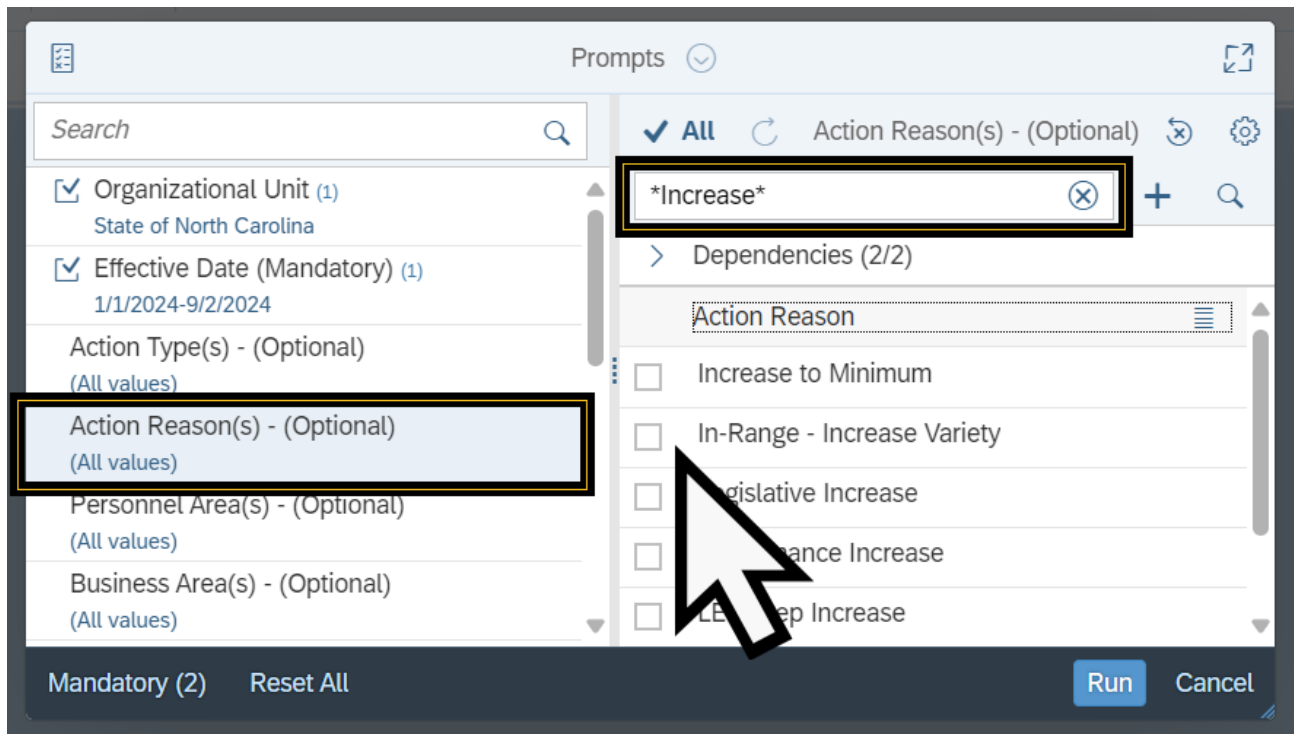
Prompt Types

Action Reason(s)

The Action Reason(s) prompt selects types of Action reasons to compile in the report. Follow the steps below to complete the Action Reason(s) prompt.

1. Select the **Action Reason(s)** prompt.

2. Use the Search field to enter the desired Action Reason. Wildcards (*) can be used to search for values.

3. Select the **Search** icon (🔍).

4. Select checkbox next to the desired Action Reason(s).

Action Type(s)

The Action Type(s) prompt selects types of Action data to compile the report. Follow the steps below to complete the Action Type(s) prompt.
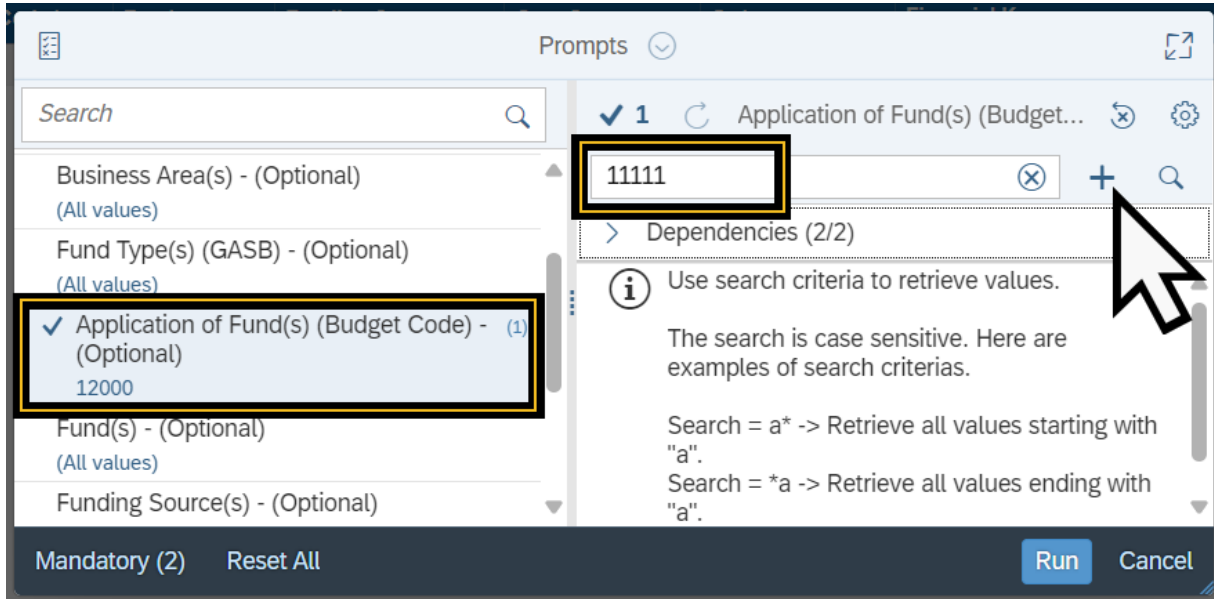
1. Select the **Action Type(s)** prompt.

2. Use the Search field to enter the desired Action Type. Wildcards (*) can be used to search for values.

3. Select the **Search** icon (⚲).

4. Select checkbox next to the desired Action Type(s).
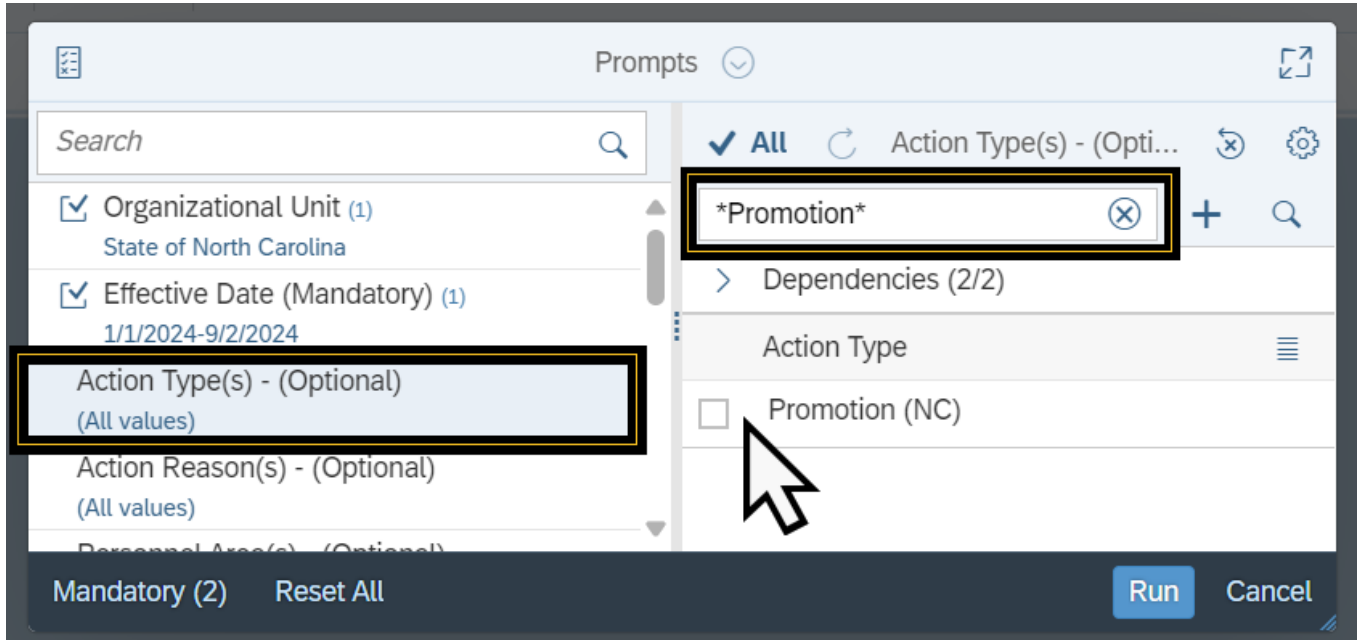
Application of Fund(s) (Budget Code)

The Application of Fund(s) (Budget Code) prompt locates Budget Code. This prompt can be populated by searching for the Budget Code. Follow the steps below to complete the Application of Fund(s) (Budget Code).

1. Select the **Application of Fund(s) (Budget Code)** Prompt.

2. Enter the Budget Code in the Search field.

3. Select the **Add** icon (✚).

4. The value will be added to the Selected Value list below the Search field.
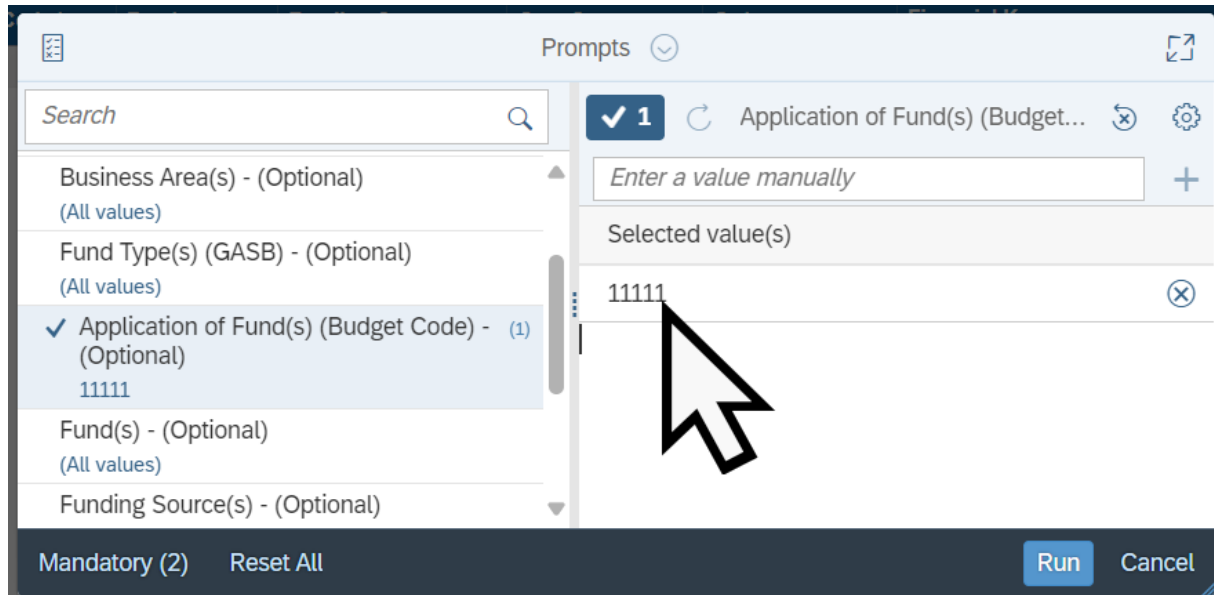
Business Area(s)

The Business Area(s) prompt selects Business Area data to compile the report. Follow the steps below to complete the Business Area(s) prompt.

1. Select the **Business Area(s)** prompt.

2. Use the Search field to enter the desired Business Area. Wildcards (*) can be used to search for values.

    a. Alternatively, use the settings to toggle the Search by Keys on and enter the Business Area code into the search field.

3. Click the Search Icon (🔍).

4. Select checkbox next to the desired Business Area(s).
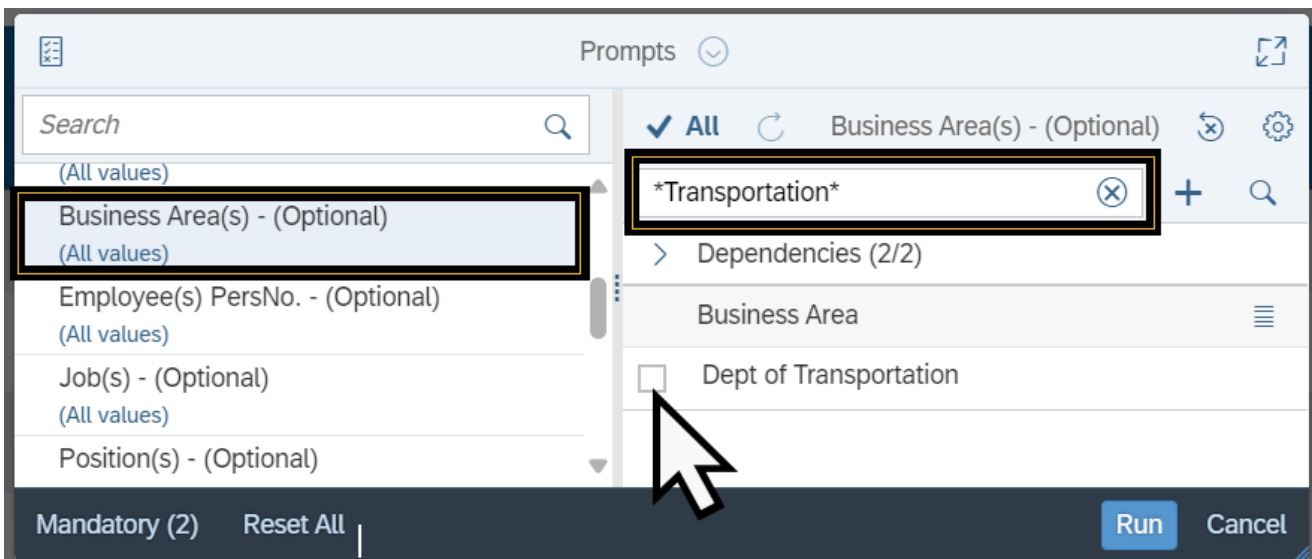
Calendar Filled Date

The Calendar Filled Date selects a date range to compile data for the generated report. Follow the steps below to complete the Calendar Filled Date prompt.

