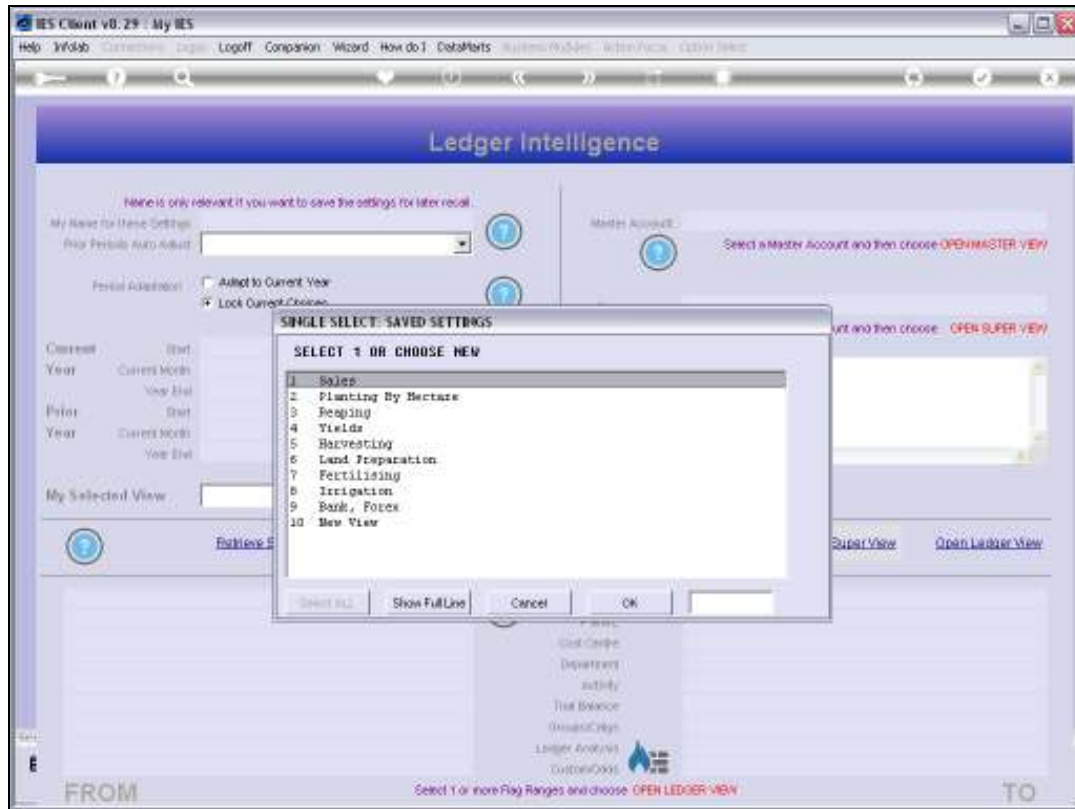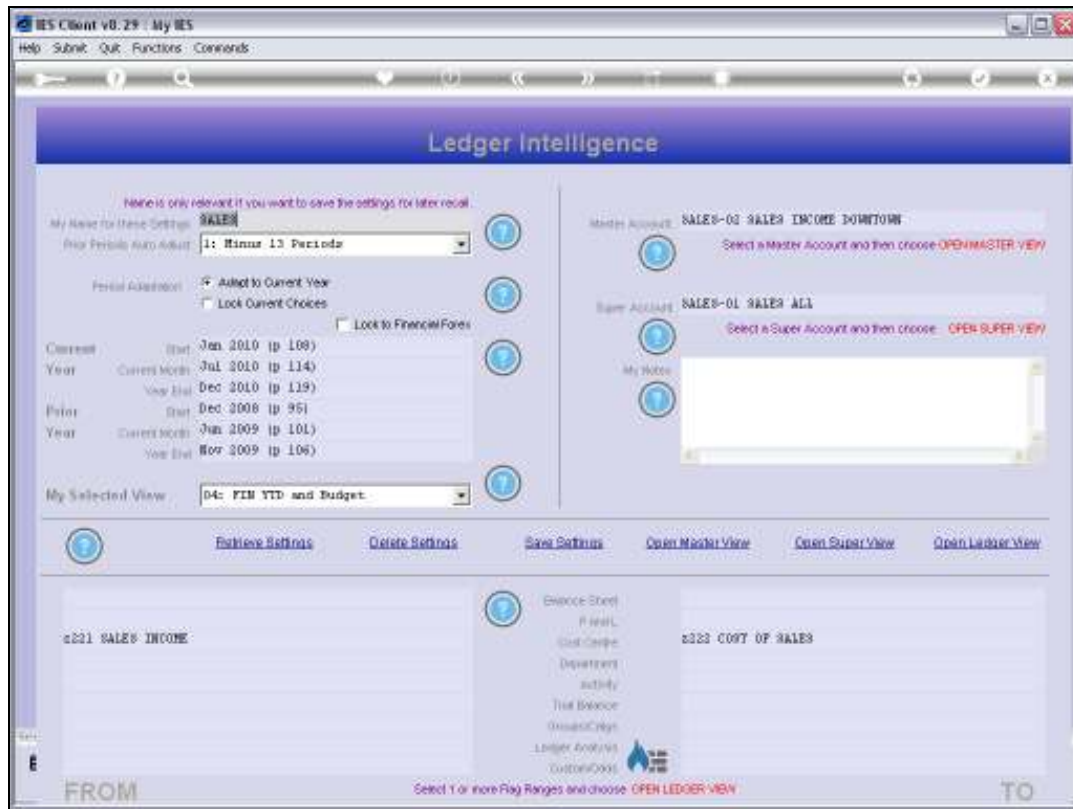Slide 1

Slide notes: When we use Business Intelligence, we work with View Sets that should provide the answers we are looking to obtain.
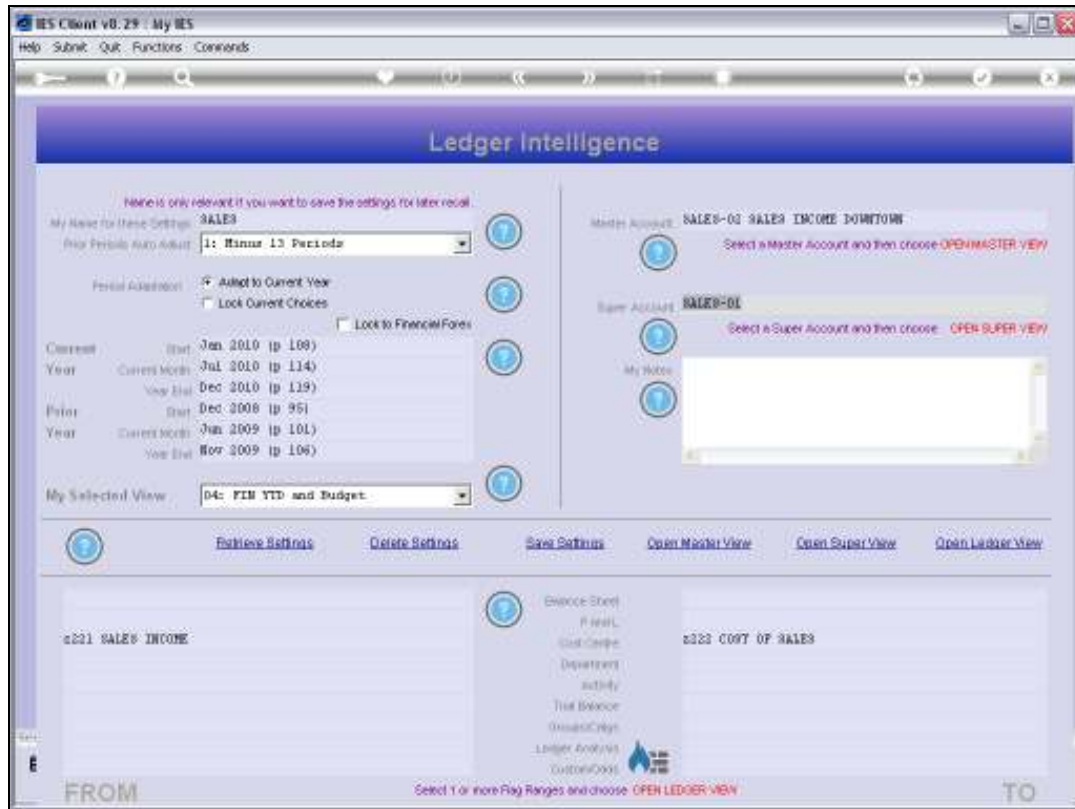
Slide 2

Slide notes: When we enter the BI system, our prior established View Sets are offered for selection, because they are re-usable. For example, if we have a 'Sales' View Set that reveal what we want to know about our Retail Sales, then we may want to use this same View Set again and again, week after week, or month after month.

