#### LET'S SPEAK BO WEBINAR SERIES Bringing together bo users & specialists to discuss everything businessobjects





#### LET'S SPEAK BO WEBINAR SERIES BRINGING TOGETHER BO USERS & SPECIALISTS TO DISCUSS EVERYTHING BUSINESSOBJECTS

## Webi Formatting Like a Pro: All Dressed Up & Ready to Go

Roxanne Pittman, InfoSol Inc.





During a Harvard University study, neuroscientists revealed that we make 11 decisions about someone in just seven seconds of meeting them.





 First impressions matter - even for reports! This session will be covering how to use formatting shortcuts and templates to make a meaningful report stand out and shine.





#### Ugly Reports no more!

#### Report 1

ACME Computer Supply

\$20,205,093.27

\$92.920.83

7081

Internals

| Product Name | Order Year | Order Quarter | Order Month | Revenue     | Number of Or |
|--------------|------------|---------------|-------------|-------------|--------------|
| Modem 56K    | 2010       | Quarter 1     | February    | 7153.60     | 83           |
| Modem 56K    | 2010       |               | January     | 7342.59     | 92           |
| Modem 56K    | 2010       |               | March       | 6707.30     | 78           |
|              |            | Quarter 1     | Sum:        | \$21,203.49 | 253          |
|              |            |               |             |             |              |
| Product Name | Order Year | Order Quarter | Order Month | Revenue     | Number of Or |
| Modem 56K    | 2010       | Quarter 2     | April       | 9655.60     | 112          |
| Modem 56K    | 2010       |               | June        | 5954.08     | 72           |
| Modem 56K    | 2010       |               | May         | 7297.43     | 89           |
|              |            | 0             | •           | A00.007.44  | 070          |





#### Dress it up!

#### Vendor Revenue by Product Group

| AC            | ME (  | Comp          | uter | Supply           | \$20,2<br>\$   | Revenue<br>205,093.27<br>392,920.83 | <u>Orders</u><br>7,081<br>1,102 |
|---------------|-------|---------------|------|------------------|----------------|-------------------------------------|---------------------------------|
| Produ<br>Name | ct    | Order<br>Year |      | Order<br>Quarter | Order<br>Month | Revenue                             | Number<br>of Orders             |
| Mode          | m 56K |               | 2010 | Quarter 1        | February       | \$7,154                             | 83                              |
| Mode          | m 56K |               | 2010 |                  | January        | \$7,343                             | 92                              |
| Mode          | m 56K |               | 2010 |                  | March          | \$6,707                             | 78                              |
|               |       |               |      | Quarter 1        | Sum:           | \$21,203.49                         | 253                             |
|               |       |               |      |                  |                |                                     |                                 |
| Produ<br>Name | ct    | Order<br>Year |      | Order<br>Quarter | Order<br>Month | Revenue                             | Number<br>of Orders             |
| Mode          | m 56K |               | 2010 | Quarter 2        | April          | \$9,656                             | 112                             |
| Mode          | m 56K |               | 2010 |                  | June           | \$5,954                             | 72                              |
| Mode          | m 56K |               | 2010 |                  | May            | \$7,297                             | 89                              |
|               |       |               |      | Quarter 2        | Sum:           | \$22,907.11                         | 273                             |





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### **Formatting Shortcuts**

- Autofit all columns at once:
  - Select first cell SHIFT select last column cell / right click/Format cell/Auto fit width to cell