1. Select the **Calendar Filled Date** prompt.

2. Enter the Start date in the **From** field or select the **Start Date** icon and select the date from the calendar.
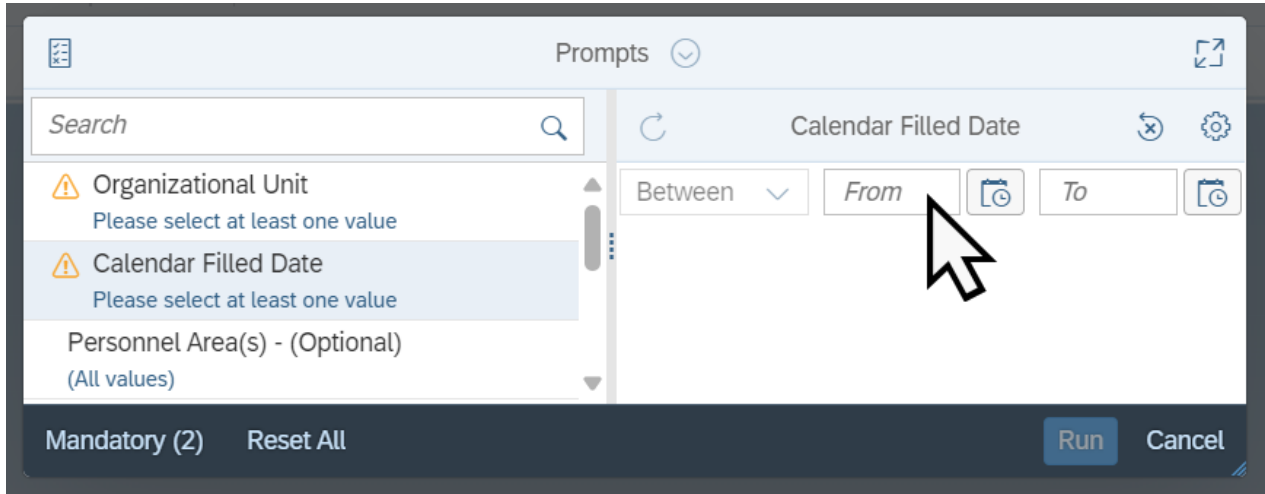
3. Enter the End date in the **To** field or select the **End Date** icon and select the date from the calendar.
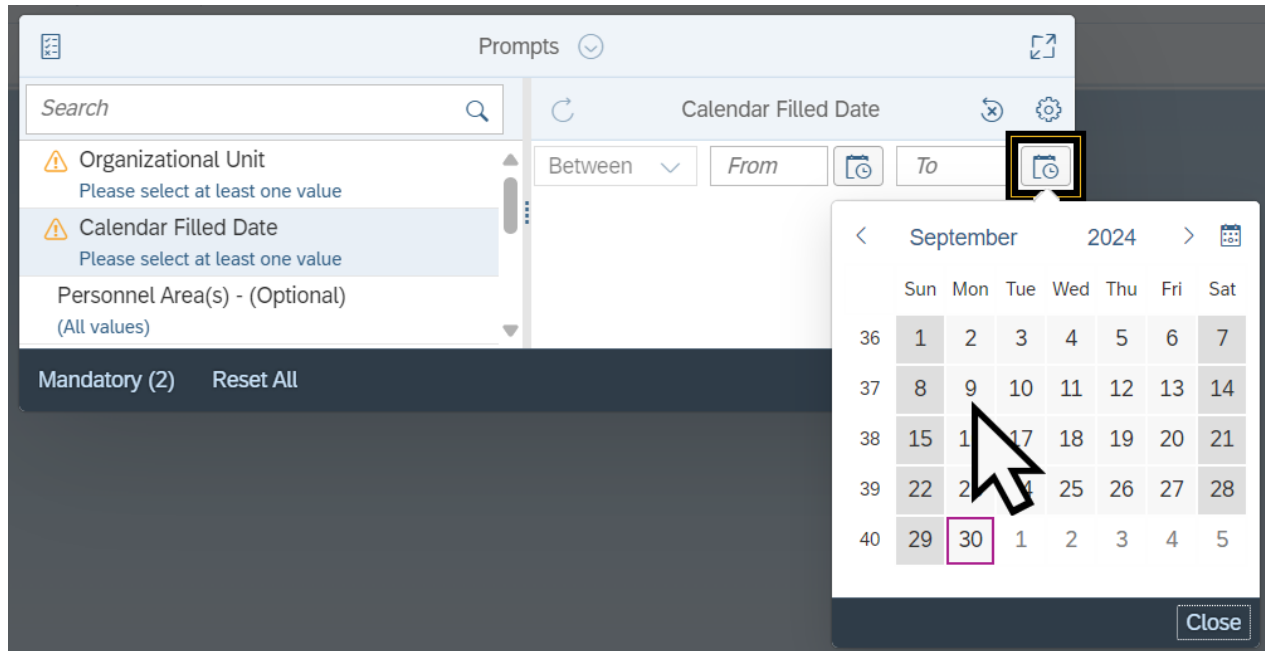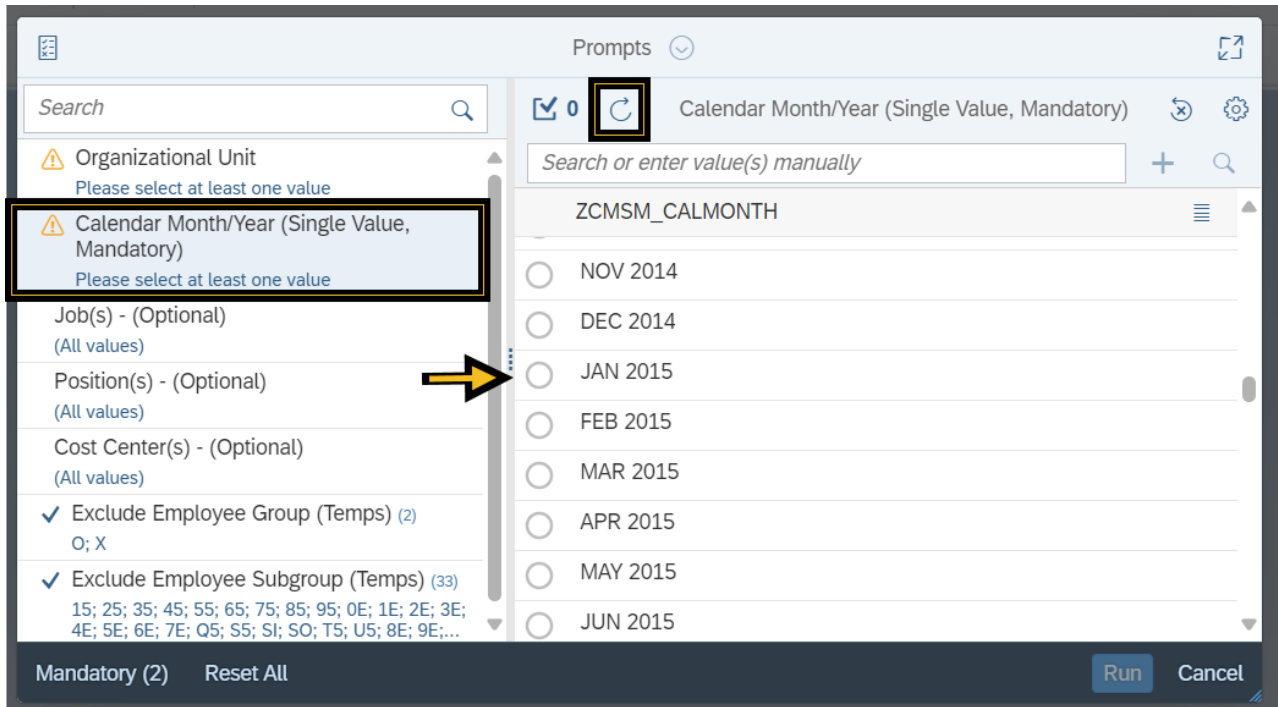
Calendar Month/Year (Single Value)

The Calendar Month/Year (Single Value) prompt selects a single month and year that compiles the data in the report. Follow the steps below to complete the Calendar Month/Year prompt.

1. Select the **Calendar Month/Year (Single Value)** prompt.

2. Click the **Refresh Values** icon ↻ to see the list of months and years.

   a. Alternatively, use the Search field to enter the desired Month and Year combination. Values for the Calendar Month/Year are displayed as the first three letters of the month and then the year, for example JAN 2015. Values are listed as radio buttons.

   Note: Entering a Date Value in the Calendar Month/Year prompt can cause a query error message from the system, or the Run button will be disabled.

3. Select the radio button next to the desired date.

Calendar Qtr/Year (Single Value/Interval)

The Prompt Calendar Qtr/Year (Single Value/Interval) selects a range of yearly quarters to determine the report generation. Follow the steps to complete the Calendar Qtr/Year (Single Value/Interval) Prompt.

1. Select the **Calendar Qtr/Year (Single Value/Interval)** prompt.

2. Click the **Refresh Values** icon ↻ to view the quarter and the year.

    a. Alternatively, use the Search field to enter the desired quarter and the year, then select the Search icon. The format of Quarter/YYYY must be used. For example, the first quarter of 2024 is input as 1/2024.

3. Select the **From** field.

4. Select the desired quarter and year.

5. Select the **To** field.

6. Select the desired quarter and year.
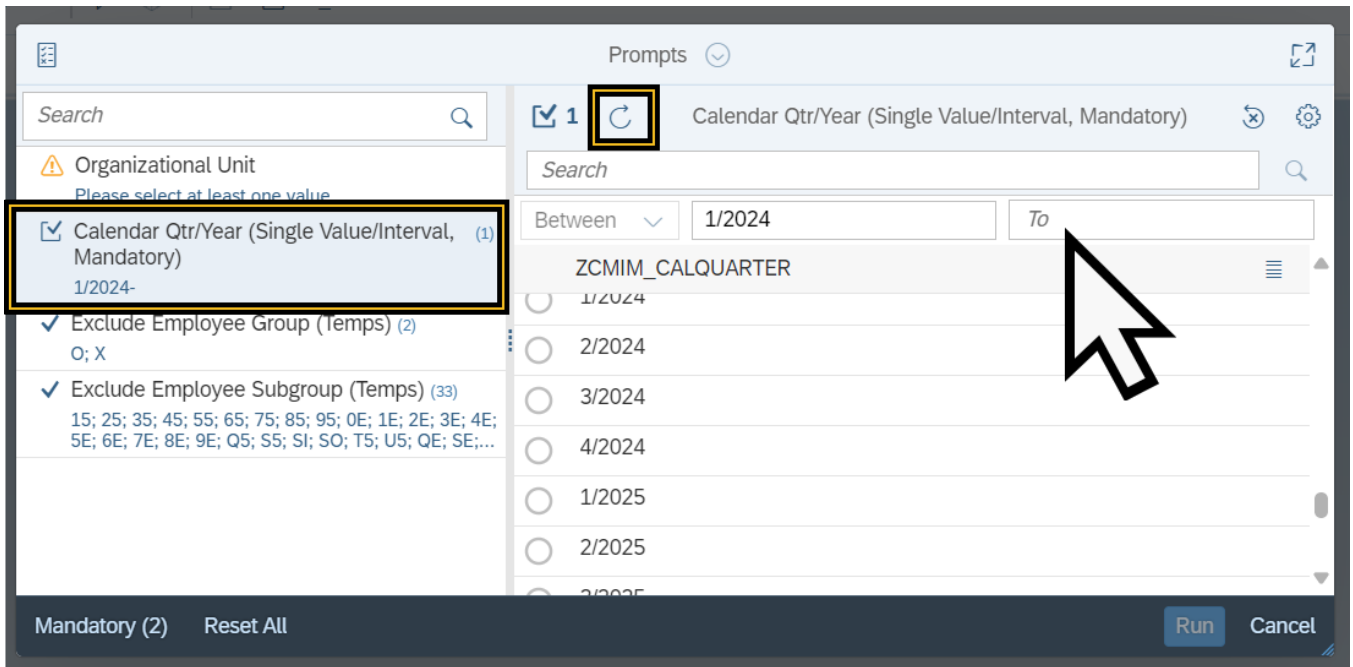
CalMonth/Year (Single Value)

The CalMonth/Year selects a date range to compile data for the generated report. Follow the steps below to complete the CalMonth/Year.

1. Select the **CalMonth/Year** prompt.

2. Click the **Refresh Values** icon ↻ to see the list CalMonth/Year.

    a. Alternatively, use the Search field to enter a specific Month and Year, using the format of the first three letters of the Month in capital letters followed by the year. Then select the search icon.

3. Select the radio button next to the correct Calendar Month and Year.

4. Select the **From** field to populate the Start date in the **From** field.

5. Select the radio button next to the correct Calendar Month and Year.

6. Select the **To** field to populate the End date in the **To** field.
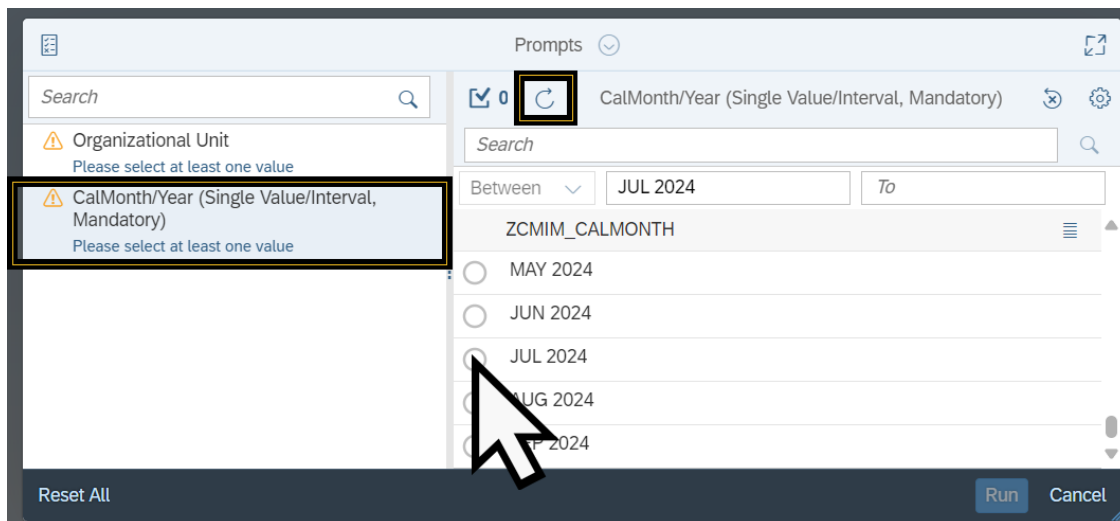
Changed On Date (Single Value/Interval)

The Changed On Date (Single Value/Interval) prompt selects a range of time where a record was changed. This data is then used to generate the report. Follow the steps below to complete the Changed On Date (Single Value/Interval) prompt.

1. Select the **Changed On Date (Single Value/Interval)** Prompt

2. Enter the Start date in the **From** field or select the **Start Date** icon.

3. Select the date from the calendar.

4. Enter the End date in the **To** field or select the **End Date** icon.

5. Select the date from the calendar.
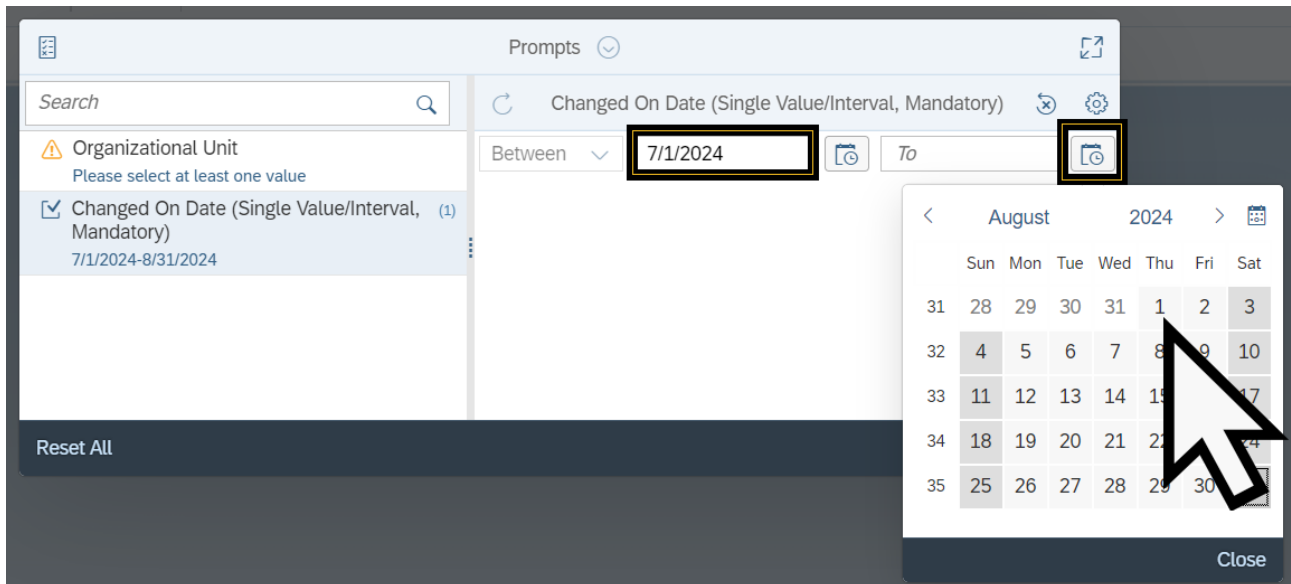
Cost Center(s)

The Cost Center(s) prompt to selects the Cost Center data that compiles the report. Follow the steps below to complete the Cost Center(s).

1. Select the **Cost Center(s)** prompt.

2. Use the Search field to enter the desired Cost Center(s). Wildcards (*) can be used to search for values.

    a. Alternatively, use the settings to toggle the Search by Keys on and enter the Cost Center number into the search field.

3. Click the **Search** Icon (🔍).

4. Select checkbox next to the desired Cost Center.
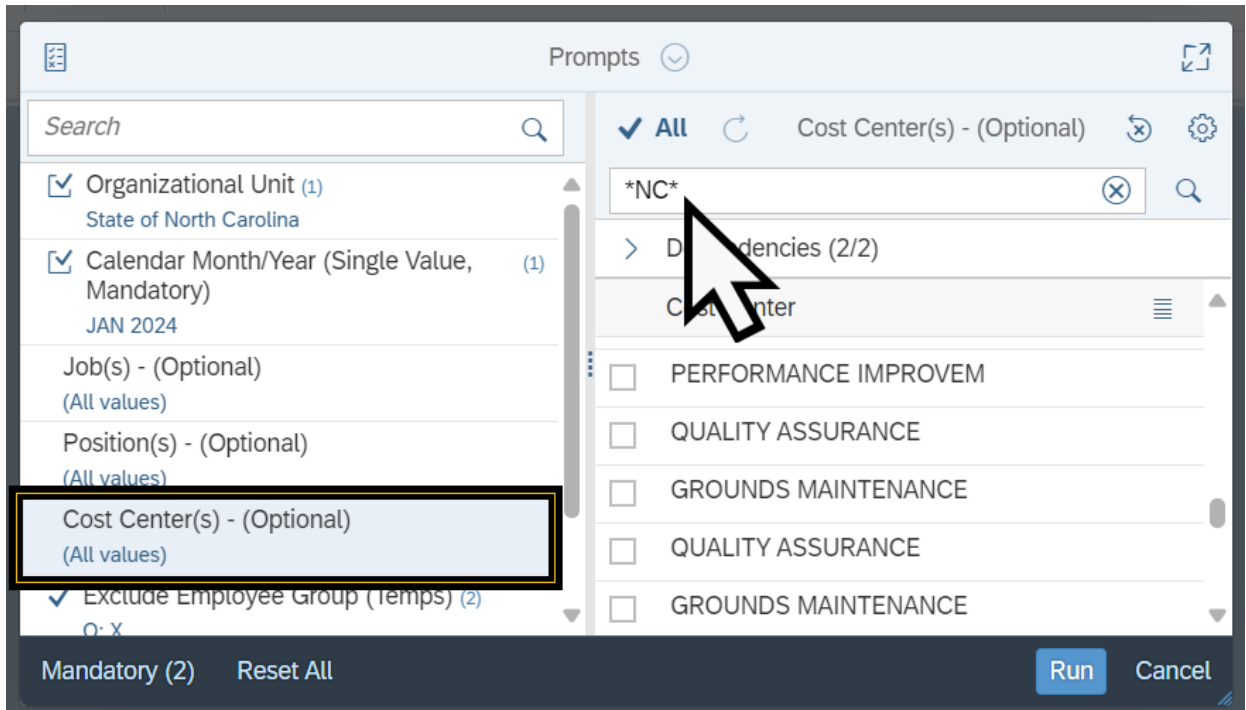
Disability Code(s)

The Disability Code prompt narrows the generated report to include only data that includes the specific disability code entered in the prompt. Follow the steps below to complete the Disability Code prompt.