Slide 3

Slide notes: Apart from selecting a View Set from the list, we can also choose a 'New View' and just work with that View on a dynamic basis, then save it as a View Set for re-use, or simply discard it after a working session.
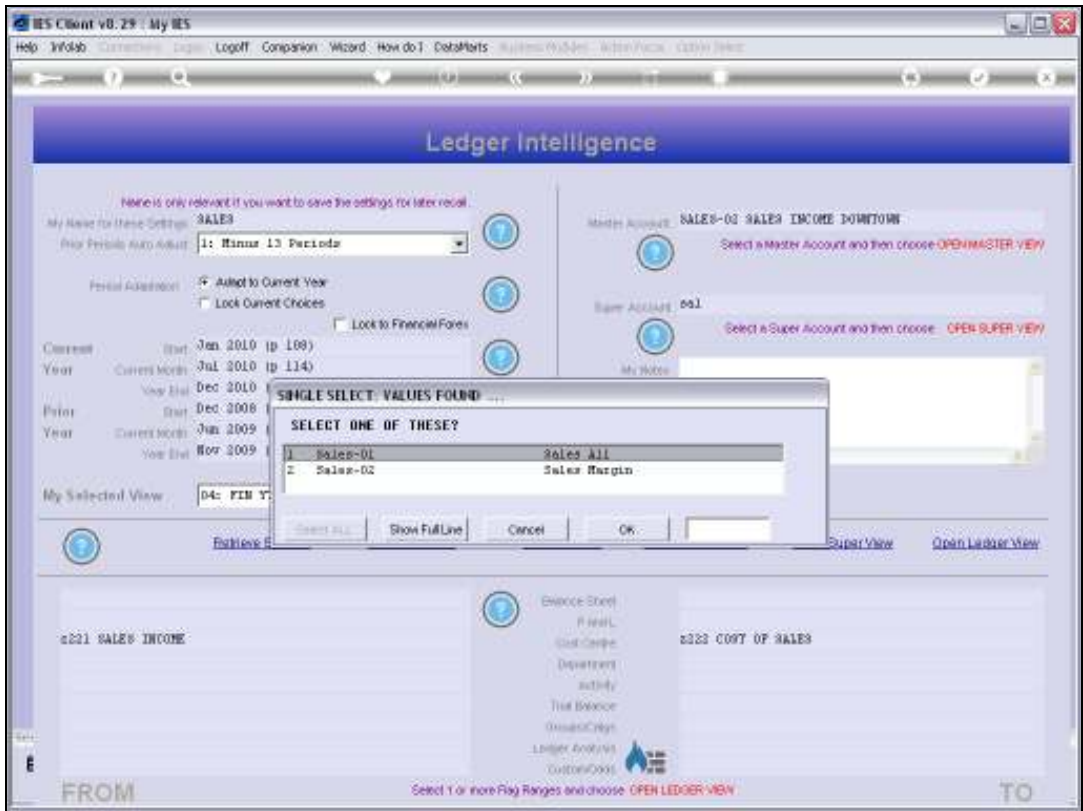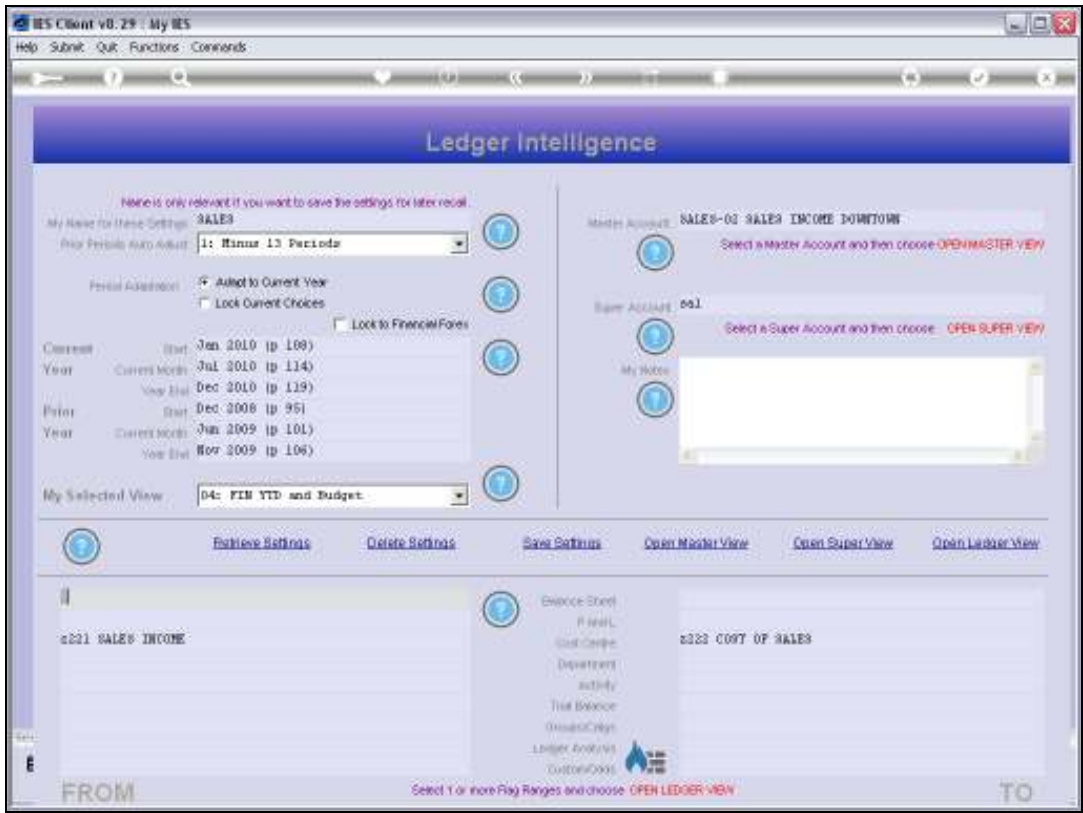
Slide 4

Slide notes: The Current View Set here includes Master, Super and Ledger Views. A Ledger View is a collection of GL Accounts that are selected by using the Chart of Accounts flags. A Master View is a Master Account that is established in the Chart, outside of BI, and is put together from any selection of GL Accounts. And a Super Account is also constructed in the Chart, and includes Master Accounts. So we have a veritable hierarchy of possible and available Views to use when we build a View Set.