| Sales Persor | Order Year | Order Quarte | Order Month | Order Month | Customer     | Customer St     | Product Nam   | Revenue     |               |              |    |
|--------------|------------|--------------|-------------|-------------|--------------|-----------------|---------------|-------------|---------------|--------------|----|
| Chaney, Sear | 2010       | Quarter 1    | 1           | January     | Abegglen, Co | California      | Modem 56K     | \$35.75     |               |              |    |
| Chaney, Sear | 2010       | Quarter 1    | 1           | January     | Abegglen, Co | California      | Speakers      | \$274.12    |               |              |    |
| Chaney, Sear | 2010       | Quarter 1    | 1           | January     | Adamczak, Al | Wisconsin       | 21 Monitor 97 | \$15,552.81 |               |              |    |
| Chaney, Sear | 2010       | Quarter 1    |             |             | A            | 0-14            | Dt            | \$3.0E0.00  |               |              |    |
| Chaney, Sear | 2010       | Quarter 1    | FOIL        | liat Cell   |              |                 |               |             |               |              |    |
| Chaney Sear  | 2010       | Quarter 1    | G           | General     | Name         | :               |               |             |               |              |    |
|              |            |              | A           | lignment    | Size         |                 |               |             |               |              |    |
|              |            |              | F           | ont         |              | Autofit widt    | th to content | М           | inimum width: | 0.04 🗘 inche | es |
|              |            |              | В           | order       |              | Autofit heig    | ht to content | M           | linimum       | 0.16 🗘 inche | es |
|              |            |              | A           | ppearance   | Displ        | av              |               | T IC        | cigrit.       | L            |    |
|              |            |              |             |             | F            | Read content as | : Text        | •           |               |              |    |
|              |            |              |             |             |              |                 |               |             |               |              |    |





#### **Formatting Shortcuts**

 CTL + select columns to format multiple columns at same time

| Product Name       | Number<br>of<br>Orders | Number<br>of<br>Products | Number of<br>Shipments | Revenue         |
|--------------------|------------------------|--------------------------|------------------------|-----------------|
| 12-Port Hub        | 1043                   | 9548                     | 2831                   | \$852,231.52    |
| 17 Monitor XJ5     | 1240                   | 11397                    | 3184                   | \$11,933,684.45 |
| 21 Monitor 97J     | 1222                   | 11294                    | 3228                   | \$12,941,903.26 |
| 4-Port Hub         | 1185                   | 10505                    | 3266                   | \$654,894.09    |
| External CD        | 1210                   | 10787                    | 3250                   | \$2,144,877.39  |
| Flat Panel Monitor | 1279                   | 11420                    | 3261                   | \$16,480,402_14 |
| Keyboard           | 1272                   | 11763                    | 3225                   | \$239,\$06.79   |
| Microphone         | 1219                   | 11071                    | 3214                   | \$233,642.44    |
| Modom 56K          | 1102                   | 10257                    | 2000                   | ¢03 030 03      |





#### **Use the Format Painter**

| Report Elements Formatting Data Acc           | cess Analy | ysis Page Se     | etup        |             |                                       |  |  |
|---|------------|------------------|-------------|-------------|---------------------------------------|--|--|
| Font Border Cell Style                        | e Numbers  |                  | Align       | ment Size   | Padding                               | Tools  |  |
| Arial • 9 • A <sup>+</sup> A <sup>+</sup> B I | <u>U</u> S | <u>A</u> •   🆄 • |             | ┋┾╤         | - 1                                   | I 🎸 🔗  |  |
| < 🏂 🚅 🗙 🖌 =[Order Year]                       |            |                  |             |             | _                                     | Format Painte  | er (Ctrl+Shift+C)                            |
|   | C          |                  |             |             | · · · · · · · · · · · · · · · · · · · | Double-click th<br>apply the sam<br>multiple places<br>document. | his button to<br>e formatting to<br>s in the |
|   | Order Year | Order Quarte     | Order Month | Order Month | Revenue                               |  |  |
|   | 2010       | Quarter 1        | 1           | January     | \$4,                                  | 434,290.06   |  |
|   | 2010       | Quarter 1        | 2           | February    | \$3,                                  | 443,837.23   |  |
|   |            | ~ · ·            | 0           |             | <u>.</u> .                            | 100 571 00   |  |