1. Select the **Disability Code(s)** prompt.

2. Use the Search field to enter the desired Disability Code selection. Wildcards (*) can be used to search for partial values.

3. Click the **Search** Icon 🔍.

4. Select checkbox next to the desired Disability Code.
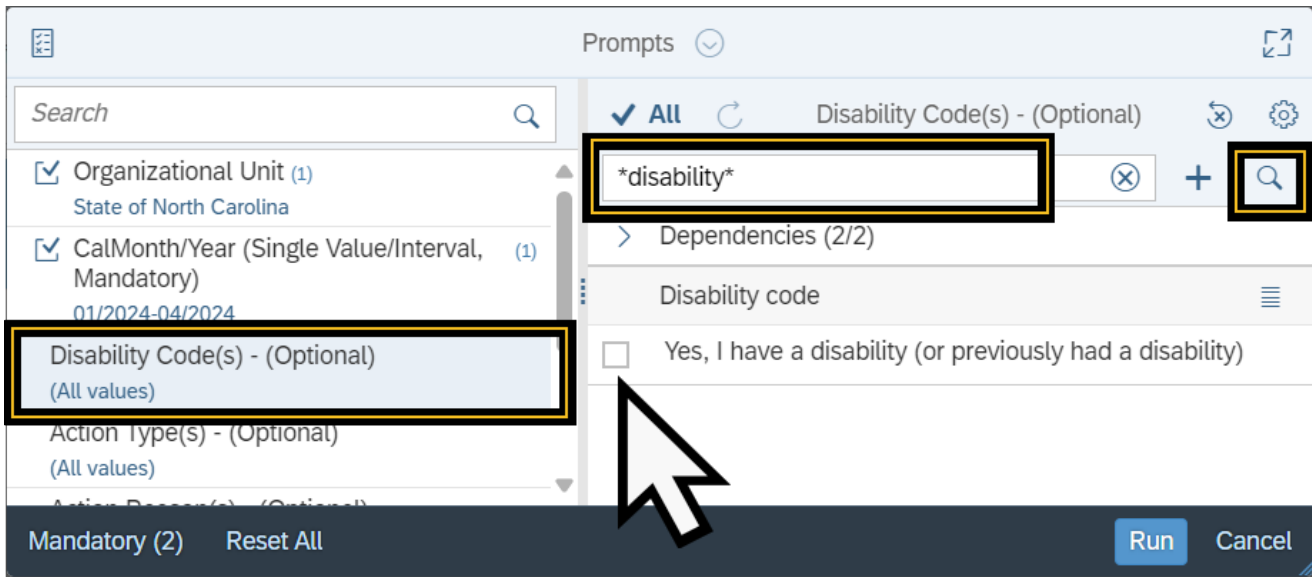
Donor(s) PersNo.

The Donor(s) PersNo. prompt narrows the generated report to include only data that is equal to the Donors selected in the prompt. Follow the steps below to complete the Donor(s) PersNo. prompt.

1. Select the **Donor(s) PersNo.** Prompt.

1. Enter the Donors last name in title case in the Search field.

2. Click the **Search** Icon (🔍).

   a. Alternatively, toggle the Search by Key in the Settings Page. Then enter the Donor's personnel number into the search field and click the Add icon.
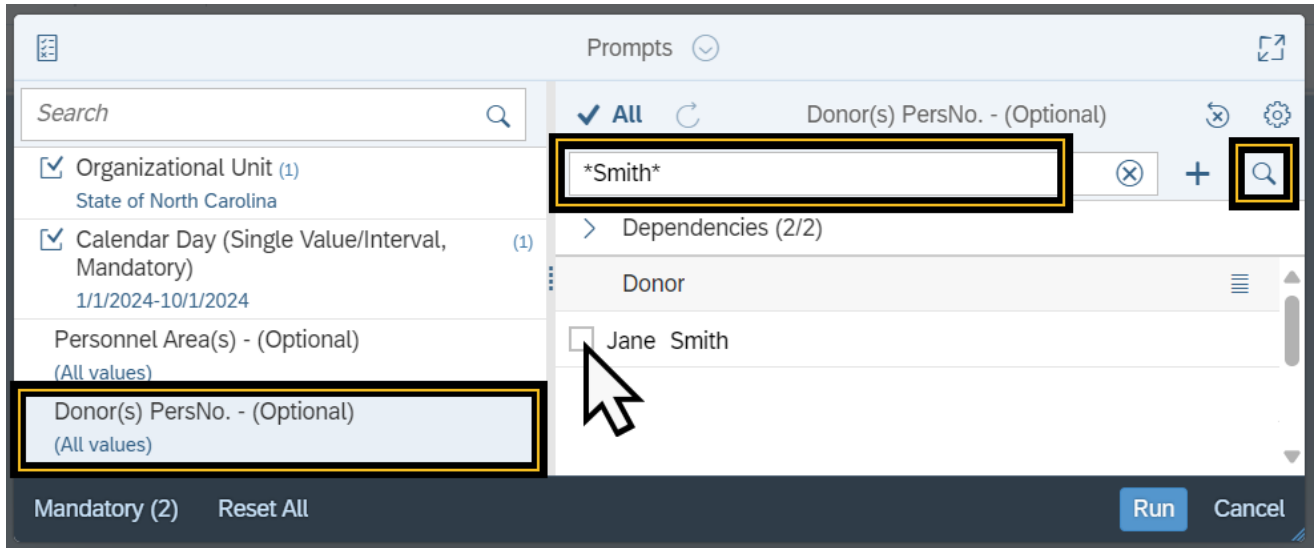
Effective Date

The Effective Date selects a date range to compile data for the generated report. Follow the steps below to complete the Effective Date.

1. Select the **Effective Date** prompt.

2. Enter the Start date in the **From** field or select the **Start Date** icon and select the date from the calendar.
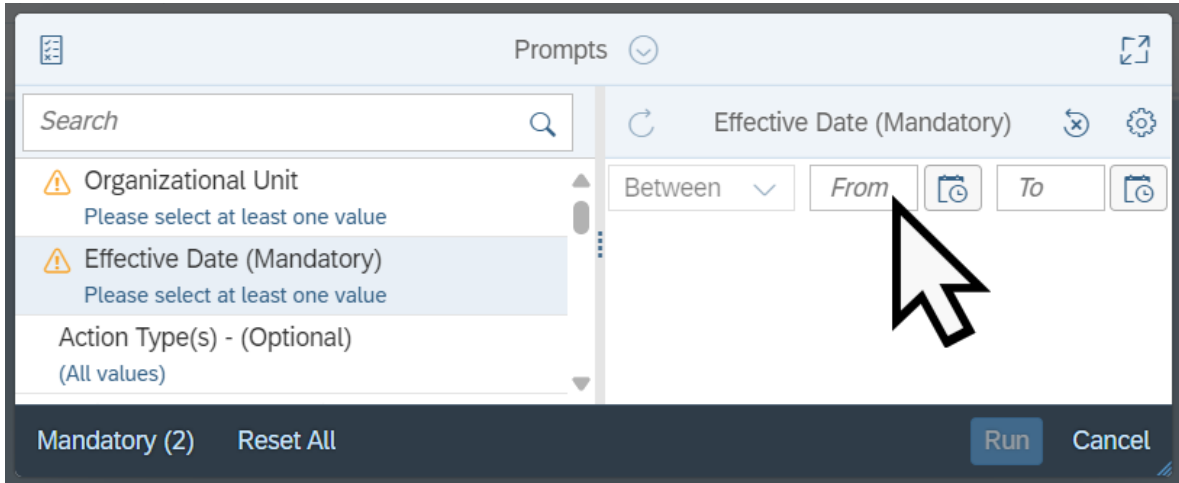

3. Enter the End date in the **To** field or select the **End Date** icon and select the date from the calendar.
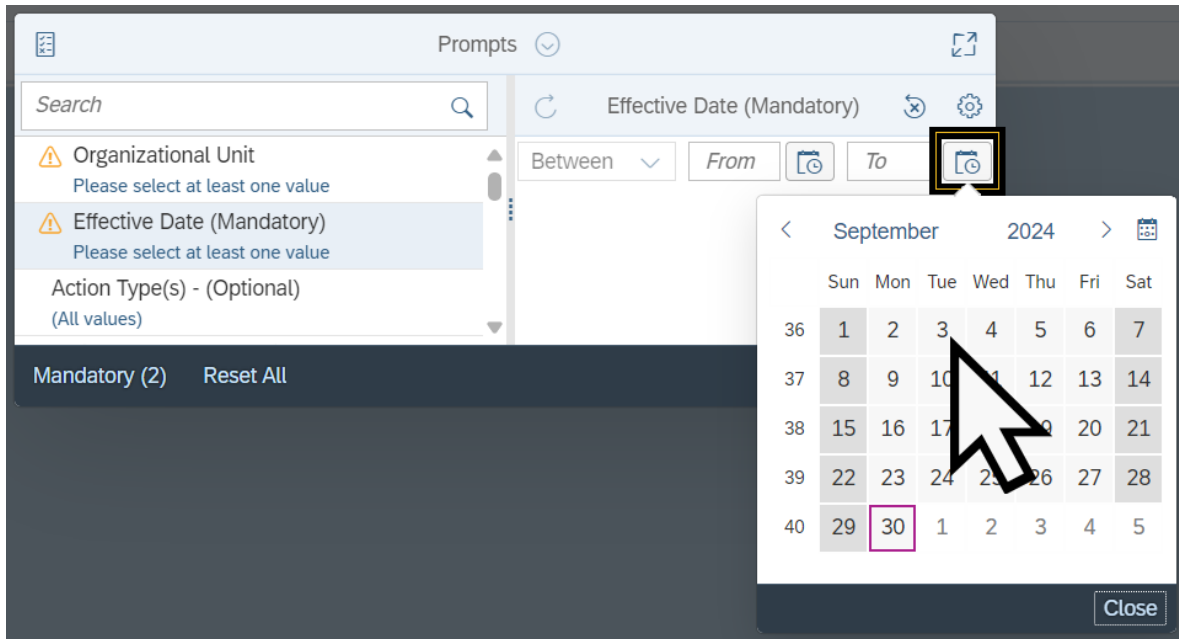
Employee Pay Area(s)

The Employee Pay Area(s) prompt narrows the generated report to include only Employee Pay Areas listed in the selected values. Follow the steps below to complete the Employee Pay Areas prompt.
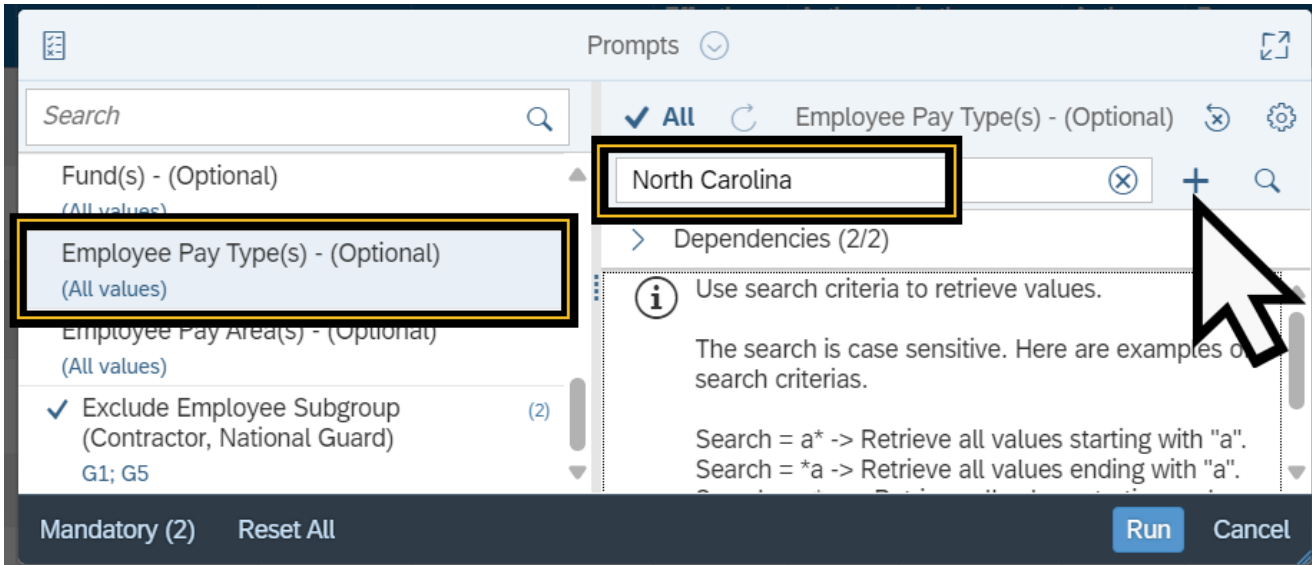
1. Select the **Employee Pay Area(s)** Prompt.

2. Enter the Employee Pay Area in the Search field.

3. Select the **Add** icon (+).

4. Repeat steps 2-3 to add additional employee pay areas.

5. The value will be added to the Selected Value list below the Search field.
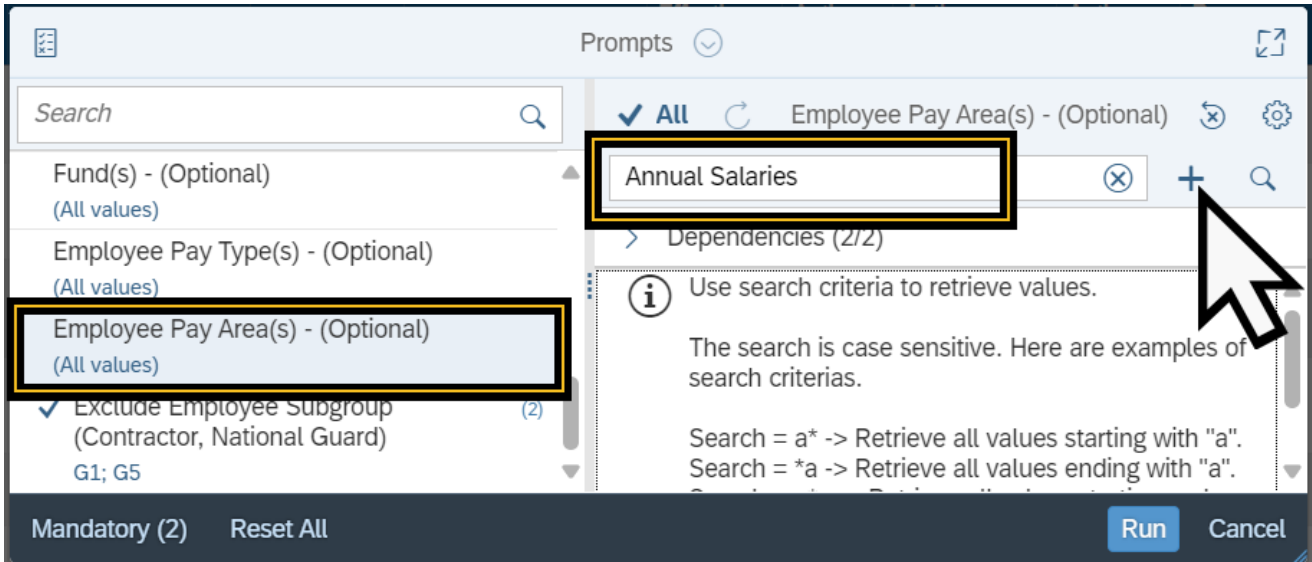
Employee Pay Type(s)

The Employee Pay Type(s) prompt narrows the generated report to include only Employee Pay Types listed in the selected values. Follow the steps below to complete the Employee Pay Type(s) prompt.