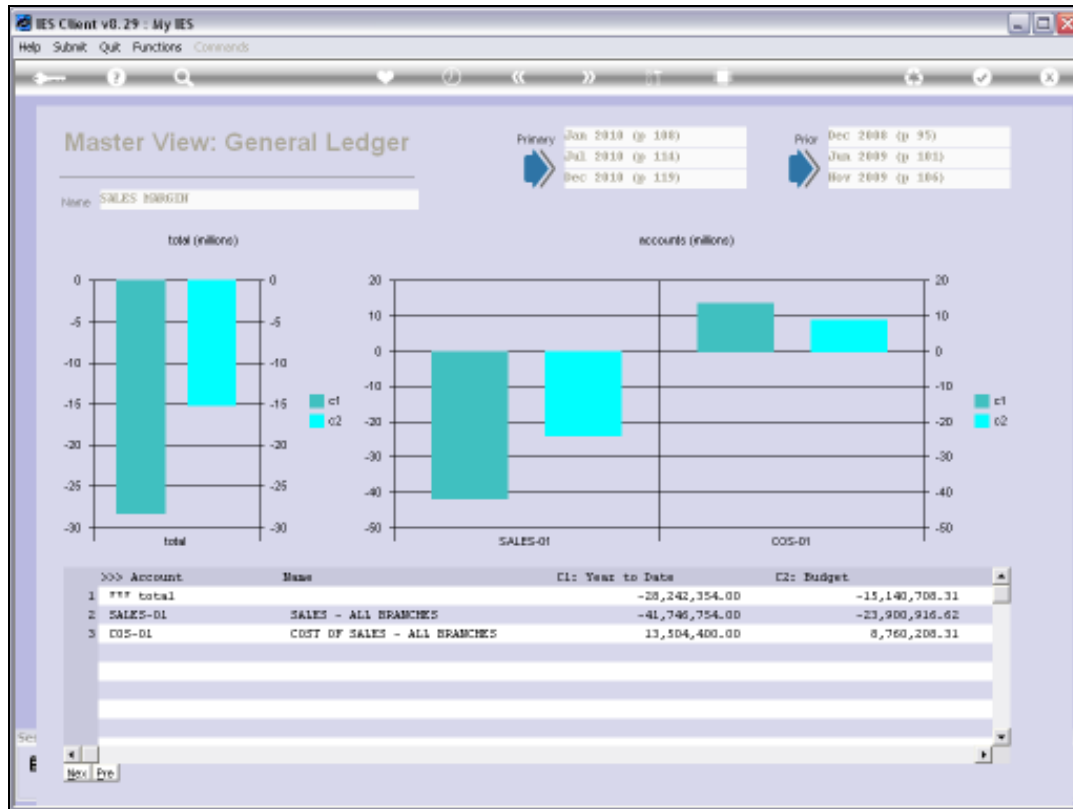
Slide 5
Slide notes:

Slide 6
Slide notes:

Slide 7
Slide notes:
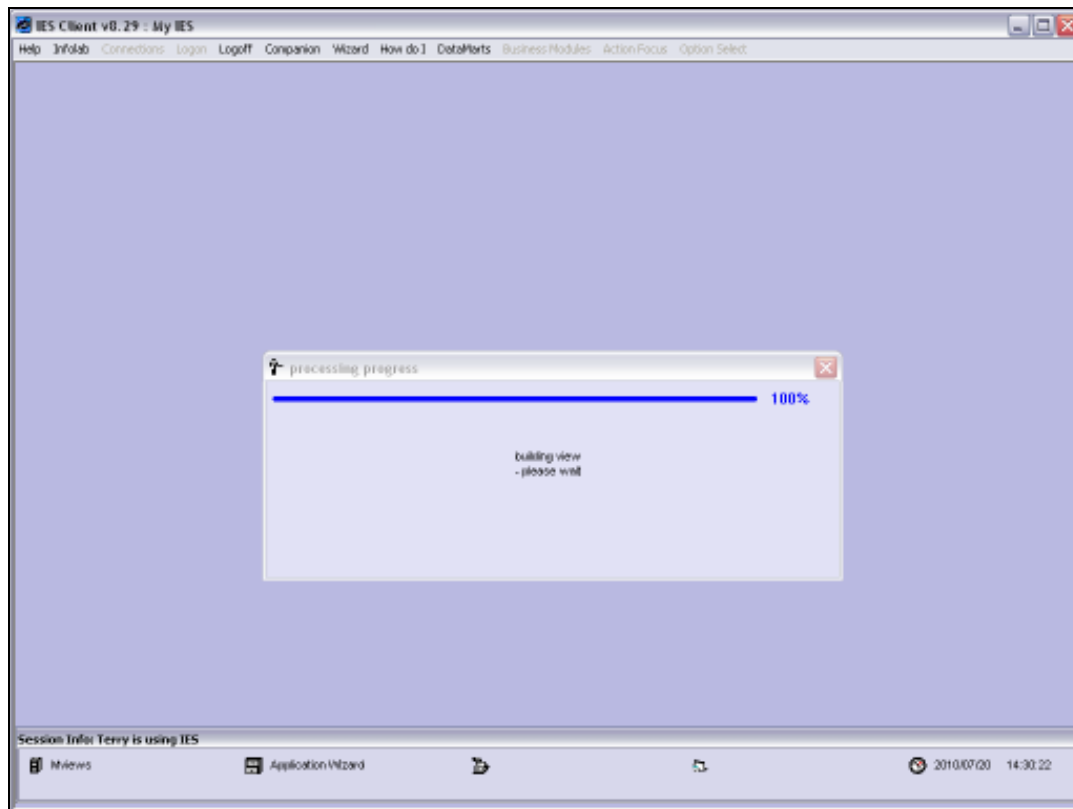
Slide 8

Slide notes:

Slide 9

Slide notes: Here is a quick example of a View when opened. In this case, the purpose of the View is to reveal the total Sales and Cost of Sales for all Branches of the Retail Enterprise, thereby revealing also the Net Income.
