



CPA Business Intelligence



SAP BusinessObjects™



OFFICE OF THE COMPTROLLER  
TEXAS

## Web Intelligence - Selecting, Sorting, Grouping and Summarizing Data

The following lesson contains screenshots of the actual BusinessObjects 4.1 application, with text and narration explaining how to use BusinessObjects to perform certain functions.

Please ensure that you are currently sitting at a computer that has sound playing capabilities and that the speakers are turned up to an acceptable volume.

When the narration has finished on a page, please press the [spacebar] to continue. If you would like to review a page, press the [backspace] key.

Note: If you prefer a PDF version of this tutorial please follow the link below.

[View PDF Version](#)



## Page 1 – Web Intelligence - Selecting, Sorting, Grouping and Summarizing Data

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## Set a Filter on a Section or Block in a Document

In Web Intelligence, you can apply filters to the sections and blocks in a document, which provides different results than filters set on the report as a whole.

In this tutorial, you will set a section filter on **State** and a block filter on **Store name**.



## Page 2 – Set a Filter on a Section or Block in a Document

In Web Intelligence, you can apply filters to the sections and blocks in a document, which provides different results than filters set on the report as a whole.

In this tutorial, you will set a section filter on **State** and a block filter on **Store Name**.

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### Create Breaks Between Groups of Data

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents SalesByQuarter

File Properties Report Elements Formatting Data Access

Filters Data Tracking

Filter Ranking Input Controls

Available Objects

Type here to filter tree

- SalesByQuarter
  - Quarter
  - State
  - Store name
  - Year
  - Sales revenue
  - Variables

In this example, we'll set a section filter on **State** and a block filter on **Store name**.

Click the **Filter** list.

#### Sales Revenue by Quarter

##### California

Store name	Year	Quarter	Sales revenue
e-Fashion Los Angeles	2004	Q1	\$308,928
e-Fashion Los Angeles	2004	Q2	\$252,558
e-Fashion Los Angeles	2004	Q3	\$232,327
e-Fashion Los Angeles	2004	Q4	\$188,824
e-Fashion Los Angeles	2005	Q1	\$398,860
e-Fashion Los Angeles	2005	Q2	\$303,980

## Page 3 – Set a Section and a Block Filter

In this example, we'll set a section filter on **State** and a block filter on **Store name**.

Click the **Filter** list.

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### Create Breaks Between Groups of Data

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home | Documents | SalesByQuarter

File | Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup | Reading | Design

Filters | Data Tracking | Display | Conditional | Interact | Functions

Filter | Ranking | Input Controls | Group | Break | Sort | Drill | Filter Bar | Outline

Available Objects

Type here to filter tree

- SalesByQuarter
  - Quarters
  - State
  - Store name
  - Year
  - Sales revenue
  - Variables

**Add Filter**

Edit Filter

Remove Filter

Filter by a New Input Control

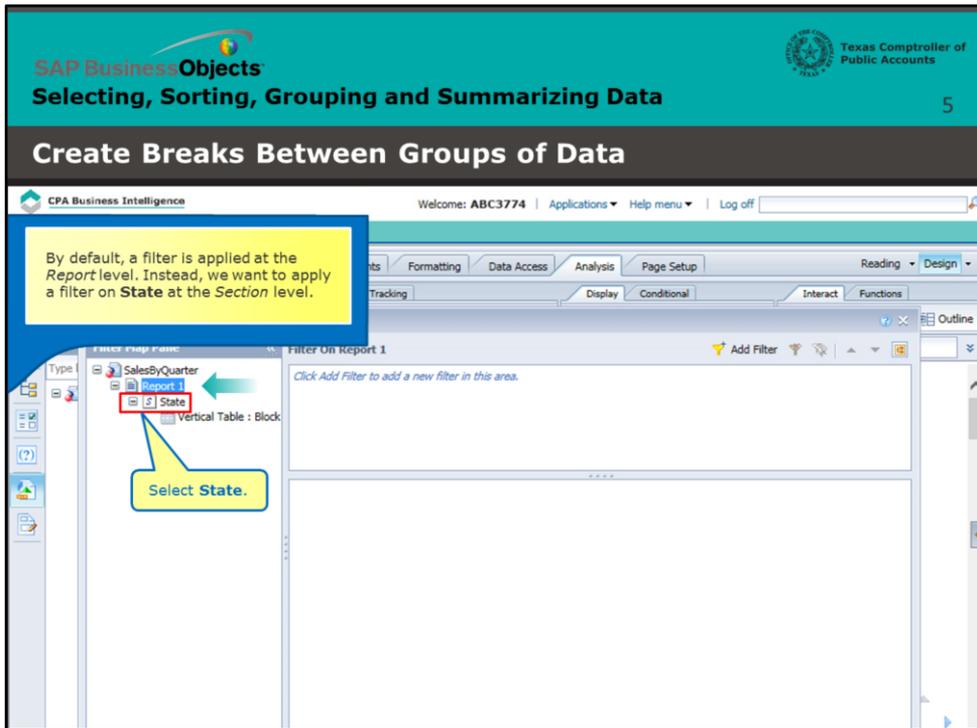
**Sales Revenue by Quarter**

California

Store name	Year	Quarter	Sales revenue
e-Fashion Los Angeles	2004	Q1	\$308,928
e-Fashion Los Angeles	2004	Q2	\$252,558
e-Fashion Los Angeles	2004	Q3	\$232,327
e-Fashion Los Angeles	2004	Q4	\$188,824
e-Fashion Los Angeles	2005	Q1	\$398,860
e-Fashion Los Angeles	2005	Q2	\$303,980