1. Select the Employee Pay Type(s) Prompt.

2. Enter the Employee Pay Type in the Search field.

3. Select the **Add** icon (➕).

4. Repeat steps 2-3 to add additional employee pay types.

5. The value will be added to the Selected Value list below the Search field.

Employee(s) PersNo.

The Employee(s) PersNo. prompt selects the employee whose data is used to compile the report. Follow the steps below to complete the Employee(s) PersNo. prompt.

1. Select the **Employee(s) PersNo.** prompt.

2. Enter the Employee's Name in the Search Field or follow steps 3-4.

    a. Alternatively use the wildcard (*) to search for part of the Employee's name.

3. Click the **Search** Icon (🔍).

4. Use the settings to toggle the Search by Keys on.

5. Enter the Employee(s) PersNo. code into the search field.

    a. Alternatively use the wildcard (*) to search for a partial employee personnel number.

6. Click the **Search** Icon (🔍).

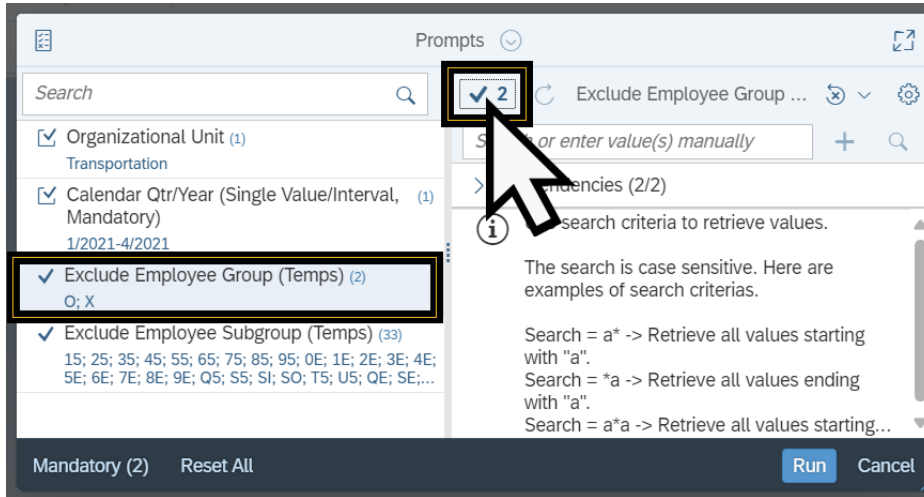7. Select checkbox next to the desired Employee and/or their Personnel Number.
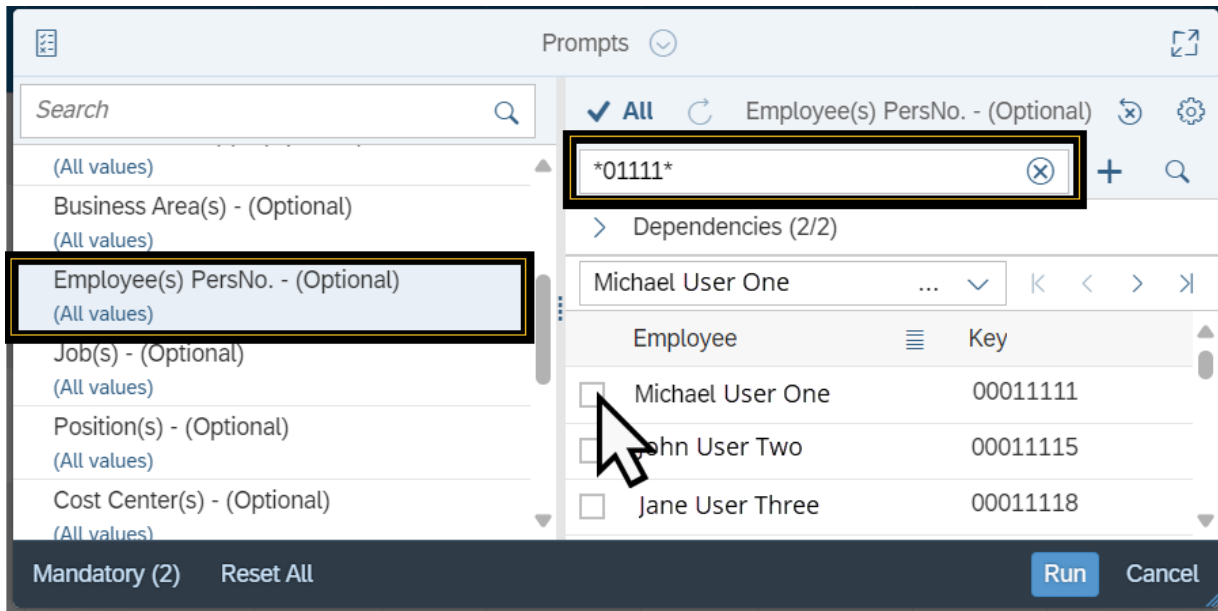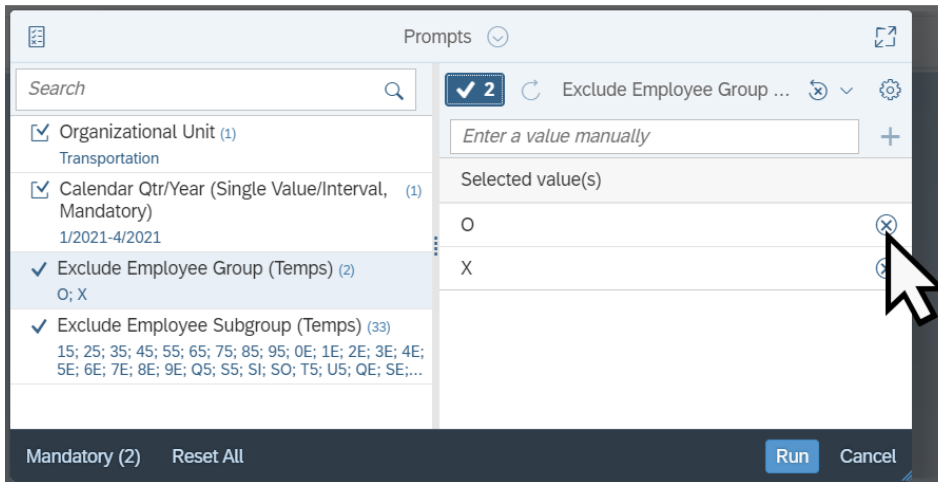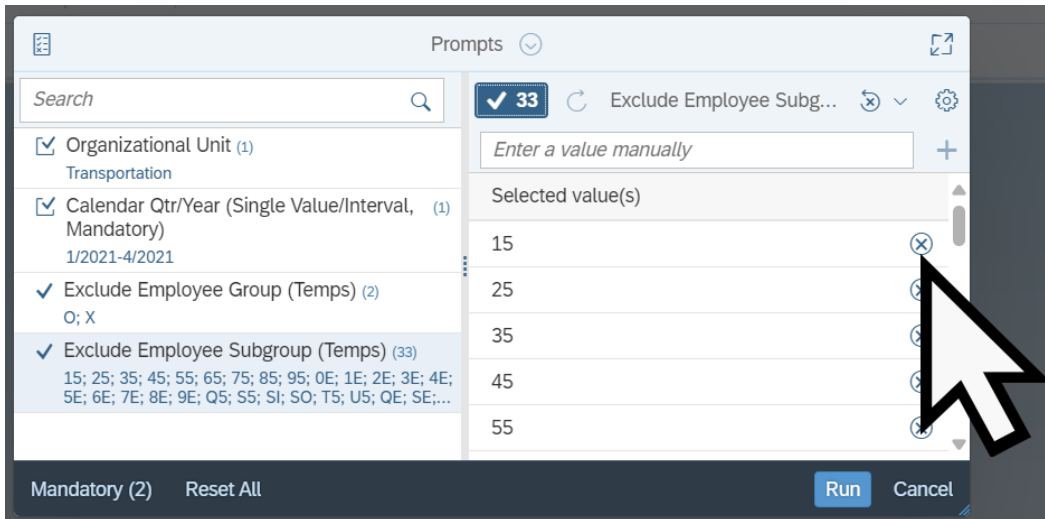
Exclude Employee Group

The Exclude Employee Group prompt is generally prefilled with a specific set of data values. Exclusion prompts remove specified data. Upon report generation any rows containing data values in the Exclude Employee Group prompt will not be retrieved into the report.

Follow the steps to remove values from the Exclude Employee Group prompt.

1. Select the **Exclude Employee Group** prompt.

2. Select the Display Prompt Answers icon(✔ #).

3. Select the **Delete** icon (⊗), to the right of the desired value. This removes the excluded value.


Follow the steps to add values to the Exclude Employee Group prompt.

1. Select the **Exclude Employee Group** prompt.

2. Enter the Employee Group Value into the Search field.

3. Select the **Add** icon (✚).

4. The value will be added to the Selected Value list below the Search field.

Exclude Employee Subgroup

The Exclude Employee Subgroup prompt is generally prefilled with a specific set of data values. Exclusion prompts remove specified data. Upon report generation any rows containing data values in the Exclude Employee Subgroup prompt will not be retrieved into the report.

Follow the steps to remove values from the Exclude Employee Subgroup prompt.

1. Select the **Exclude Employee Subgroup** prompt.

2. Select the Display Prompt Answers icon(✔ #).
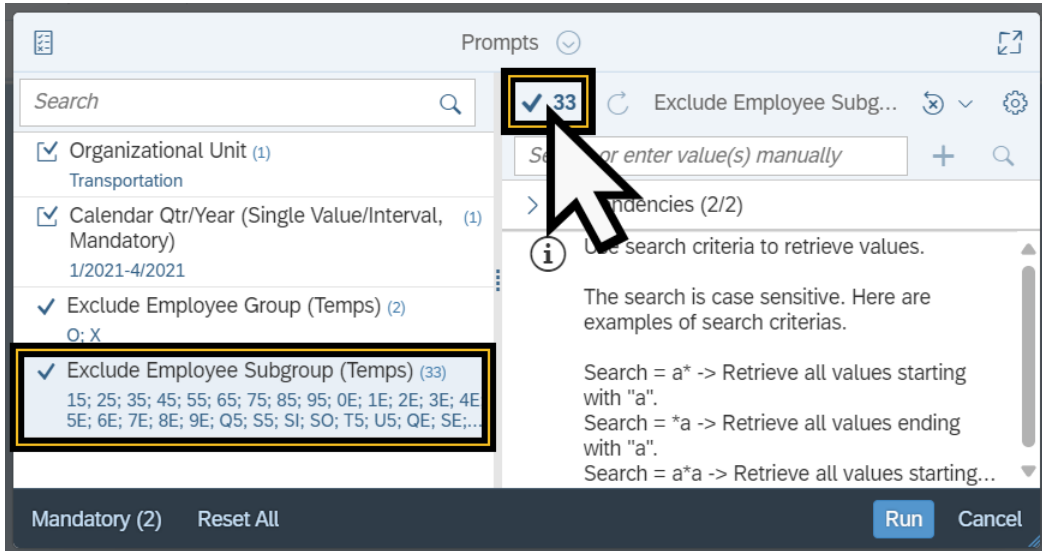
3. Select the **Delete** icon (⊗), to the right of the desired value. This removes the excluded value.

Follow the steps to add values to the Exclude Employee Group prompt.

1. Select the **Exclude Employee Group** prompt.

2. Enter the Employee Group Value into the Search field.

3. Select the **Add** icon (+).

4. The value will be added to the Selected Value list below the Search field.

Financial Key(s)

The Financial Key(s) prompt narrows the generated report to include only Financial Keys listed in the selected values. Follow the steps below to complete the Financial Key(s) prompt.
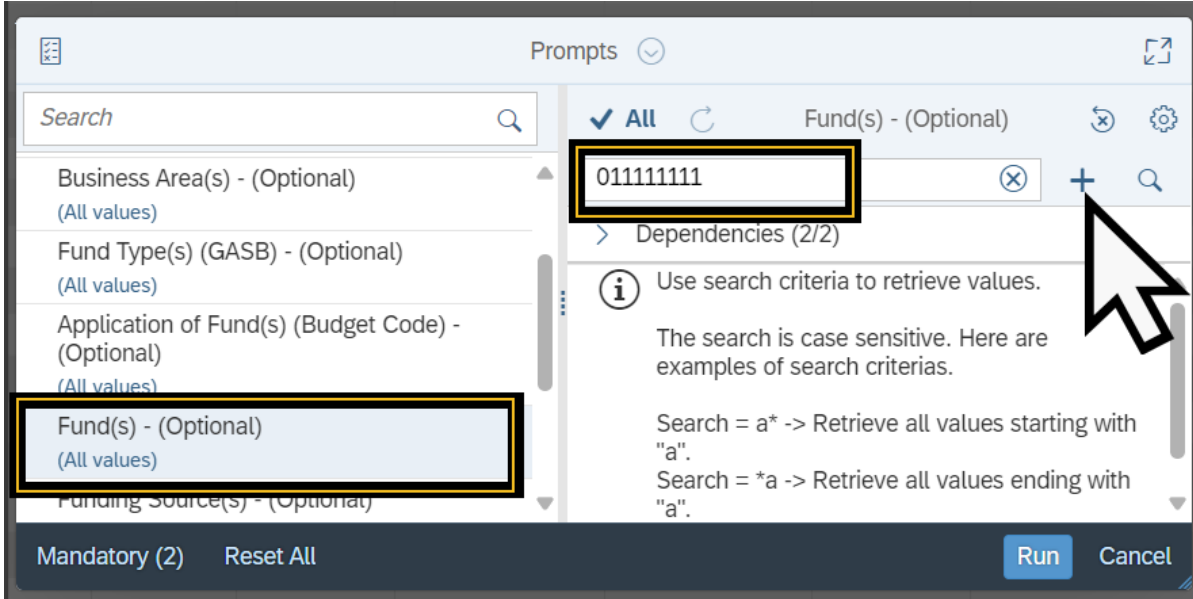
1. Select the **Financial Key(s)** Prompt.

2. Enter the Financial Key(s) number in the Search field.

3. Select the **Add** icon (✛).

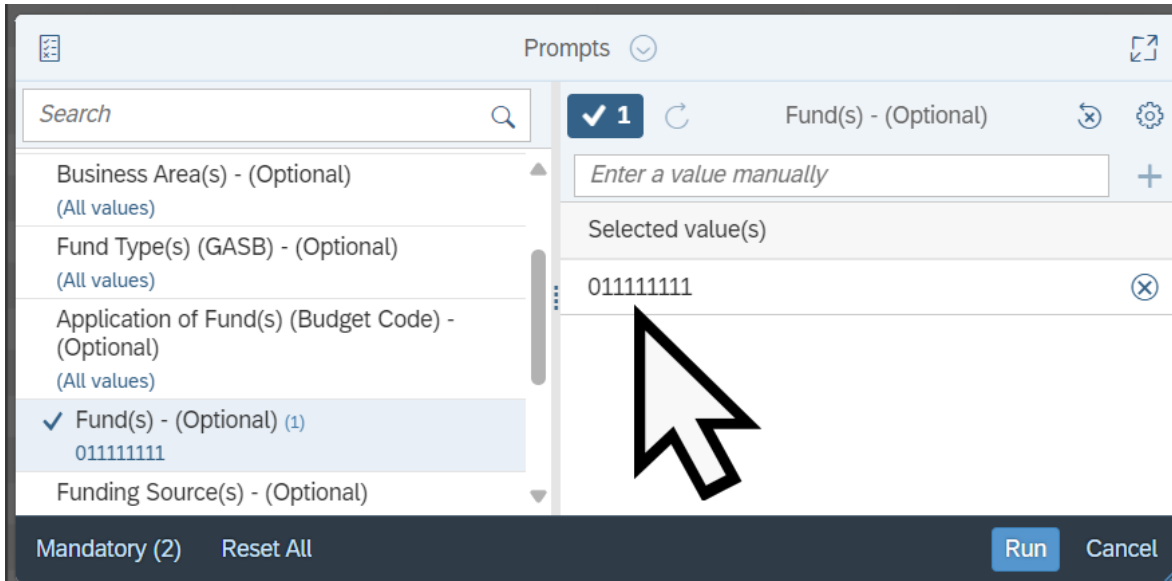4. The value will be added to the Selected Value list below the Search field.
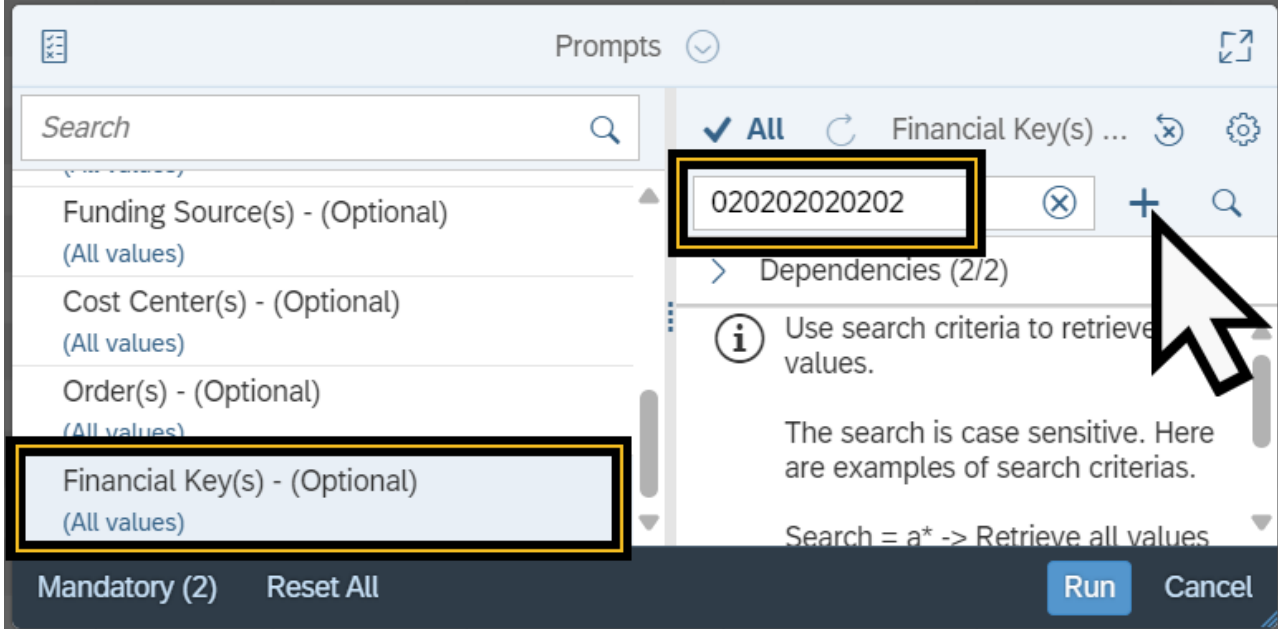
Fund(s)

The Fund(s) prompt narrows the generated report to include only Funds listed in the selected values. Follow the steps below to complete the Fund(s) prompt.