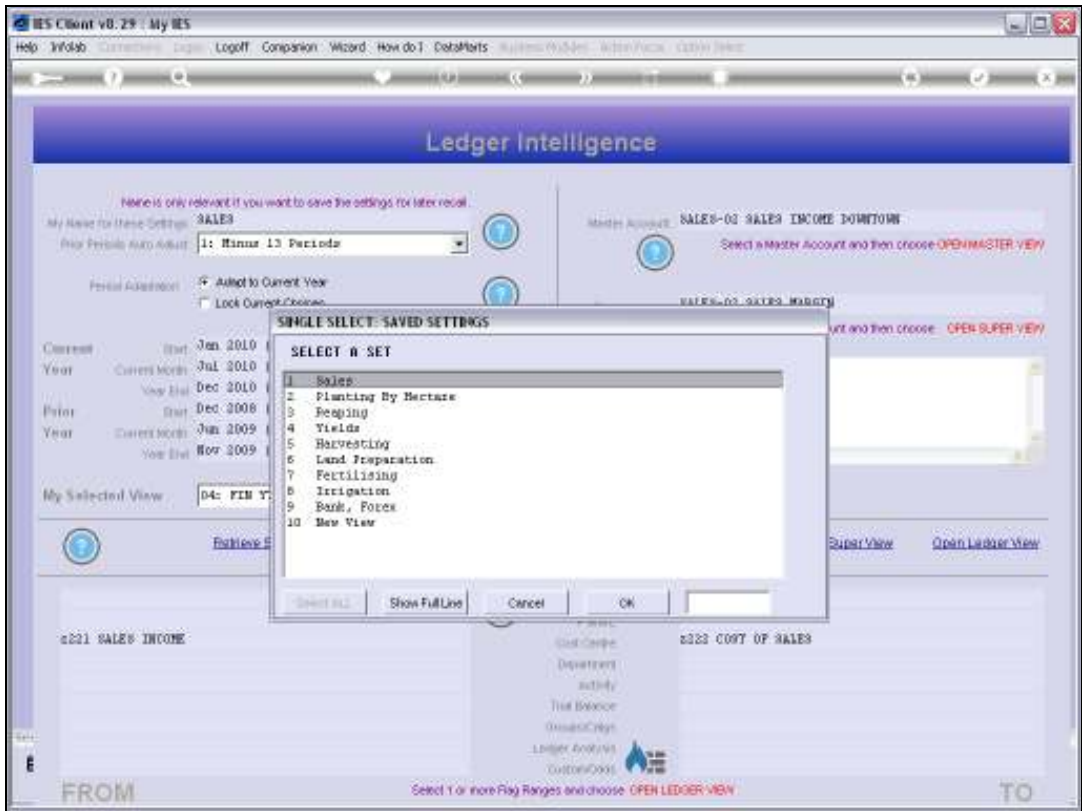
Slide 10

Slide notes: Any View that we construct and want to use again in future, we preserve by giving it a Name to recognize it by before we choose 'Save Settings'. The View Set will then always be available on the list when we enter BI or when we switch View Sets.