## Page 4 – Set a Section and a Block Filter (continued)

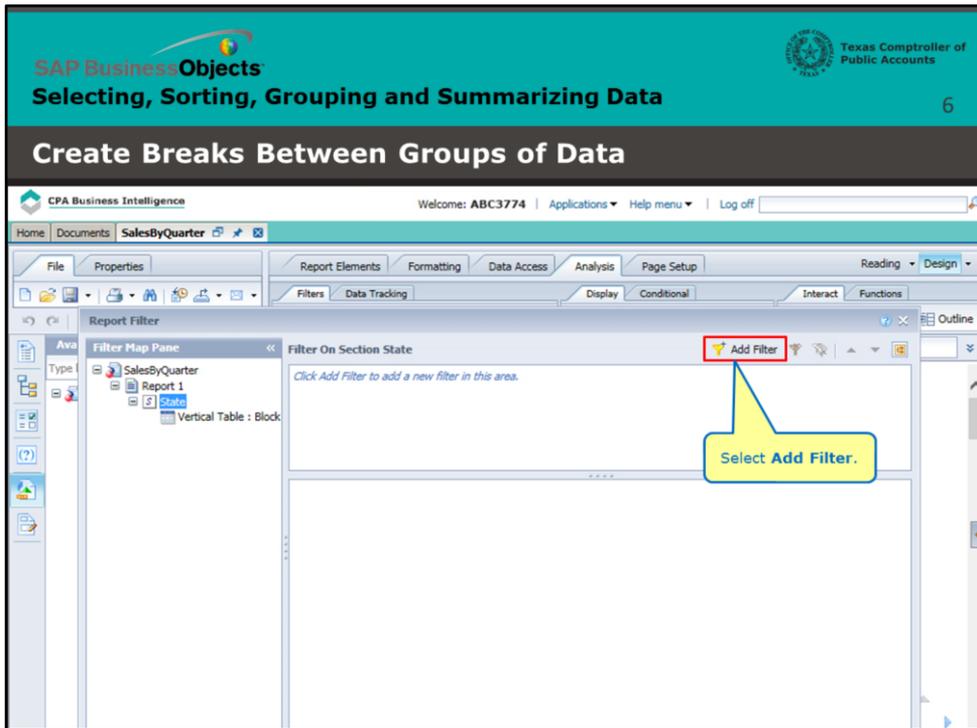
Select **Add Filter**.



## Page 5 – Apply Filter at the Section Level

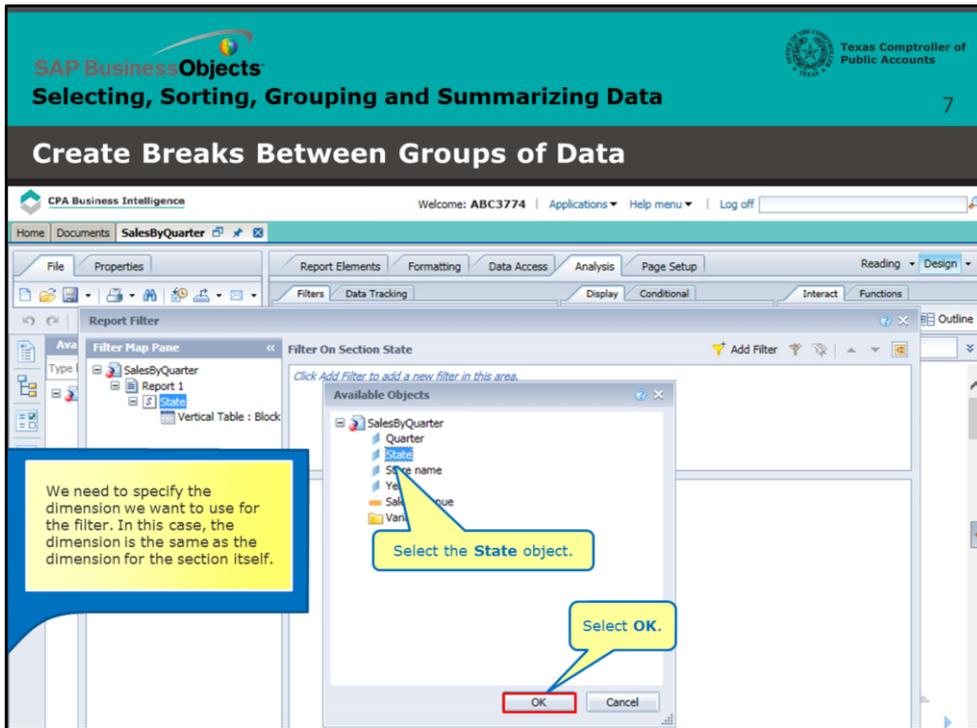
By default, a filter is applied at the **Report** level. Instead, we want to apply a filter on State at the **Section** level.

Select **State**.



## Page 6 – Apply Filter at the Section Level (continued)

Select **Add Filter**.