1. Select the **Fund(s)** Prompt.

2. Enter the Fund code in the Search field.

3. Select the **Add** icon (➕).

4. The value will be added to the Selected Value list below the Search field.

Funding Source(s)

The Application of Funding Source(s) prompt narrows the generated report to include only Funding sources listed in the selected values. Follow the steps below to complete the Funding Source(s) prompt.

1. Select the **Funding Source(s)** Prompt.

2. Enter the Funding Source(s) code in the Search field.

3. Select the **Add** icon (✚).
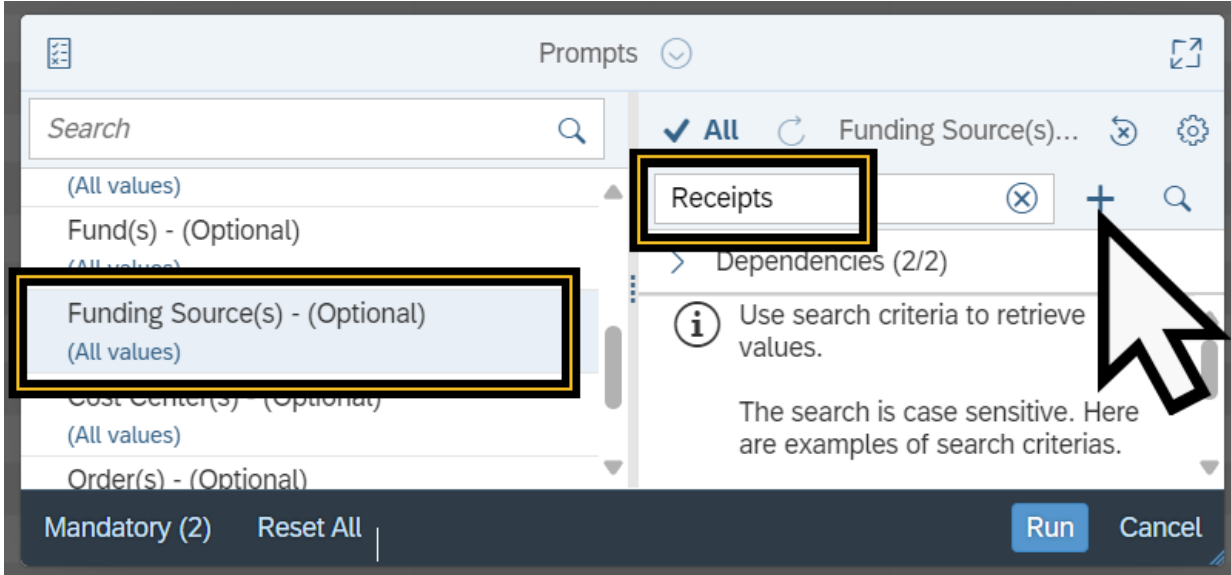
4. The value will be added to the Selected Value list below the Search field.
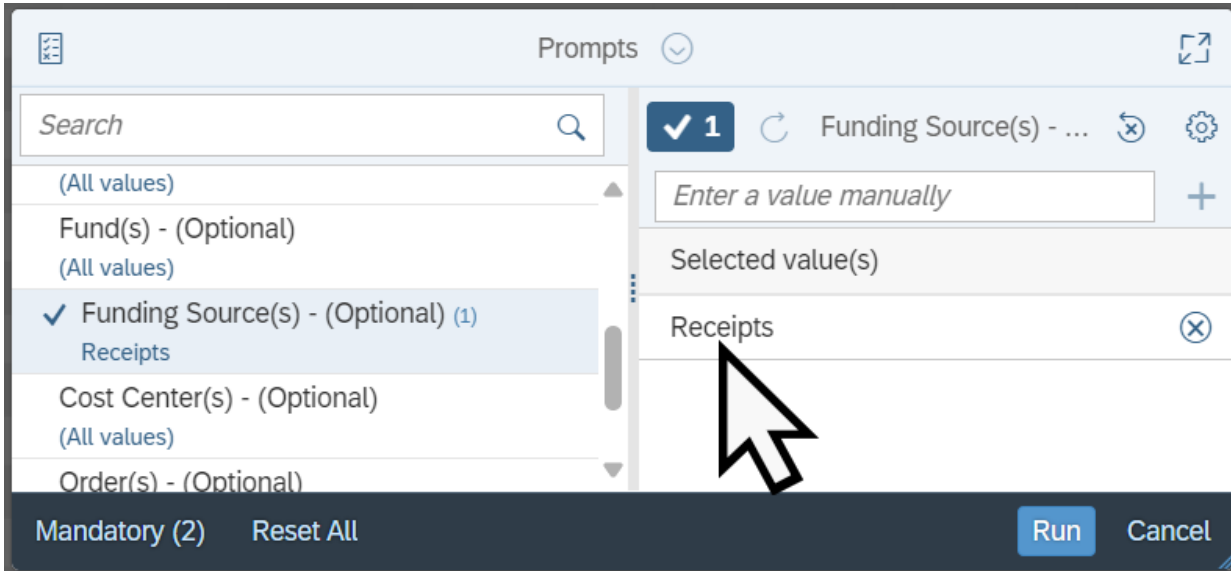
Fund Type(s) (GASB)

The Fund Type(s) (GASB) prompt locates specific fund types. This prompt can be populated by searching for the fund name or by searching for the fund code. The fund code is the key. Toggling on the Search by Keys Setting will allow for the search to be done by key verses the text name. Follow the steps below to complete the Fund Type(s) (GASB) Prompt.

1. Select the **Fund Type(s) (GASB)** Prompt.

2. Enter the Fund Type in the Search field.

3. Select the **Add** icon (**+**).
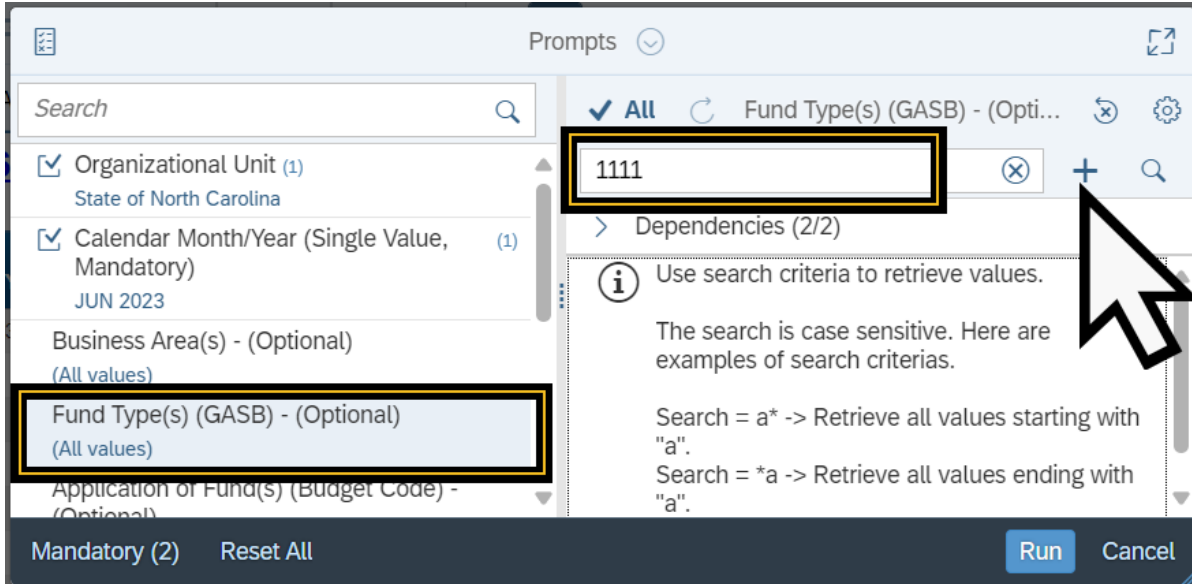
4. If only part of the Fund name or code is known use the wildcards (*) to search.

5. The value will be added to the Selected Value list below the Search field.
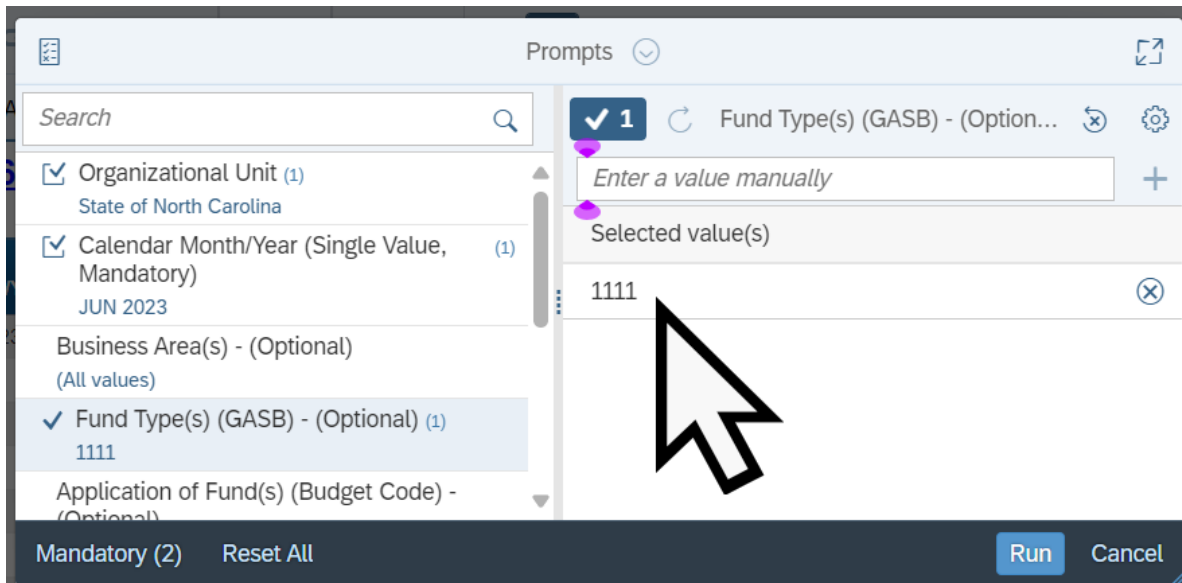
Job(s)

The Job(s) prompt selects Job data to compile the report. Follow the steps below to complete the Job(s) prompt.
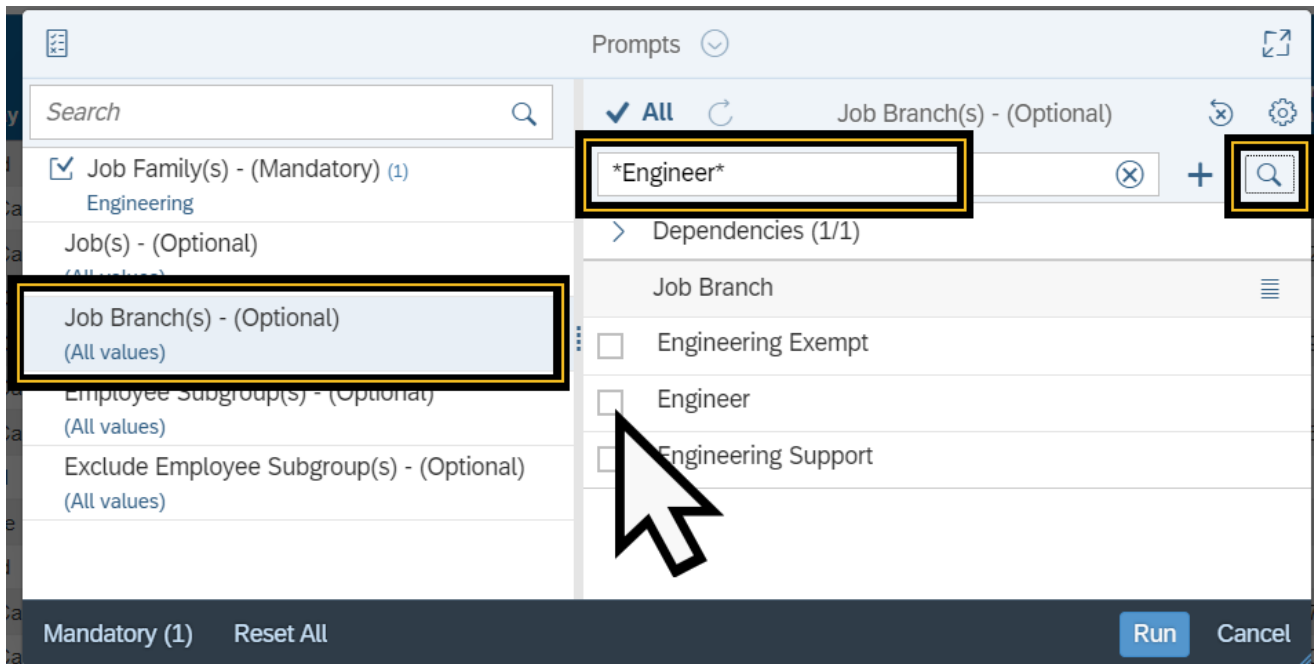
1. Select the **Job(s)** prompt.

2. Use the Search field to enter the desired Job name. Wildcards (*) can be used to search for values.

   a. Alternatively, use the settings to toggle the Search by Keys on and enter the Job number into the search field.

3. Click the **Search** Icon (🔍).

4. Select checkbox next to the desired Job(s).
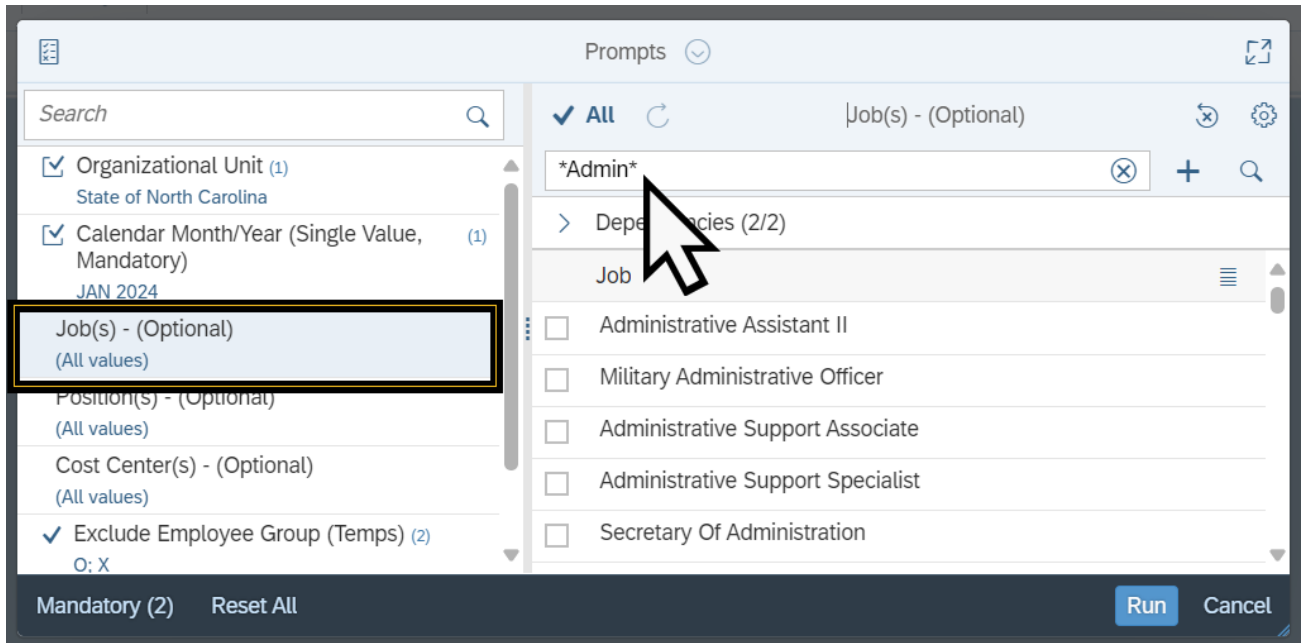
Job Branch

The Job Branch prompt selects Job Branch data to compile the report. Follow the steps below to complete the Job Branch prompt.