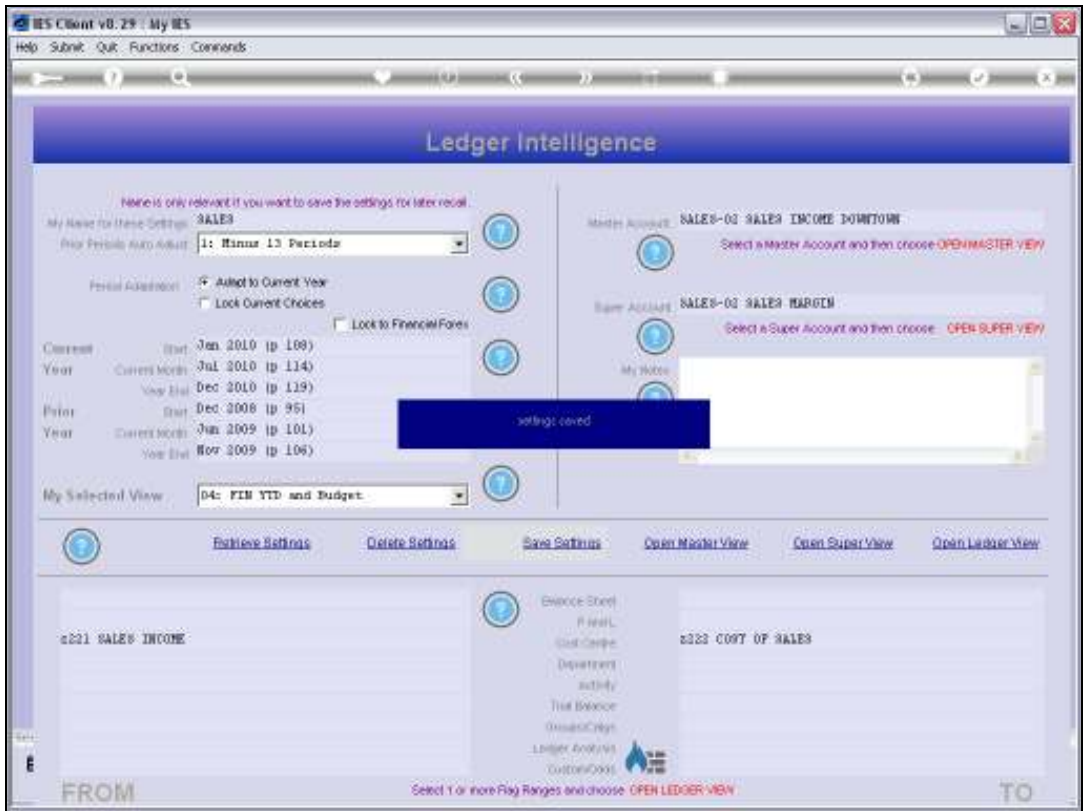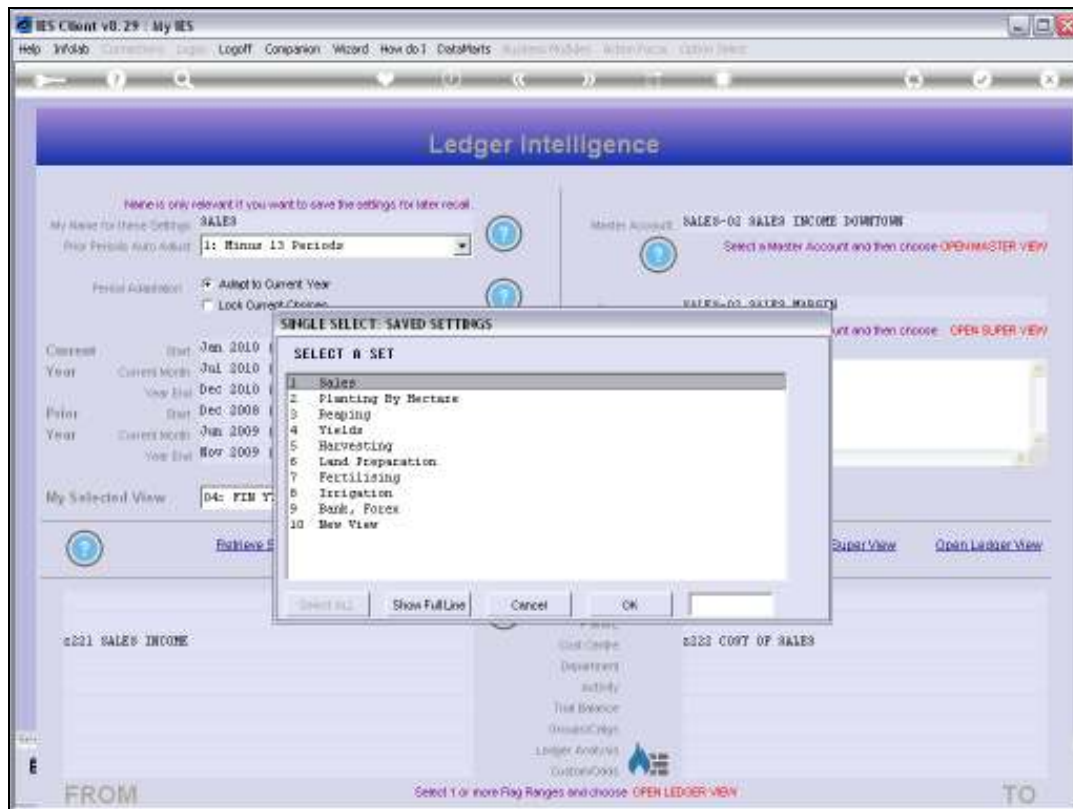