#### **Use Pre-built cells**

 Use Pre-Defined 1 Report Elements Data R Formatting Tables Section Comment Cell Pre-Defined Blank Comment Document Name Last Refresh Date **Drill Filter** Query Summary Prompt Report Filter Summary Page number Page Number/Total Pages Total Number of Pages FOSOL 911110301 IIIC. 2021

## **Quick Display Mode**

- Preview before exporting!
- More visual reports should fit in Page mode

| Order<br>Year | Customer<br>State | Customer            | Number<br>of Orders | Revenue       |
|---------------|-------------------|---------------------|---------------------|---------------|
| 2007          | California        | Huffman, Brian      | 6                   | \$29,287.30   |
| 2007          | California        | Martinez, GITA      | 5                   | \$53,524.20   |
| 2007          | California        | Thomas, Paul        | 5                   | \$17,542.78   |
| 2007          | Pennsylvania      | Dye, Michael        | 5                   | \$8,193.00    |
| 2007          | Pennsylvania      | Milinovich, Brandon | 5                   | \$4,352.00    |
| 2007          | Pennsylvania      | Zamarripa, John     | 5                   | \$5,985.00    |
| 2007          | Virginia          | BEDROSS, Kenneth    | 4                   | \$6,235.00    |
| 2007          | Virginia          | Boardman, Jeffrey   | 5                   | \$12,357.00   |
| 2007          | Virginia          | Flake, Guy          | 5                   | \$9,104.00    |
| 2008          | Arizona           | Jesch, John         | 5                   | \$10,455.91   |
| 2008          | Arizona           | Paterson, Gabriel   | 5                   | \$18,470.58   |
| 2008          | Arizona           | Wirabudiq, Daniel   | 6                   | \$1,309.47    |
| 2008          | California        | Aquino, Mei-yen     | 5                   | \$2,580.22    |
| LessTh        | an2Orders         | 2-4 Orders          | eOrders             | A 40 A 05 A 0 |
|               |                   |                     |                     |               |





# Formatting for Excel Export

A

17

18

19

20

B

California

С

• Use 1 Ż Relative 3 4 Positioning 5 6 to 7 8 eliminate 9 10 unwanted 11 12 rows and 13 14 columns 15 16

NEOSO

| Product Nam    | Number of O | Number of Pr | Revenue     |
|----------------|-------------|--------------|-------------|
| 12-Port Hub    | 1           | 10           | \$983.26    |
| 17 Monitor XJ5 | 3           | 44           | \$46,084.19 |
| 21 Monitor 97J | 2           | 20           | \$23,240.73 |
| Flat Panel Mor | 2           | 11           | \$15,493.82 |
| Modem 56K      | 1           | 21           | \$125.14    |
| Mouse          | 1           | 7            | \$8,991.50  |
| PCMCIA Card    | 1           | 13           | \$193.67    |
| Sound Card U   | 1           | 8            | \$1,422.25  |
| Sum:           | 12          | 134          | \$96,534.58 |

D

Ε

F

#### Connecticut

| Product Nam    | Number of O  | Number of Pr | Revenue  |
|----------------|--------------|--------------|----------|
| 17 Monitor XJ5 | 1            | 4            | \$396.00 |
| External CD    | 2            | 4            | \$660.15 |
|                | ©InfoSol Inc | . 2021       |          |

#### **Export to Excel formatting**

 Adjust the column width for reports more prone to be to exported to XL to match the header column lengths to avoid additional columns of variable lengths in the spreadsheet.