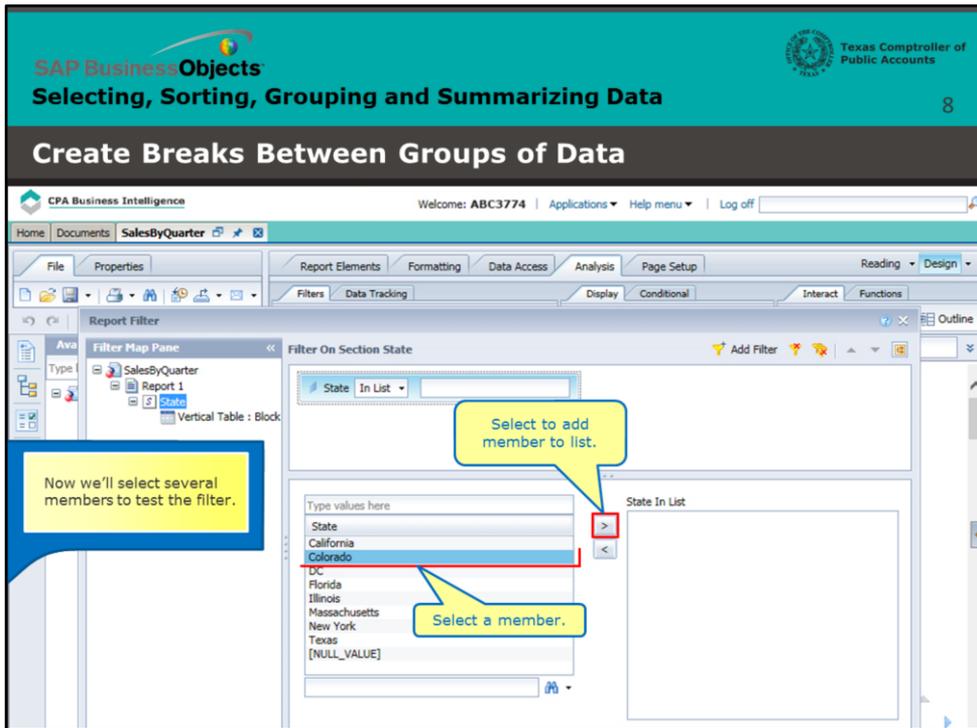


## Page 7 – Specify the Dimension

We need to specify the dimension we want to use for the filter. In this case, the dimension is the same as the dimension for the section itself.

Select the **State** object.

Select **OK**.

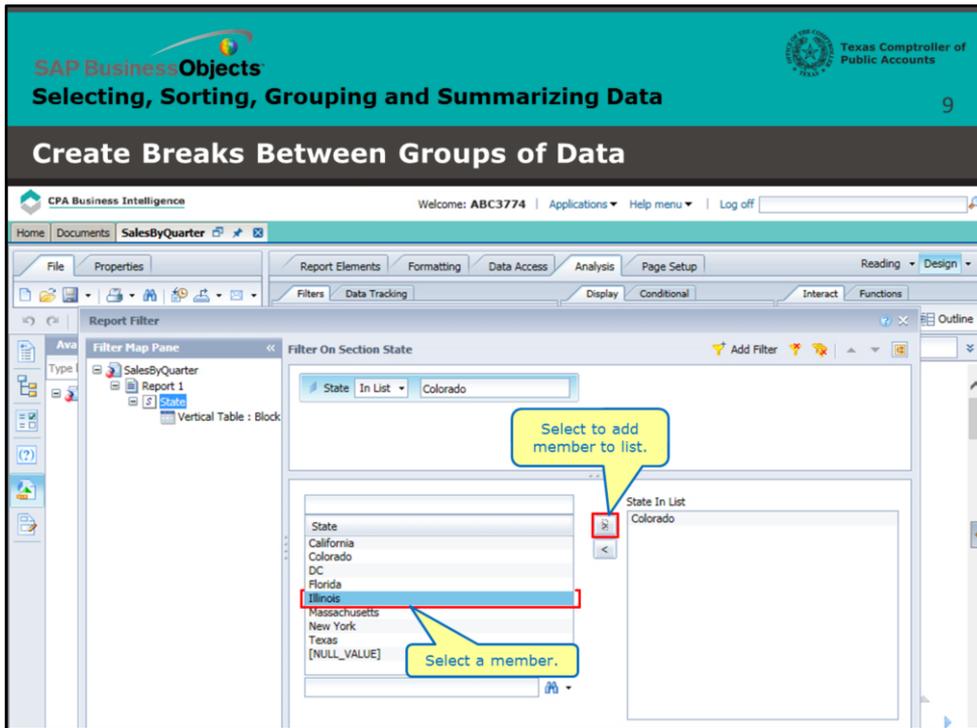


## Page 8 – Test the Filter

Now we'll select several members to test the filter.

Select a member.

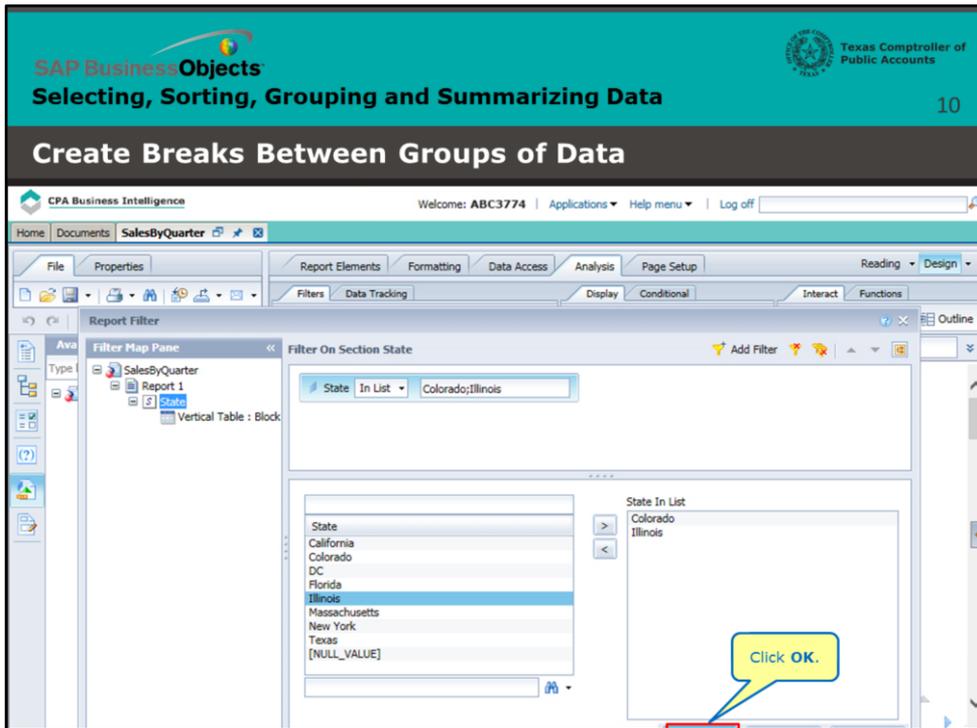
Select to add member to list.



## Page 9 – Test the Filter (continued)

Select a member.

Select to add member to list.



## Page 10 – Test the Filter (continued)

Click **OK**.

