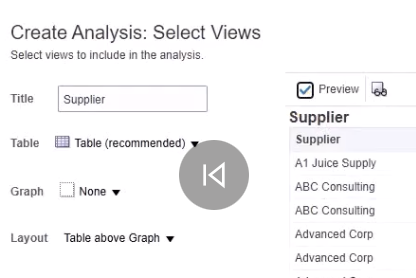
Review the OTBI User Interface

* Go to Tools > Reports and Analytics
* Click Browse Catalog
* Most of the objects will be in custom folder in shared
* Delivered objects will be in Financials folder in shared
* My Folders is where you will find your own objects that are private
* A screenshot of a phone

  Description automatically generated This is what different icons represent

Use BI Composer

* Go to Tools > Reports and Analytics
* Click on Create > Analysis
* Search Payables Invoices
* Check Transactions Real Time and Continue
* Expand Payables Invoices under Subject Area
* Select the Supplier, Supplier Number inside the Supplier Folder
* Select the Site inside the Supplier Site Folder
* Go to Supplier Site Address > Supplier Site Location Details >
* Select the following: Site Address Address Line 1, Site Address City, Site Address County, Site Address State Click NEXT

 Click NEXT

* Move Supplier Number to the top and Click Next
* Add sort for Site Address City and Supplier
* Click NEXT 2x
* Analysis Name: 99Supplier Listing
* Click on MyFolders and create a new folder: 99Payables
* Now select that folder and Click SUBMIT
* To view, go in Tools > Reports and Analytics > MyFolders > 99Payables > Click on 99Supplier Listing
* Another way to view is by going in Tools > Reports and Analytics > BI Catalog > MyFolders > 99Payables > Click on 99Supplier Listing > More > Export in Excel

Create an Analysis, a View and a View Selector

* Go to Tools > Reports and Analytics > BI Catalog
* Click the new icon that looks like bars on top left > Select Analysis
* Search Payables Invoices > Click Transactions Real Time and Continue
* Drag in the following:
* Supplier > Click Supplier
* Business Unit > Click Business Unit Name
* Invoice Details > General Info > Click Invoice Number and Invoice Date
* Invoice Details > Reference Info > Payment Status Name
* Invoice Details > Invoice Amounts > Click Invoice Amount and Invoice Currency
* Drag Payment Status Name all the way to the right
* Click on the icon next to Payment Status Name
* Filter > In values, check fully paid and not paid
* Click on the icon next to Supplier
* Filter > In values, check advanced corp
* Click on the icon next to Business Unit Name
* Filter > In values, check Supremo US Business
* Save As > My Folder > 99Payables > Name: 99Paid and Unpaid Invoices
* Click on the icon next to Payment Status Name
* Column Properties > Conditional Format > Add Condition > Payment Status Name > Check Not Paid
* In Edit format, select Red Color
* Now underneath the 1st row, click ADD CONDITION > Payment Status Name
* Check fully paid
* Select Blue in Font Section
* The box where is shows 2 rows, Click OK
* Click Save
* In the top bar, Click Results
* To the right of the NEW button, click on New Balance Measure button
* Invoice Detail > Invoice Amount > Invoice Amount
* Add the invoice amount, then click the minus sign, then click Invoice Amount Paid
* click the minus sign, then click Discount Taken
* Click OK and SAVE
* In the top bar, Click Results
* Drag the Supplier Column by its handle and drop it in a little above of where its at
* Drag the Business Unit Column by its handle and drop it in next to Supplier
* In the Title section, click on the pen icon
* Check logo and upload the image > click done
* Go into the Criteria section in the top bar > Click on Add or Remove subject Area icon on the top
* Check Payables Invoices – Installments Real Time
* In the Subject Area Section, close the Transactions Real Time and expand the Installments Real Time
* Invoices Installment Amounts > Click Unpaid Amount
* Invoice Details > General Information > Click Payment Terms Name
* Invoice Details > Reference Information > Click Payment Method
* In the top bar, Click Results and SAVE
* Click on the new icon > Graph > Pie
* Scroll down to find the graph
* Click on the pen icon in the graphs section
* In the Layout Section, under the pie chart, Drag the Payment Terms Name into Slices
* Drag Invoice Number, Invoice Date, Invoice Currency, Discount Taken, Unpaid Amount into the excluded
* Click Done
* Click on the new icon > Other Views > View Selector
* Scroll down to find the View Selector and click on the pen icon
* Add table and graph
* Click done
* Click on the respective Xs to remove the table and the graph
* A screenshot of a computer