#### **Conditional Formatting...**

• Based on User Input:

|     | Input Controls •                                | fx 🖆 X 🖌 |               |                |
|-----|---|----------|---------------|----------------|
|     | New 🗄 Group Map Reset 🕇 🖡                       |          |               |                |
| E=  | <ul> <li>Document Input Controls (0)</li> </ul> |          |               |                |
| = 2 | <ul> <li>Report Input Controls (1)</li> </ul>   |          |               |                |
| (?) | Highlight Revenue Below                         |          |               |                |
|     | 1000000 OK                                      |          | Product Nam   | Revenue        |
|     |   |          | 12-Port Hub   | \$377,867.81   |
|     |   |          | 17 Monitor XJ | \$5,697,673.08 |
|     |   |          | 21 Monitor 97 | \$6,241,803.42 |
| 星   |   |          | 4-Port Hub    | \$316,478.99   |
|     |   |          | External CD   | \$991,926.11   |
|     |   |          | Flat Panel Mo | \$7,653,500.43 |
|     |   |          | Keyboard      | \$116,055.12   |
|     | ₹   |          | Microphone    | \$114,194.85   |
|     |   |          | Modem 56K     | \$44,110.60    |
|     |   |          | Mouse         | \$206,882.59   |





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### **Chart format shortcuts**

- Shape up the data in a table FIRST!
  - Decimals
  - Currency
  - Sorts
  - Formulas
- Then "Turn Into" a Chart

 $F \cap S$ 

| Order Month | Revenue        | Percentag |
|-------------|----------------|-----------|
| April       | \$5,314,012.25 | 9.58%     |
| August      | \$4,299,445.44 | 7.75%     |
| December    | \$5,008,498.12 | 9.03%     |
| February    | \$3,443,837.23 | 6.21%     |
| January     | \$4,434,290.06 | 8.00%     |
| July        | \$5,889,574.78 | 10.62%    |
| June        | \$4,004,971.41 | 7.22%     |
| March       | \$4,492,574.29 | 8.10%     |
| May         | \$4,697,885.11 | 8.47%     |
| November    | \$4,336,083.70 | 7.82%     |
| October     | \$4,547,097.51 | 8.20%     |
| September   | \$4,994,406.33 | 9.00%     |

| Order | Revenue     | Percenta |
|-------|-------------|----------|
| Jan   | \$4,434,290 | 8.0%     |
| Feb   | \$3,443,837 | 6.2%     |
| Mar   | \$4,492,574 | 8.1%     |
| Apr   | \$5,314,012 | 9.6%     |
| May   | \$4,697,885 | 8.5%     |
| Jun   | \$4,004,971 | 7.2%     |
| Jul   | \$5,889,575 | 10.6%    |
| Aug   | \$4,299,445 | 7.8%     |
| Sep   | \$4,994,406 | 9.0%     |
| Oct   | \$4,547,098 | 8.2%     |
| Nov   | \$4,336,084 | 7.8%     |
| Dec   | \$5,008,498 | 9.0%     |





#### Format Large Nbrs in "M" or "K"

New custom format

Unit Scale Factor • and Formatting



#### Think: "Chop off this many zeros"

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### **Relative Positioning**

- Aligning for symmetry
- (show sections and subsections with value cells beside table & chart)





## **Changing the Style Sheets**

- Changing the default page size from A4 to Letter:
  - Creating a custom template using the CSS





#### Pre- Formatting in the Universe

- Format Years without commas
- Format numbers with commas & symbols if appropriate
- Add Year format as both String & Number for easier merging
- Standardize on # of decimals when appropriate
- Clean up ugly data with mixed case

See steps for UNX:

- Right-Click on Measure

- Select Edit Display Format

Select Number and then CUSTOM, see sample screenshot below

| Custom Format Editor                |  |       |
|-------------------------------------|--|-------|
| Define a format by typing text into | the format definition box, and by dragging tokens from the list of tokens.   |       |
| Token Categories                    | Format Definition Positive \$# Grouping # # # # 0 * Dec.sep. * 0 * 0 * Preview \$123,123,120.00                            |       |
| € Boolean                           | Negative           \$ Sign * # * Grouping * # * # * 0 * Dec.sep. * 0 * 0 *           Preview           \$-123, 123, 120,00 |       |
|                                     | Equal to Zero  |       |
|                                     | Undefined 0.00 Preview 0.00  | 0.    |
|                                     |  | Court |