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**Create Breaks Between Groups of Data**

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Home | Documents | SalesByQuarter

File | Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup | Reading | Design

Filters | Data Tracking | Display | Conditional | Interact | Functions

Filter | Ranking | Input Controls | Group | Break | Sort | Drill | Filter Bar | Outline

Available Objects

Type here to filter tree

- SalesByQuarter
  - Quarter
  - State
  - Store name
  - Year
  - Sales revenue
  - Variables

**Sales Revenue by Quarter**

Colorado

Store name	Year	Quarter	Sales revenue
e-Fashion Colorado Springs	2004	Q1	\$131,797
e-Fashion Colorado Springs	2004	Q2	\$129,076
e-Fashion Colorado Springs	2004	Q3	\$85,621
e-Fashion Colorado Springs	2004	Q4	\$101,807
e-Fashion Colorado Springs	2005	Q1	\$189,131
e-Fashion Colorado Springs	2005	Q2	\$157,337

Select to scroll down.

**Page 11 – Test the Filter (continued)**

Select to scroll down.

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**Create Breaks Between Groups of Data**

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home | Documents | **Counts by Location**

Elements | Formatting | Data Access | Analysis | Page Setup | Reading | Design

Data Tracking | Display | Conditional | Interact | Functions

Ranking | Input Controls | Group | Break | Sort | Drill | Filter Bar | Outline

Filter: =NameOf([Store name])

Note that only the sections for Colorado and Illinois appear. The other sections are suppressed.  
 Now let's remove the section filter.

State	Store name	Year	Quarter	Sales revenue
Colorado	e-Fashion Colorado Springs	2006	Q2	\$213,663
Colorado	e-Fashion Colorado Springs	2006	Q3	\$232,889
Colorado	e-Fashion Colorado Springs	2006	Q4	\$192,279
<b>Illinois</b>				
Illinois	e-Fashion Chicago 33rd	2004	Q1	\$256,454
Illinois	e-Fashion Chicago 33rd	2004	Q2	\$241,149
Illinois	e-Fashion Chicago 33rd	2004	Q3	\$107,006
Illinois	e-Fashion Chicago 33rd	2004	Q4	\$133,306
Illinois	e-Fashion Chicago 33rd	2005	Q1	\$334,297
Illinois	e-Fashion Chicago 33rd	2005	Q2	\$254,722

Select to scroll up.

## Page 12 – See the Filtered Results

Note that only the sections for Colorado and Illinois appear. The other sections are suppressed.

Now let's remove the section filter.

Select to scroll up.

## Create Breaks Between Groups of Data

The screenshot shows the SAP Business Objects interface. The report is titled "Sales Revenue by Quarter" and is filtered for "Colorado". A red horizontal line is drawn across the section header. A yellow callout bubble with a red border points to this line, containing the text "Click the border for the section". Below the header is a table with the following data:

Store name	Year	Quarter	Sales revenue
e-Fashion Colorado Springs	2004	Q1	\$131,797
e-Fashion Colorado Springs	2004	Q2	\$129,076
e-Fashion Colorado Springs	2004	Q3	\$85,621
e-Fashion Colorado Springs	2004	Q4	\$101,807
e-Fashion Colorado Springs	2005	Q1	\$189,131
e-Fashion Colorado Springs	2005	Q2	\$157,337

## Page 13 – Remove the Section Filter

Click the border for the section.

Create Breaks Between Groups of Data

The screenshot shows the SAP Business Objects interface. The report is titled "Sales Revenue by Quarter" and is filtered for "Colorado". The data is presented in a table with columns for Store name, Year, Quarter, and Sales revenue. A yellow callout box points to the "Filter" button in the toolbar, with the text "Select the Filter list.".

Store name	Year	Quarter	Sales revenue
e-Fashion Colorado Springs	2004	Q1	\$131,797
e-Fashion Colorado Springs	2004	Q2	\$129,076
e-Fashion Colorado Springs	2004	Q3	\$85,621
e-Fashion Colorado Springs	2004	Q4	\$101,807
e-Fashion Colorado Springs	2005	Q1	\$189,131
e-Fashion Colorado Springs	2005	Q2	\$157,337

Page 14 – Remove the Section Filter (continued)

Select the **Filter** list.

## Create Breaks Between Groups of Data

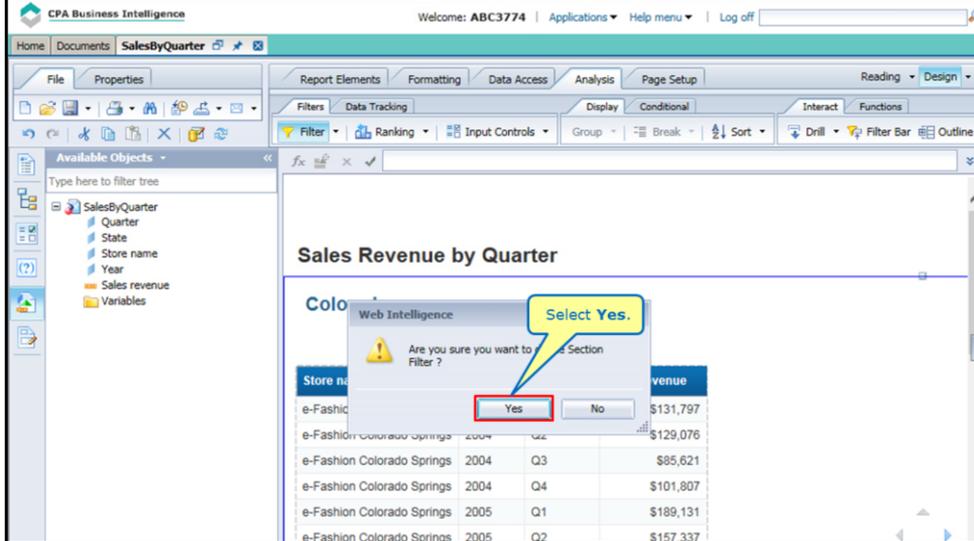
The screenshot shows the SAP Business Objects interface. The 'Filter' menu is open, and the 'Remove Filter' option is highlighted with a red box. A yellow callout box points to this option with the text 'Select Remove Filter.'. The main window displays a table titled 'Sales Revenue by Quarter' for Colorado.