  Description automatically generated Click on this
* Go to the Interactions tab > Uncheck Include/Exclude Columns
* SAVE
* In the top right bar, click Catalog
* In MyFolders > 99Payables > Open 99Paid and Unpaid Invoices
* On the bottom, click edit
* Go to the Criteria page on top left and remove Advanced Corp in the filters below
* SAVE
* To view the Analysis:
* In the top right bar, click Catalog
* In MyFolders > 99Payables > Open 99Paid and Unpaid Invoices

**Schedule an Analysis**

* Tools > Reports and Analytics > Browse Catalog
* A screenshot of a computer screen

  Description automatically generated Click More > Schedule
* Go in the Schedule Section
* Set the frequency to ONCE
* Go in the Conditions Section
* Select Do Not Use A Condition
* Go in the Delivery Content Section
* Subject: 99Paid and Unpaid Invoices
* For Content: Click Browse and Select 99Paid and Unpaid Invoices
* Update the format to PDF
* Select Deliver as Attachment
* Attachment Note: See Attachment
* Go in the Recipients Section
* Click on the Email icon next to the + icon
* Type in any email address
* Go in the Destinations Section
* Click Specify Devices > Choose Email
* Go in the Actions Section
* A screenshot of a computer

  Description automatically generated Click Save Agent
* Go in 99Payables > Type the name: 99Schedule
* A computer screen with a mouse pointer and a black square

  Description automatically generated Click Run Agent Now

**Create a Dashboard and a Prompt**

* Tools > Reports and Analytics > Browse Catalog
* Click on the New icon > Click Dashboard
* Name: 99My Payables Dashboard
* Save it in 99Payables
* Click Save
* Drag and Drop 99Supplier Listing from the catalog on the left to the right
* A screenshot of a computer

  Description automatically generated Add a new Dashboard Page
* Name: Paid and Unpaid Invoices
* Drag and Drop 99Paid and Unpaid Invoices from the catalog on the left to the right
* Click Save
* Click on Catalog in the top bar
* MyFolders > 99Payables > Click 99My Payables Dashboard > On Page 1, click More > Rename : Supplier Listing
* Click on Catalog in the top bar
* Go in 99Payables Folder < New Icon < Create a new folder < Name: 99Prompts
* Go into that folder < click New icon < Dashboard Prompt < Select Payables Invoices – Transactions Real Time
* A computer screen shot of a computer

  Description automatically generated Create a column prompt
* Select Supplier inside the Supplier folder < OK
* Save < MyFolder < 99Prompts < Name: 99Payables Dashboard Prompt
* Click on Catalog in the top bar
* MyFolder < 99Payables < 99Supplier Listing Edit
* Click on Criteria in the top left
* Click on the icon next to Supplier < Filter
* In the operator dropdown, select “is prompted”
* Click SAVE
* Click on Catalog in the top bar
* On 99Paid and Unpaid Invoices, click EDIT
* Click on Criteria in the top left
* Click on the icon next to Supplier > Filter
* In the operator dropdown, select “is prompted”
* Click SAVE
* Click on Catalog in the top bar
* On 99My Payables Dashboard, click EDIT
* On the bottom left, find the catalog section
* Clck MyFolder > 99Payables > 99Prompts > Select 99Payables Dashboard Prompt > Drag and drop it in the top column
* In the 99Payables Dashboard Prompt box, click on property > Scope > Dashboard
* Click SAVE
* Click on Catalog in the top bar
* Open 99My Payables Dashboard
* Select the value as ABC Consulting > Apply
* On the top left, click the second section: Paid and Unpaid Invoices
* Now in the settings icon on top right, Click Edit Dashboard
* Here in the setting on top right, Click Dashboard Properties
* Change the style to FusionFX > OK
* Click Save
* Click RUN on top right

**Create a Sandbox**

* In the home page, go to the configurations section > Sandbox
* Click Create Sandbox
* Name: 99Class\_Infolets
* Check Page Composer
* Click Create and Enter
* To exit the Sandbox, click on the name of the sandbox on top left > click exit

Create a User-defined Infolet

* In the home page, go to the configurations section > Sandbox
* Enter the 99Class\_Infolets
* On the gold bar, click tools > Page Composer
* In the home page, scroll down to Analytics
* Click on the User defined infolets tab
* Click on the small repository icon on the right
* Scroll all the way down and select Create Infolet
* Infolet Title: 99Unposted Journals
* Expanded View: Yes. 2 x 2
* Save and close
* Now in the User defined infolets tab, find the 99Unposted Journals > Add Content > Report and Analytics > BIPresentationServer > Shared Folders > Custom > Class Infolets > Click on Add Total Unposted Journals > Save and close
* Now expand the 99Unposted Journals Infolets > Add Content > Click on Add Unposted Journals by Ledger > Save and close
* Close the composer by clicking Close on top right
* Click on 99Class\_Infolets on top left > Click Publish
* Click Publish again on top right