#### **More Universe Formatting**

- Create short forms of commonly used items such as Month names, Short Month names, Days of week, State abbreviations, etc.
- Format Dates in multiple ways MM/dd/yyyy – YYYYMM
  - YYYY
- Add both month number and month name
- Add SORTS to LOVs





#### Format Years without comma

#### • ...in the universe

| 2,016        | 2,017        | 2,018        | 2,019      |
|--------------|--------------|--------------|------------|
| 5,974,594.09 | 6,411,977.18 | 6,667,272.42 | 921,947.25 |
| 1,249,032.37 | 1,303,820.1  | 1,670,787.98 | 231,017.14 |
| 949,357.38   | 1,065,648.24 | 1,106,371.4  | 109,287.14 |
| 235,628.02   | 225,944.76   | 265,600.7    | 14,658.3   |
| 65,868.16    | 69,506.84    | 83,695.66    | 10,735.92  |





| Customer        | Customer<br>State | Order<br>Details.Orde |                             |          |
|-----------------|-------------------|-----------------------|-----------------------------|----------|
|                 |                   | Number                | Product Name                | de<br>te |
| Aalborg, Gary   | New York          | 20,486                | Microphone                  | 0/       |
| Aalborg, Griy   | New York          | 20,487                | 21 Monitor 97J              | 4, 9/    |
| AARONS, Dale    | Florida           | 24,818                | Router                      | 6/19/    |
| AARONS, Iraj    | Florida           | 24,602                | External CD                 | 4/9/1    |
| AARONS, Iraj    | Florida           | 24,606                | Keyboard                    | 9/10/    |
| AARONS, Iraj    | Florida           | 24,608                | 4-Port Hub                  | 8/23     |
| AARONS, Michael | Florida           | 23,825                | Speakers                    | 12/1     |
| Abassi, Byron   | Wisconsin         | 45,483                | Router                      | 12/13    |
| Abassi, Charles | Washington        | 24 101                | Wireless Keyboard and Mouse | 12/3/    |

#### **Universe Formatting**

|                    |                        |                          |                        | without<br>commas       |
|--------------------|------------------------|--------------------------|------------------------|-------------------------|
| Product Name       | Number<br>of<br>Orders | Number<br>of<br>Products | Number of<br>Shipments | Revenue                 |
| 12-Port Hub        | 1043                   | 9548                     | 2831                   | \$852,231.52            |
| 17 Monitor XJ5     | 1240                   | 11397                    | 3184                   | \$11,933,684.45         |
| 21 Monitor 97J     | 1222                   | 11294                    | 3228                   | \$12,941,903.26         |
| 4-Port Hub         | 1185                   | 10505                    | 3266                   | \$654,894.09            |
| External CD        | 1210                   | 10787                    | 3250                   | \$2,144,877.39          |
| Flat Panel Monitor | 1279                   | 11420                    | 3261                   | \$16,480,402 <u>1</u> 4 |
|                    |                        |                          |                        |                         |





Numbers

#### Using Report Templates

• Open Template.pdf

| PRESBYTERIAN     Deter and Analytics     ENTER NOTES/DEFINITIONS TO APPEAR IN HEADER OF ALL     REPORT TABS IN REPORT HEADER NOTES VARIABLE |            |
|---|------------|
| _SR Template<br>HTable<br>Report Dates: -<br>Run Date: 07/10/2013<br>No Filter on HTable  |            |
| Main Header Totals Variable   |            |
| 🛛 Cover Page 🗈 Overview   🖻 Formulas - Definitions   🖻 Template Notes 🔄 HTable 📑 VTable   💼 Crosstab  | 📑 Graph    |
| O Track changes: Off H 4 E  | age 1 of 1 |
|   | 25         |

#### **Template consideration**

 Adjust the column width for reports more prone to be to exported to XL to match the header column lengths to avoid additional columns of variable lengths in the spreadsheet.





### Thank you!

#### • Questions?





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