Store name	Year	Quarter	Sales revenue
e-Fashion Colorado Springs	2004	Q1	\$131,797
e-Fashion Colorado Springs	2004	Q2	\$129,076
e-Fashion Colorado Springs	2004	Q3	\$85,621
e-Fashion Colorado Springs	2004	Q4	\$101,807
e-Fashion Colorado Springs	2005	Q1	\$189,131
e-Fashion Colorado Springs	2005	Q2	\$157,337

## Page 15 – Remove the Section Filter (continued)

Select **Remove Filter**.

Create Breaks Between Groups of Data



Page 16 – Remove the Section Filter (continued)

Select **Yes**.

Create Breaks Between Groups of Data

The screenshot shows the SAP Business Objects interface. The main report area displays a table of sales revenue data for California, filtered by state. The table has columns for Store name, Year, Quarter, and Sales revenue. A yellow callout box with a blue arrow points to the 'Filter' button in the toolbar, with the text 'Select the Filter list.' inside the box.

Store name	Year	Quarter	Sales revenue
e-Fashion Los Angeles	2004	Q1	\$308,928
e-Fashion Los Angeles	2004	Q2	\$252,558
e-Fashion Los Angeles	2004	Q3	\$232,327
e-Fashion Los Angeles	2004	Q4	\$188,824
e-Fashion Los Angeles	2005	Q1	\$398,860
e-Fashion Los Angeles	2005	Q2	\$303,980

Page 17 – Add a Section Filter

Select the **Filter** list.

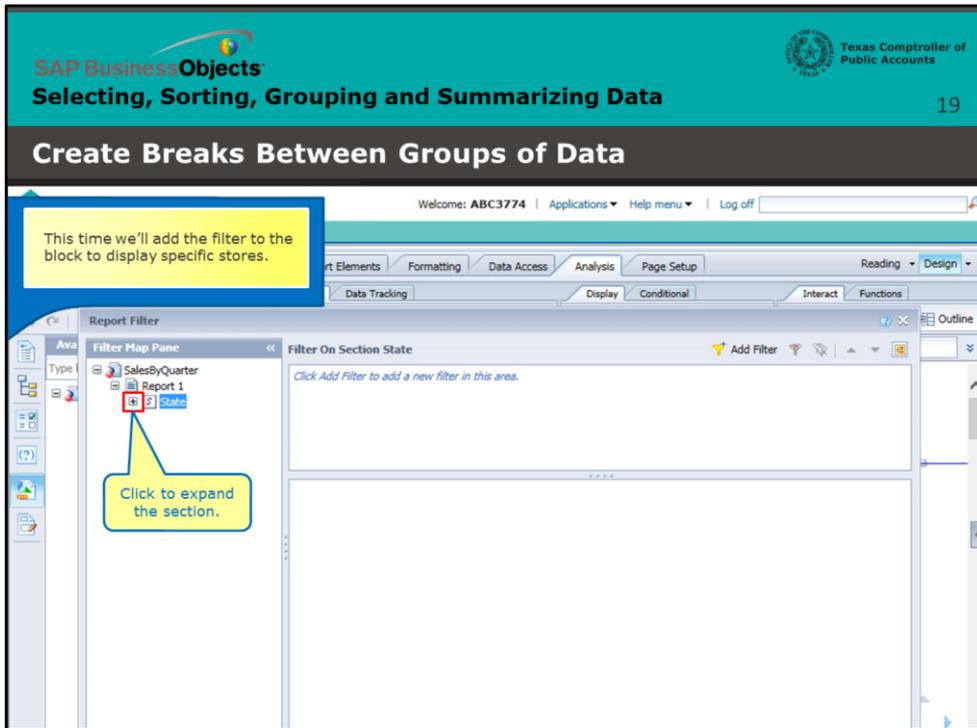
Create Breaks Between Groups of Data

The screenshot shows the SAP Business Objects interface. The main report area displays a table titled "Sales Revenue by Quarter" for California. The table has columns for Store name, Year, Quarter, and Sales revenue. The data is grouped by state (California) and then by store name. A red box highlights the "Add Filter" button in the "Filters" menu, and a callout bubble points to it with the text "Select Add Filter."

Store name	Year	Quarter	Sales revenue
e-Fashion Los Angeles	2004	Q1	\$308,928
e-Fashion Los Angeles	2004	Q2	\$252,558
e-Fashion Los Angeles	2004	Q3	\$232,327
e-Fashion Los Angeles	2004	Q4	\$188,824
e-Fashion Los Angeles	2005	Q1	\$398,860
e-Fashion Los Angeles	2005	Q2	\$303,980

Page 18 – Add a Section Filter (continued)