1. Select the **Job Branch(s)** prompt.

2. Use the Search field to enter the desired Job Branch. Wildcards (*) can be used to search for partial values.

3. Click the Search Icon 🔍.

4. Select checkbox next to the desired Job Branch(s).

Job Family(s)

The Job Family(s) prompt selects the Job Family to compile the report data. Follow the steps below to complete the Job Family prompt.
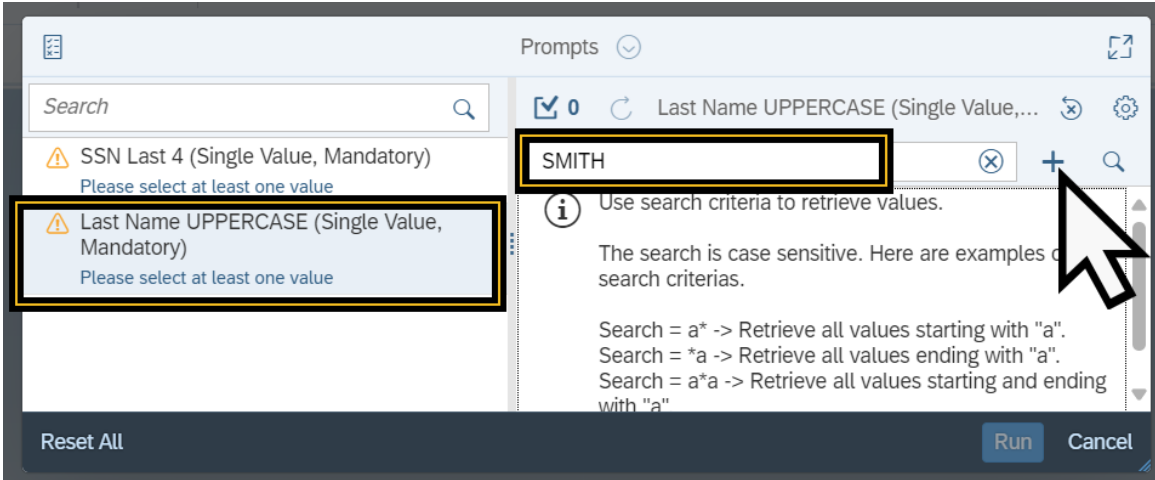
1. Select the **Job Family(s)** prompt.

2. Click the Refresh Values icon (↻) to see the list of Job Families.

    a. Alternatively, use the Search field to enter the desired Job Family, then select the search icon (🔍).

3. Select the check box next to the desired Job Family.
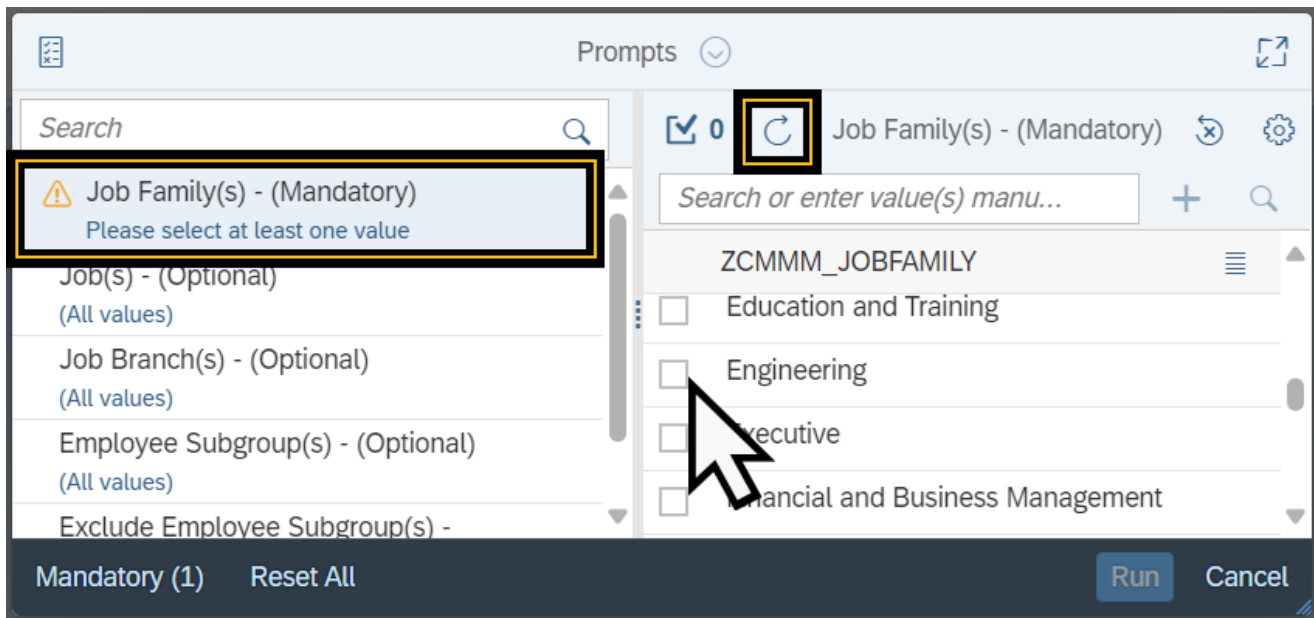
Last Name UPPERCASE (Single Value)

The Last Name UPPERCASE (Single Value) prompt locates individuals based on their last name. This prompt is case sensitive and requires that any searched value be in Upper case. Any searches for last names in title case or lower case will not return any results. Follow the steps below to complete the Last Name UPPERCASE (Single Value) Prompt.

1. Select the **Last Name UPPERCASE** (Single Value) Prompt.

2. Enter the Last Name, using all uppercase letters, in the Search field.

3. Select the **Add** icon (+).

4. If only part of the last name is known use the wildcards (*) to search for the last name.

5. Click the Search Icon (🔍).

6. The value will be added to the Selected Value list below the Search field.
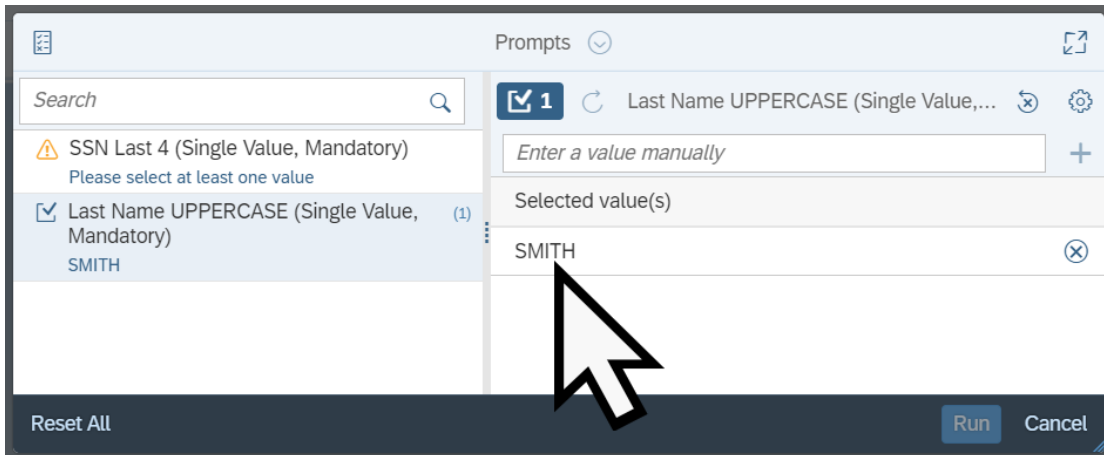
LI Effective Year

The LI Effective Year prompt selects the year where a legislative increase took effect and compiles the report from that data. Follow the steps below to complete the LI Effective Year prompt.

1. Select the **LI Effective Year** prompt.

2. Click the **Refresh Values** icon ↻ to see the list of years when a Legislative Increase took effect.

   a. Alternatively, use the Search field to enter the desired year, then select the Search icon (🔍).

3. Select the check box next to the desired Year.
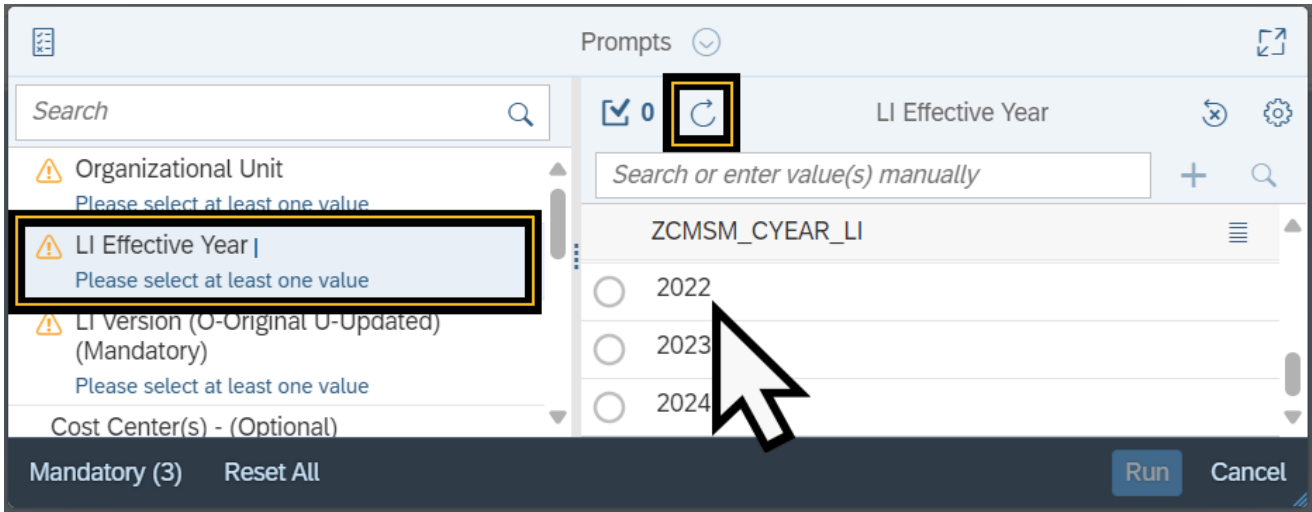
LI Version (O-Original U-Updated)

The LI Version (O-Original U-Updated) prompt selects if a LI Version is original or updated to compile the report data. Follow the steps below to complete the LI Version (O-Original U-Updated) prompt.

1. Select the **LI Version (O-Original U-Updated)** prompt.

2. Click the **Refresh Values** icon ↻ to see the list Original or Updated options.

3. Select the check box next to the desired LI version option.
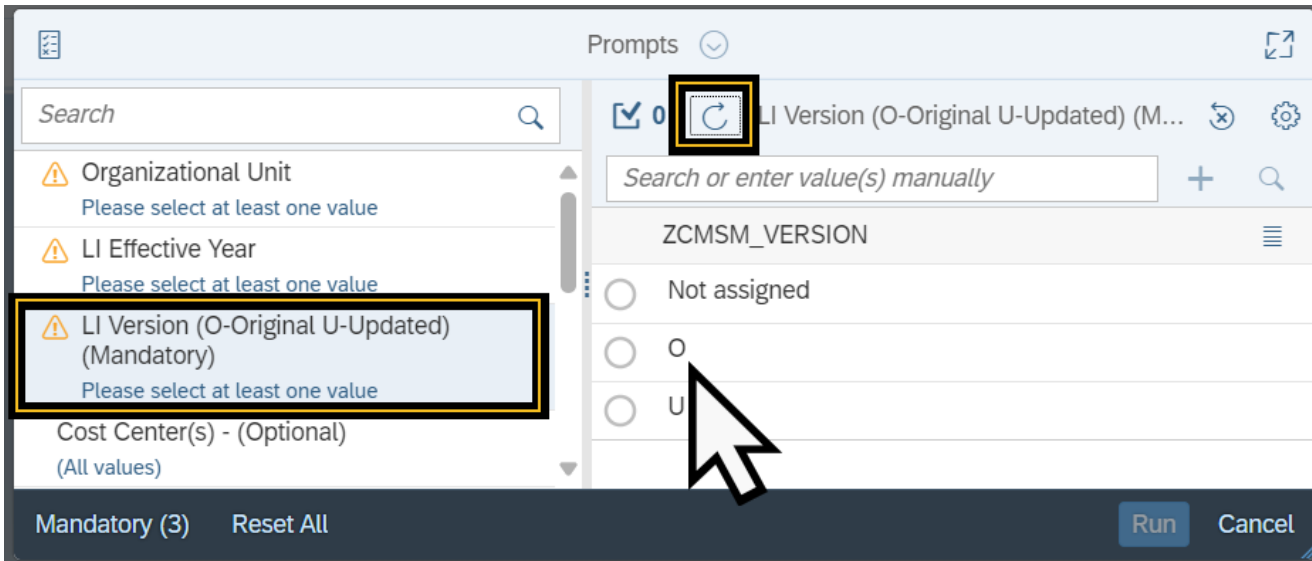
Min# Days Retro

The Min# Days Retro prompt narrows the generated report to include only data that are equal to the minimum number of days retroactive. Follow the steps below to complete the Min# Days Retro prompt.

1. Select the **Min# Days Retro** Prompt.

2. Enter the number of minimum days retroactive in the Search field.

3. Select the **Add** icon (➕).

4. The value will be added to the Selected Value list below the Search field.
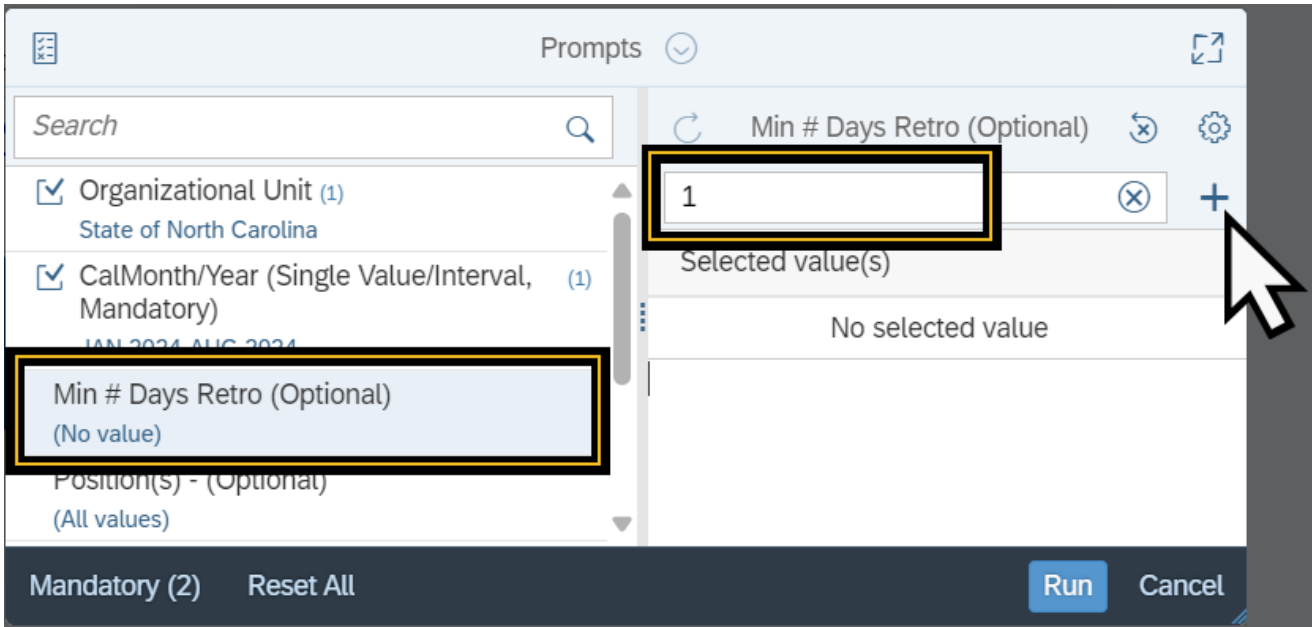
Order(s)

The Order(s) prompt narrows the generated report to include only orders listed in the selected values. Follow the steps below to complete the Order(s) prompt.
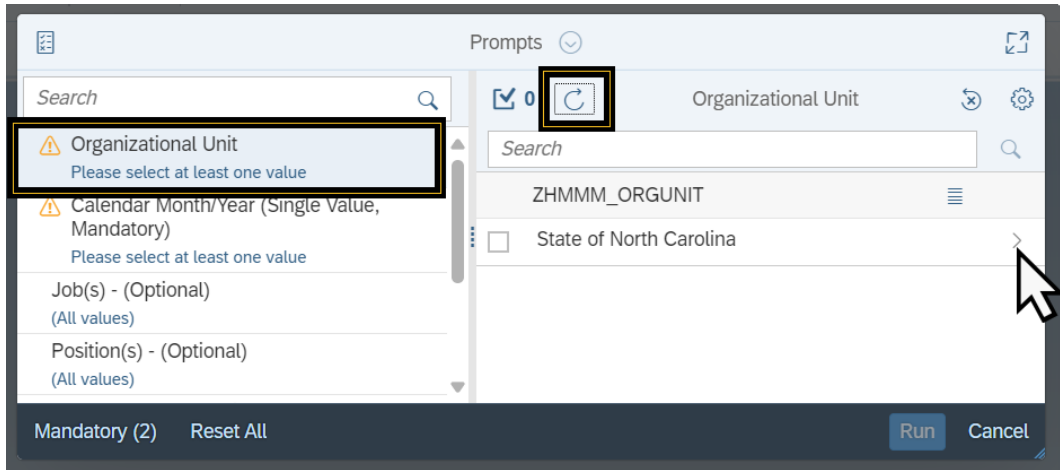
1. Select the **Order(s)** Prompt.