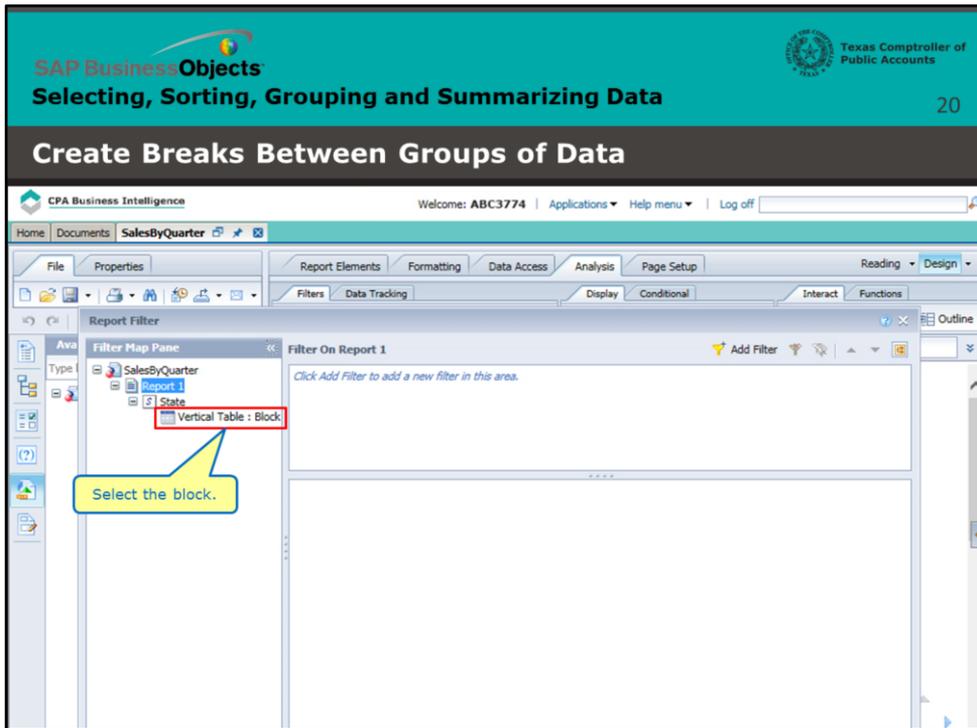
Select **Add Filter**.



## Page 19 – Add a Section Filter (continued)

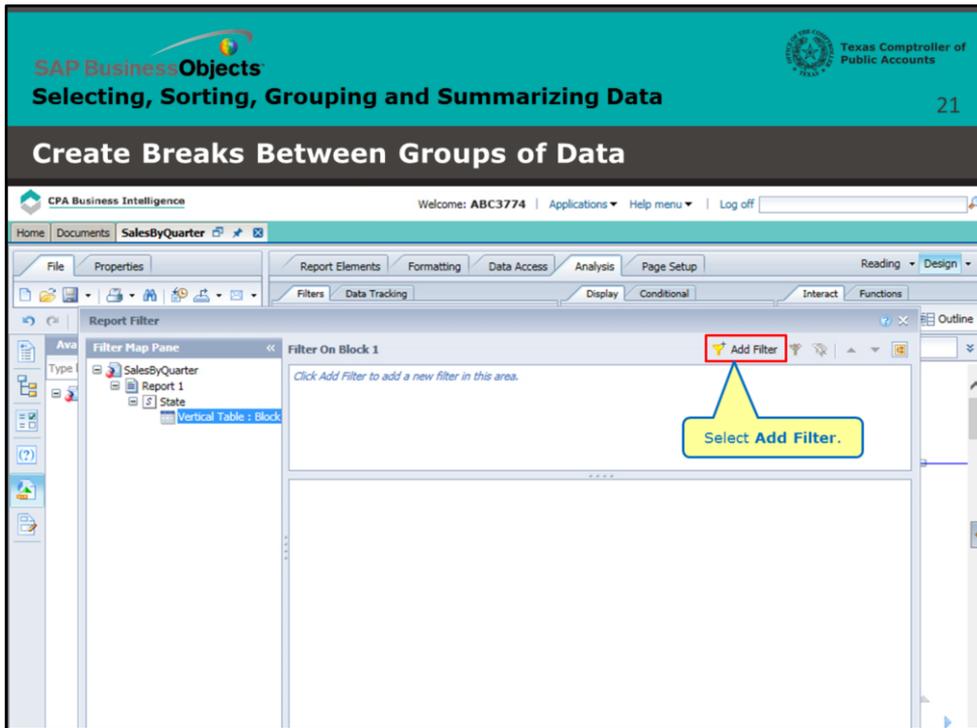
This time we'll add the filter to the block to display specific stores.

Click to expand the section.



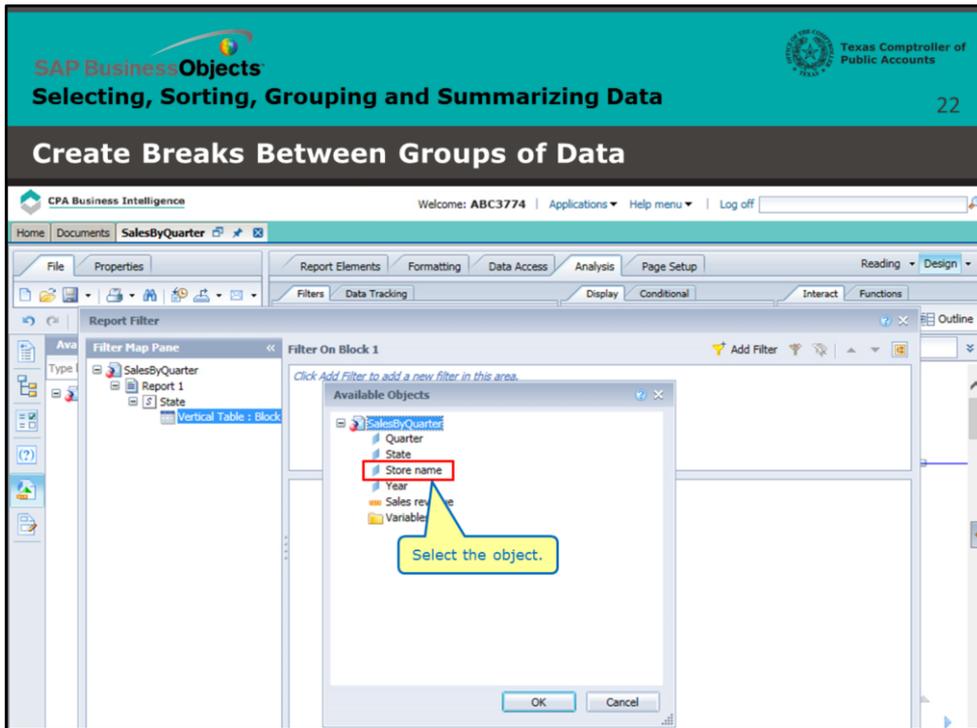
## Page 20 – Add a Section Filter (continued)

Select the block.



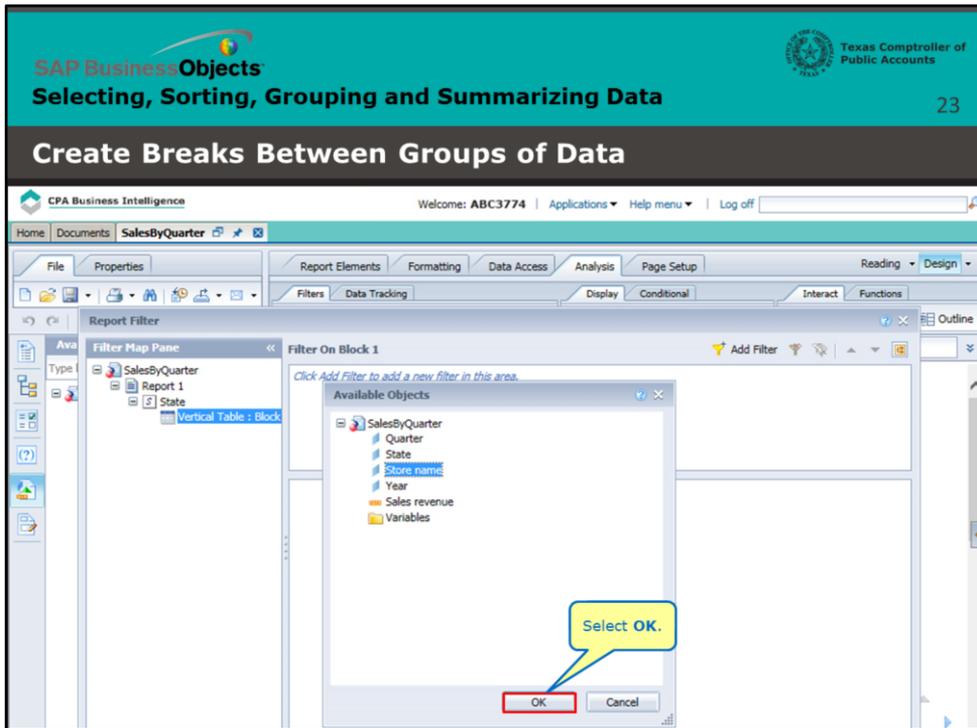
## Page 21 – Add a Section Filter (continued)

Select **Add Filter**.



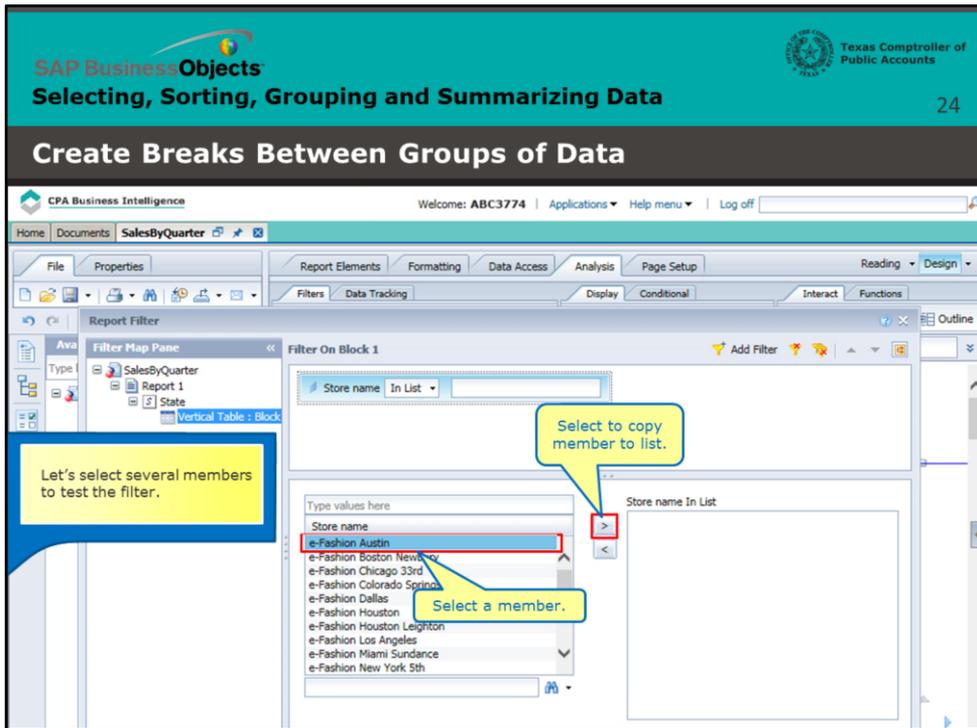
## Page 22 – Add a Section Filter (continued)

Select the object.



## Page 23 – Add a Section Filter (continued)

Select **OK**.