2. Enter the Order(s) number in the Search field.

3. Select the **Add** icon (➕).

4. The value will be added to the Selected Value list below the Search field.
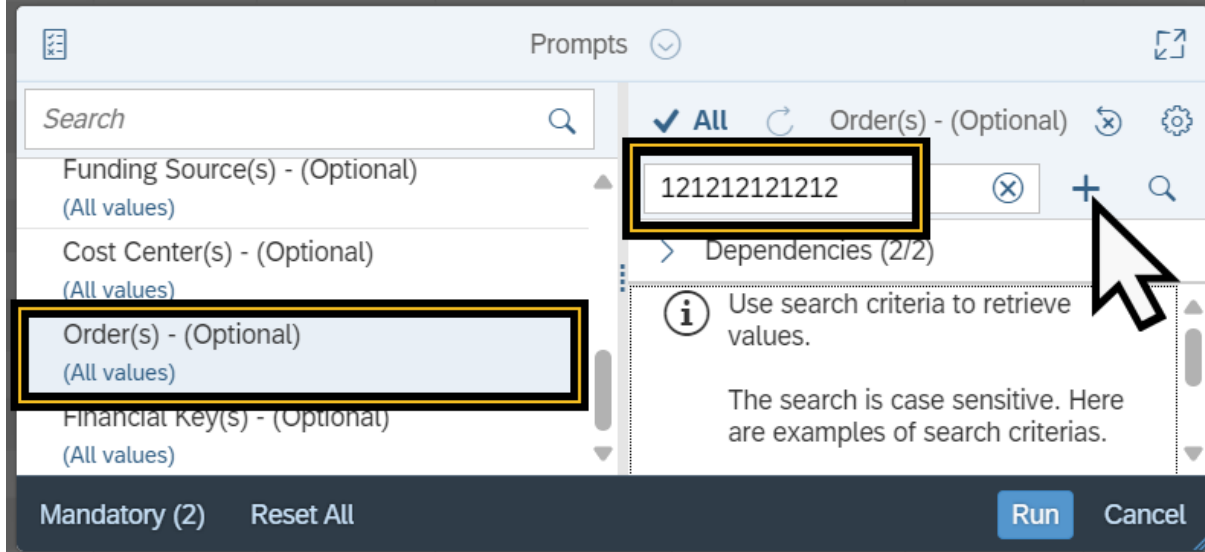
Organizational Unit

The Organizational Unit prompt selects the organizational unit that compiles the report data. Follow the steps below to complete the Organizational Unit prompt.

5. Select the **Organizational Unit** prompt.

6. Click the **Refresh Values** icon $\circlearrowleft$ to see the list of Organizational Units.

    a. Alternatively, use the Search field to enter the desired Organizational Unit, then select the Search icon (Q).

7. Click the expand node to view additional Organizational Units.

8. Select the check box next to the desired Organizational Unit.
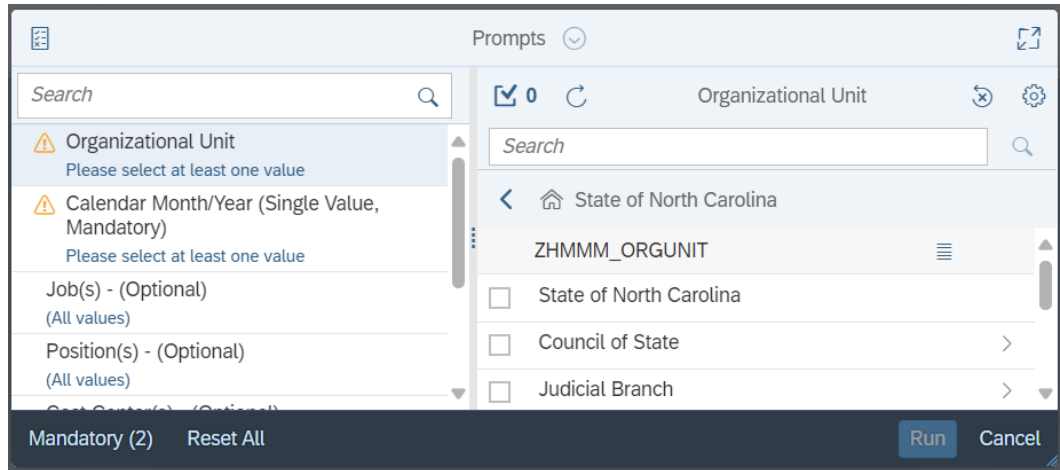
Payout Period(s)

The Payout Period(s) prompt narrows the generated report to include only Payout Periods listed in the selected values. Follow the steps below to complete the Payout Periods prompt.

1. Select the **Payout Period(s)** Prompt.

2. Enter the Payout Period in the Search field.

3. Select the Add icon (**+**).

4. Repeat steps 2-3 to add additional periods.

5. The value will be added to the Selected Value list below the Search field.
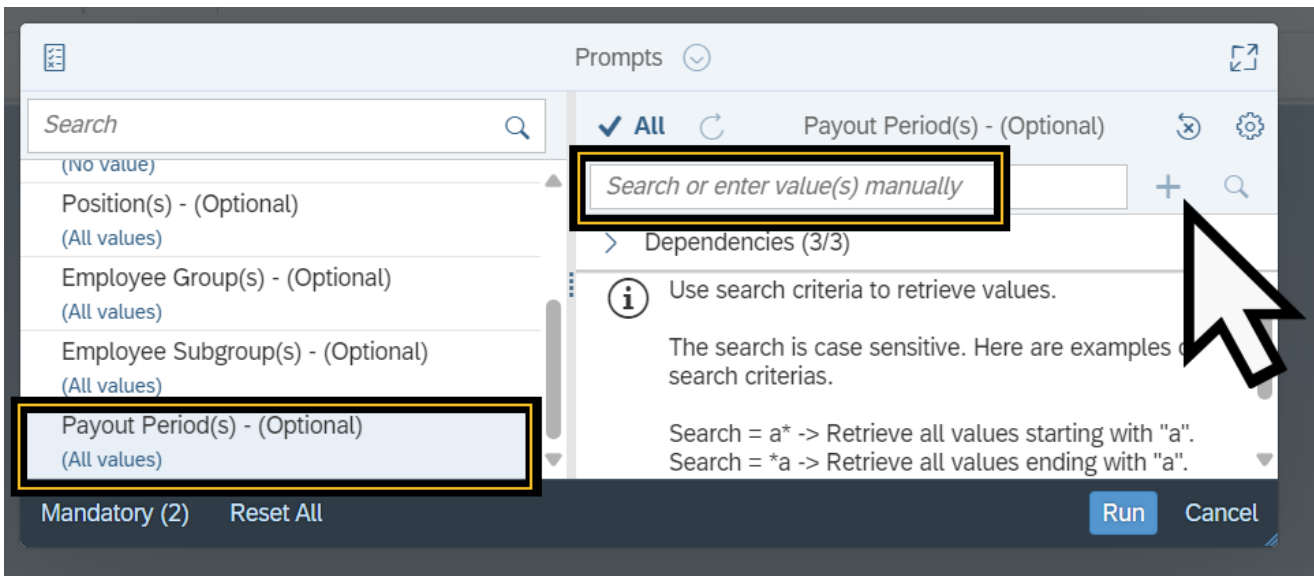
Personnel Area(s)

The Personnel Area(s) prompt selects personnel areas to compile the report. Follow the steps below to complete the Personnel Area(s) prompt.
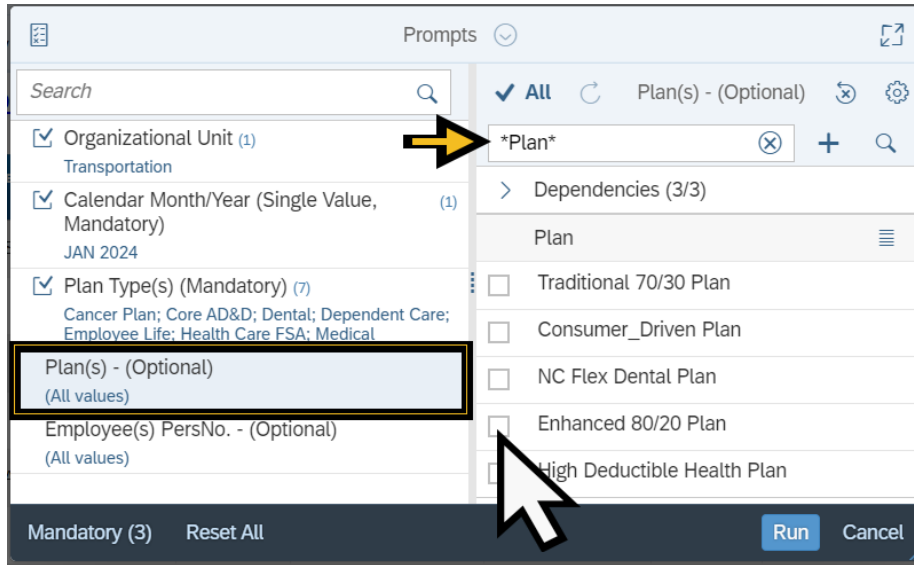
1. Select the **Personnel Area(s)** prompt.

2. Use the Search field to enter the desired Personnel Area(s). Wildcards (*) can be used to search for values.

    a. Alternatively, use the settings to toggle the Search by Keys on and enter the Personnel Area(s) number into the search field.

3. Click the **Search** Icon (🔍).

4. Select checkbox next to the desired Personnel Area(s).
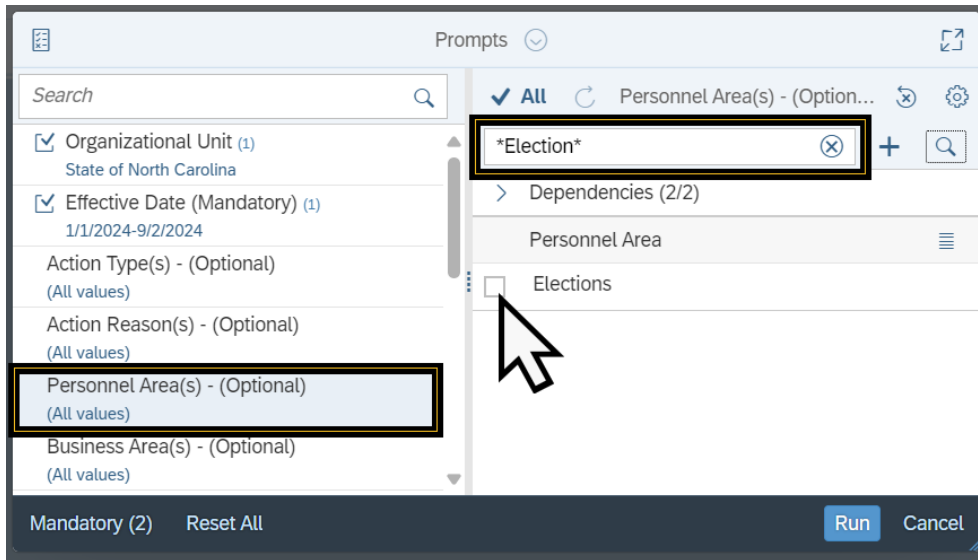
Plan(s)

The Plan(s) prompt selects the benefit plans that are compiled in the report data. Follow the steps below to complete the Plan(s) prompt.

1. Select the **Plan(s)** prompt.

2. Enter the specific desired benefit plan into the Search field. Wildcards (*) can be used to search for partial plan names.

3. Click the **Search** Icon (Q).
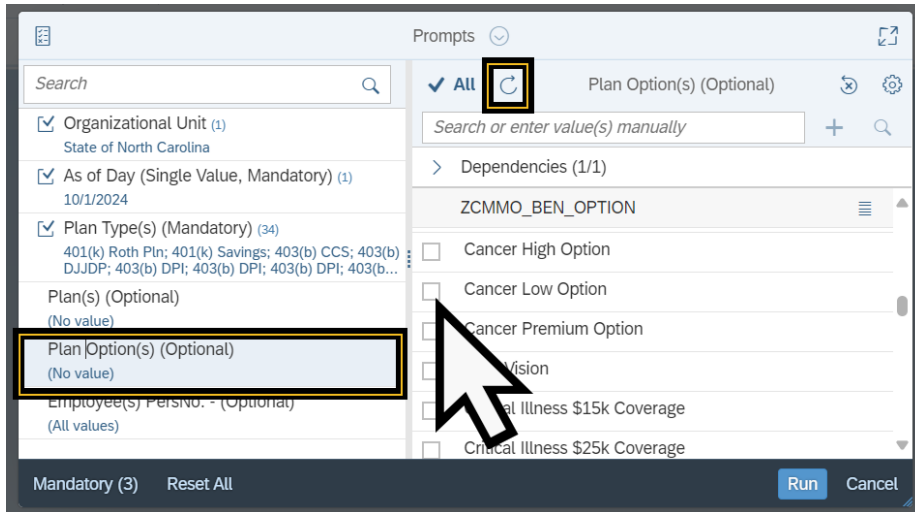
4. Select the check box(es) next to the desired Plan.

NOTE: Many of the benefit plans and benefit plan options have the same text values. Use the Settings icon to toggle on Show keys, to distinguish between the values.
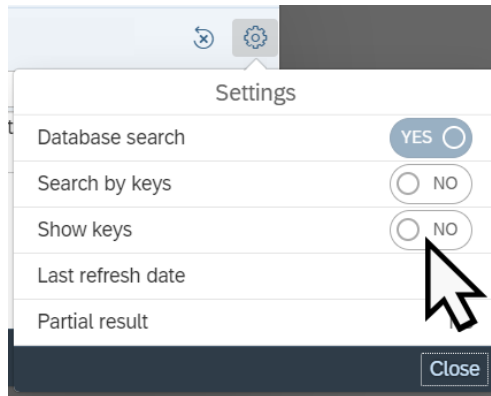
Plan Option(s)

The Plan Option(s) prompt selects the specific options within a benefit plan and generates the report data based on those values. Follow the steps below to complete the Plan Options(s) prompt.

1. Select the **Plan Option(s)** prompt.

2. Click the **Refresh Values** icon ↻ to see the list of specific options within a benefit plan.

    a. Alternatively, use the Search field to enter the specific option within a benefit plan, then select the Search icon (🔍).

3. Select the check box(es) next to the desired Benefit Plan Option(s).

NOTE: Many of the benefit plans and benefit plan options have the same text values. Use the Settings icon to toggle on Show keys, to distinguish between the values.
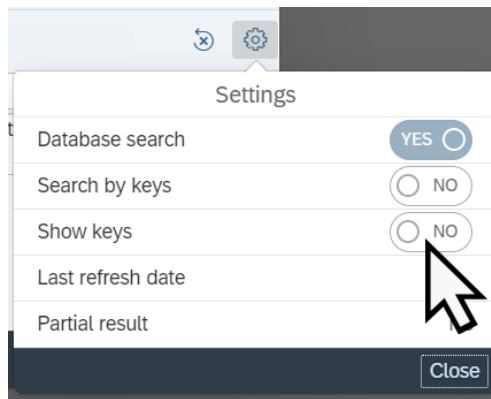
Plan Type(s)

The Plan Type(s) prompt selects the benefit plan types that are compiled in the report data. Follow the steps below to complete the Plan Type(s) prompt.

1. Select the **Plan Type(s)** prompt.

2. Click the **Refresh Values** icon ↻ to see the list of benefit plan types.

3. Alternatively, use the Search field to enter the desired benefit plan, then select the Search icon (🔍).

4. Select the check box(es) next to the desired Plan Type(s).
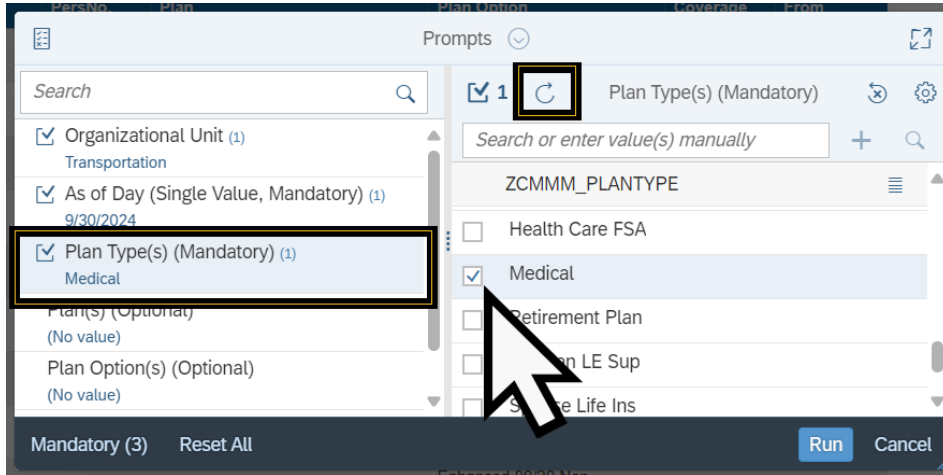
Position(s)

The Position(s) prompt selects position data to compile the report. Follow the steps below to complete the Position(s) prompt.

1. Select the **Position(s)** prompt.

2. Use the Search field to enter the desired Position name. Wildcards (*) can be used to search for values.

   a. Alternatively, use the settings to toggle the Search by Keys on and enter the position number into the search field.

3. Click the **Search** Icon (🔍).

4. Select checkbox next to the desired Position(s).
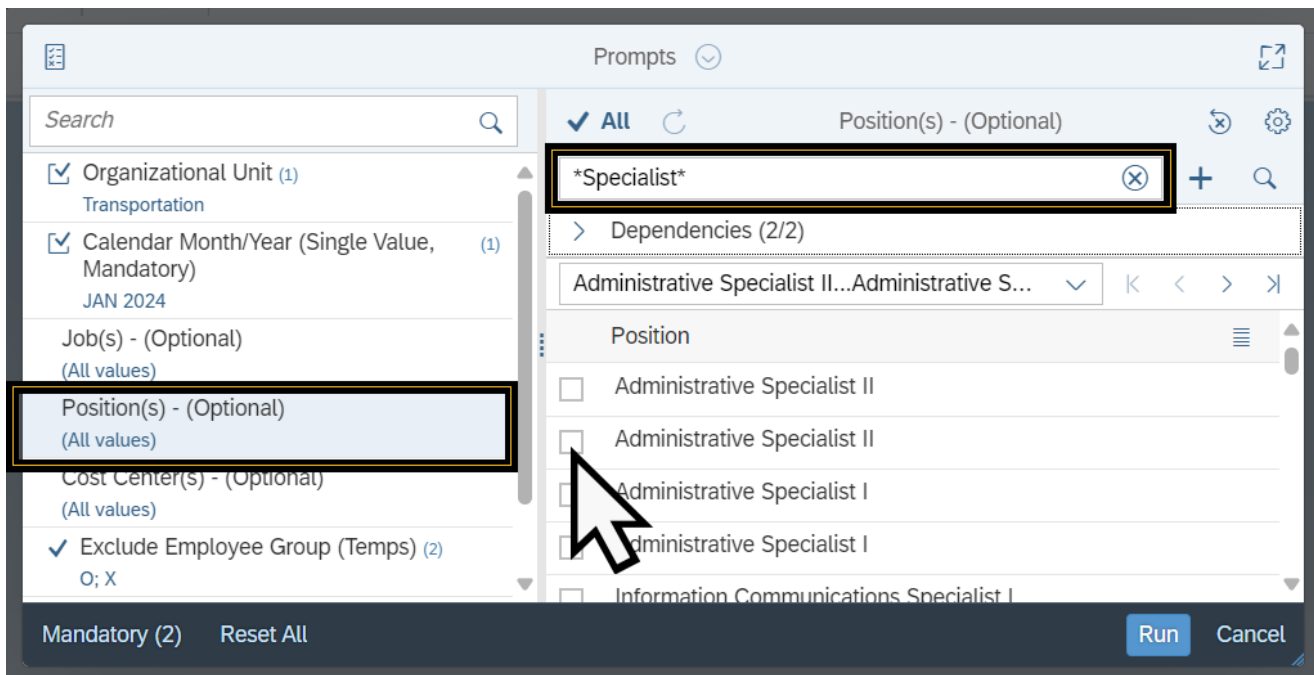
Position Number (Single Value)

The Position Number (Single Value) prompt narrows the generated report to include only the position listed in the selected values. Follow the steps below to complete the Position Number prompt.
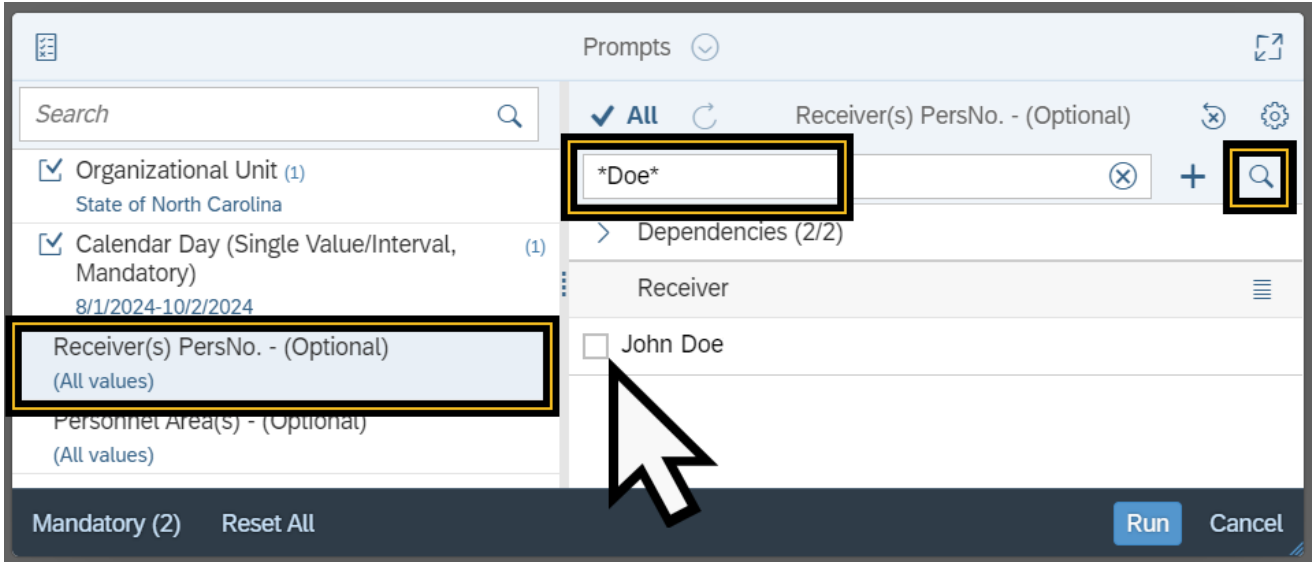
1. Select the **Position Number (Single Value)** Prompt.

2. Enter the **Position Number** the Search field.

3. Select the **Add** icon (**+**).

4. The value will be added to the Selected Value list below the Search field.
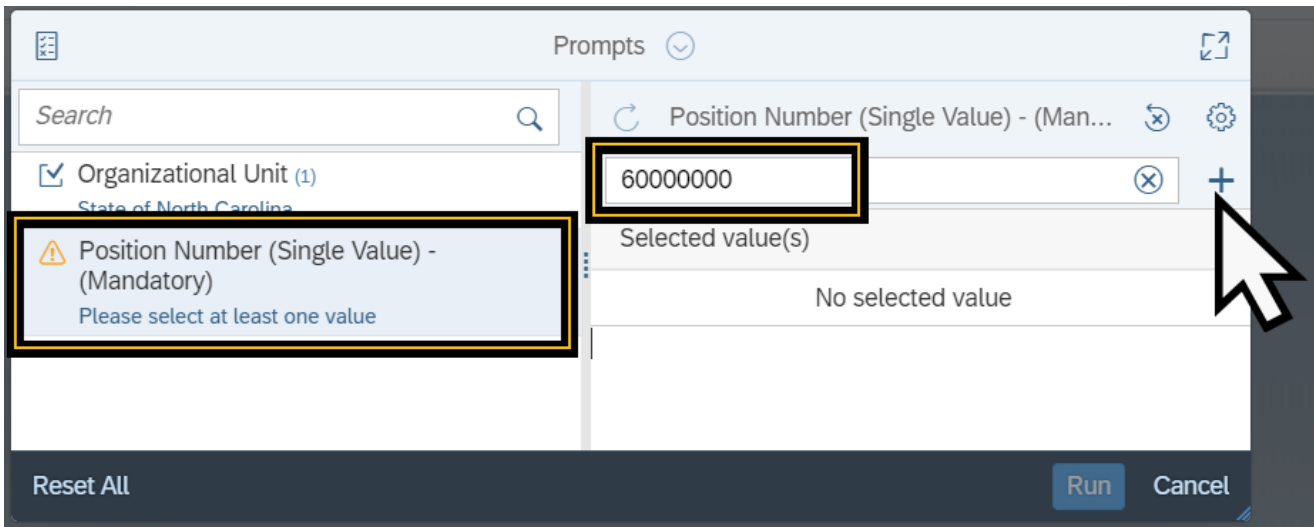
Receiver(s) PersNo.

The Receiver(s) PersNo. prompt narrows the generated report to include only data that is equal to the receivers selected in the prompt. Follow the steps below to complete the Receiver(s) PersNo. prompt.

1. Select the **Receiver(s) PersNo.** Prompt.

2. Enter the Receivers last name in title case in the Search field.

3. Click the **Search** icon (🔍).

4. Alternatively, toggle on the Search by Key in the Settings Page. Then enter the receiver's personnel number into the search field and click the **Add** icon (✚).

SSN Last 4 (Single Value)

The **SSN Last 4 (Single Value)** prompt selects a set of four numbers which correspond to the last four digits of an individuals Social Security number. This data is then used to generate the report. Follow the steps below to complete the SSN Last 4 (Single Value) prompt.

1. Select the **SSN Last 4 (Single Value)** Prompt.

2. Enter the last four digits of the individual's social security number into the **Search** field.

3. Select the **Add** icon (✛).
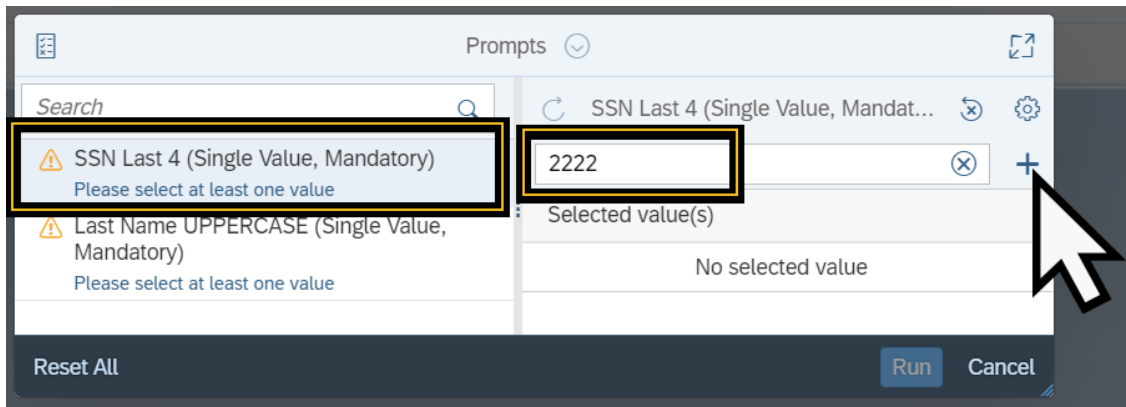
4. The value will be added to the Selected Value list below the Search field.
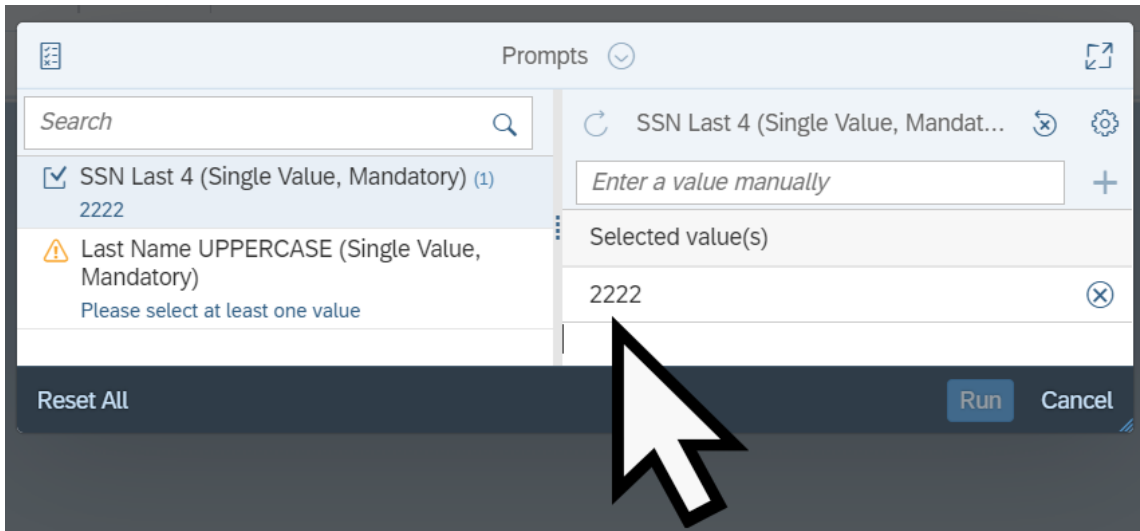
Supv Employee(s) PersNo.

The Supv Employee(s) prompt narrows the generated report to only include information that has the Supervisor listed in the selected values. Follow the steps below to complete the Supv Employee(s) PersNo. prompt.

1. Select the **Supv Employee(s) PersNo.** Prompt.

2. Enter the Supervisor Name in the Search field.

    a. Alternatively, select the settings to toggle on the Search by key and enter the Supervisor's Personnel number.

3. Select the **Add** icon (✚).

4. The value will be added to the Selected Value list below the Search field.
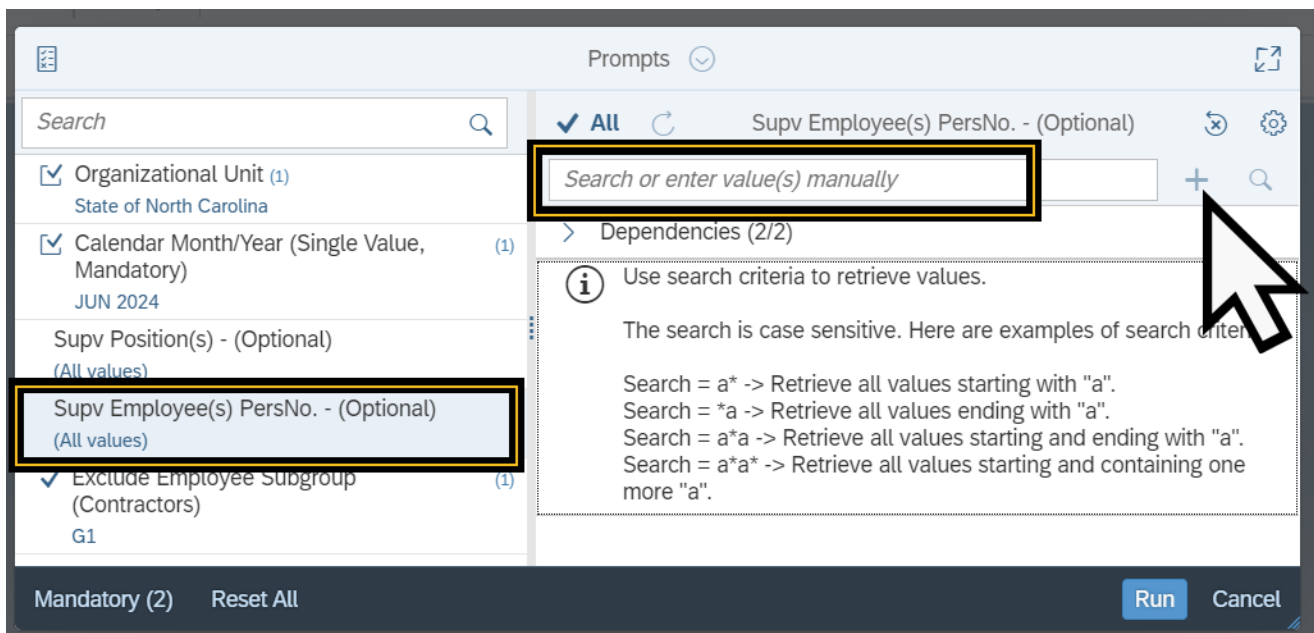
Supv Position(s)

The Supv Position(s) prompt narrows the generated report to only include information that has the Supervisor listed in the selected values. Follow the steps below to complete the Supv Position(s) prompt.

1. Select the **Supv Position(s)** prompt.

2. Use the Search field to enter the desired Supervisor Position. Wildcards (*) can be used to search for partial values.

3. Click the **Search** Icon 🔍.

4. Select checkbox next to the desired Supervisor Position.