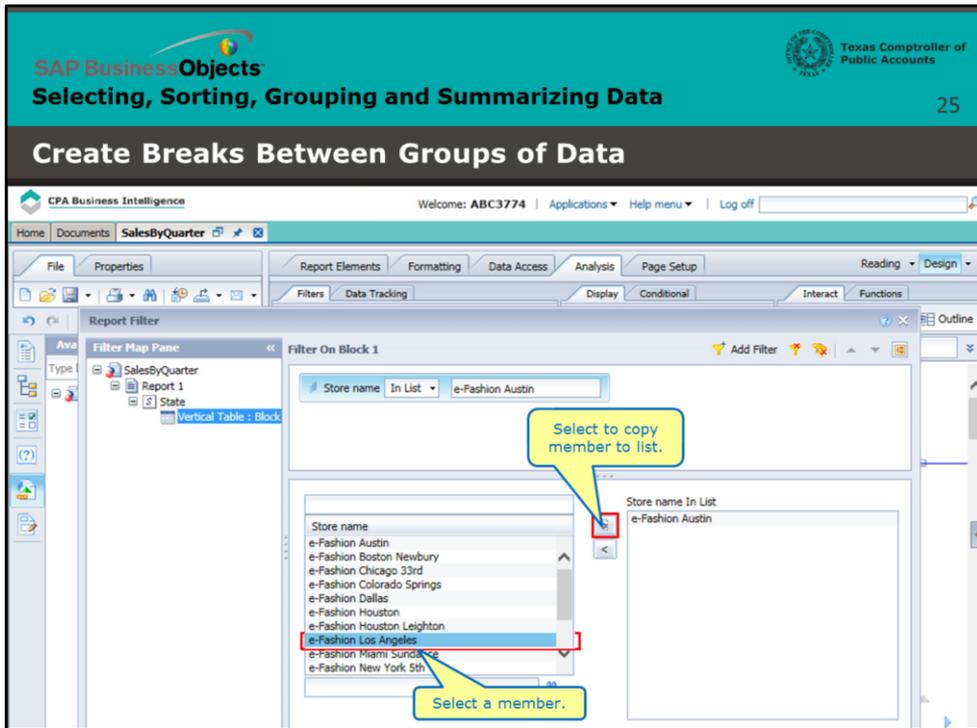


## Page 24 – Test the Filter

Let's select several members to test the filter.

Select a member.

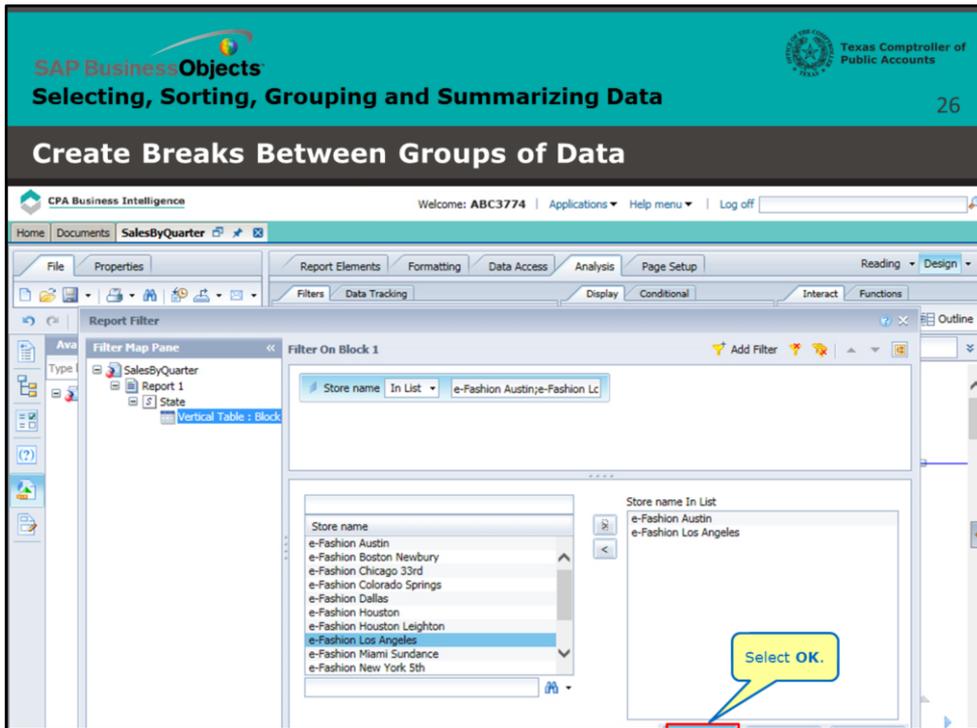
Select to copy member to list.



## Page 25 – Test the Filter

Select a member.

Select to copy member to list.



## Page 26 – Test the Filter (continued)

Select **OK**.

**SAP Business Objects**  
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**Create Breaks Between Groups of Data**

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Filters | Data Tracking | Display | Conditional | Interact | Functions

Filter | Ranking | Input Controls | Group | Break | Sort | Drill | Filter Bar | Outline

Available Objects

Type here to filter tree

- SalesByQuarter
  - Quarter
  - State
  - Store name
  - Year
  - Sales revenue
  - Variables

**Sales Revenue by Quarter**

California

Store name	Year	Quarter	Sales revenue
e-Fashion Los Angeles	2004	Q1	\$308,928
e-Fashion Los Angeles	2004	Q2	\$252,558
e-Fashion Los Angeles	2004	Q3	\$232,327
e-Fashion Los Angeles	2004	Q4	\$188,824
e-Fashion Los Angeles	2005	Q1	\$398,860
e-Fashion Los Angeles	2005	Q2	\$303,980

Select to scroll down.

## Page 27 – Test the Filter (continued)

Select to scroll down.

Create Breaks Between Groups of Data

Note that blocks are displayed for all sections, but the contents are displayed only for the selected stores.

The screenshot shows the SAP Business Objects interface. On the left, the 'Available Objects' pane is visible with a tree structure including 'SalesByQuarter', 'Quarter', 'State', 'Store name', 'Year', 'Sales revenue', and 'Variables'. The main workspace displays a data table with a filter expression '=NameOf([Store name])'. The table is grouped by state, with 'New York' and 'Texas' sections. Each section has a 'Discontinued' row above its data table. The data table for Texas shows the following rows:

Store name	Year	Quarter	Sales revenue
e-Fashion Austin	2004	Q1	\$197,891
e-Fashion Austin	2004	Q2	\$154,039
e-Fashion Austin	2004	Q3	\$81,037

Page 28 – Test the Filter (continued)

Note that blocks are displayed for all sections, but the contents are displayed only for the selected stores.

**Set a Filter on a Section or a Block  
in a Document**

This concludes this lesson.

[Additional Tutorials](#)

## Page 29 - Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

[Additional Tutorials](#)