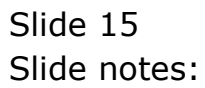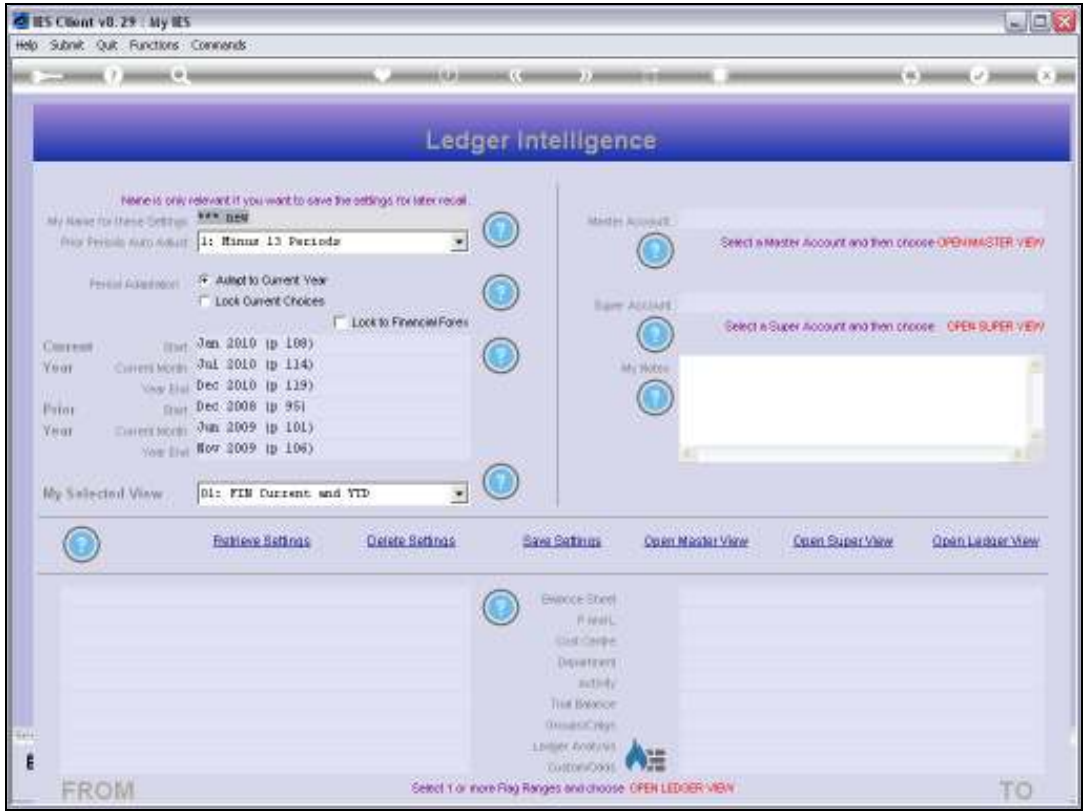
Slide 11
Slide notes:
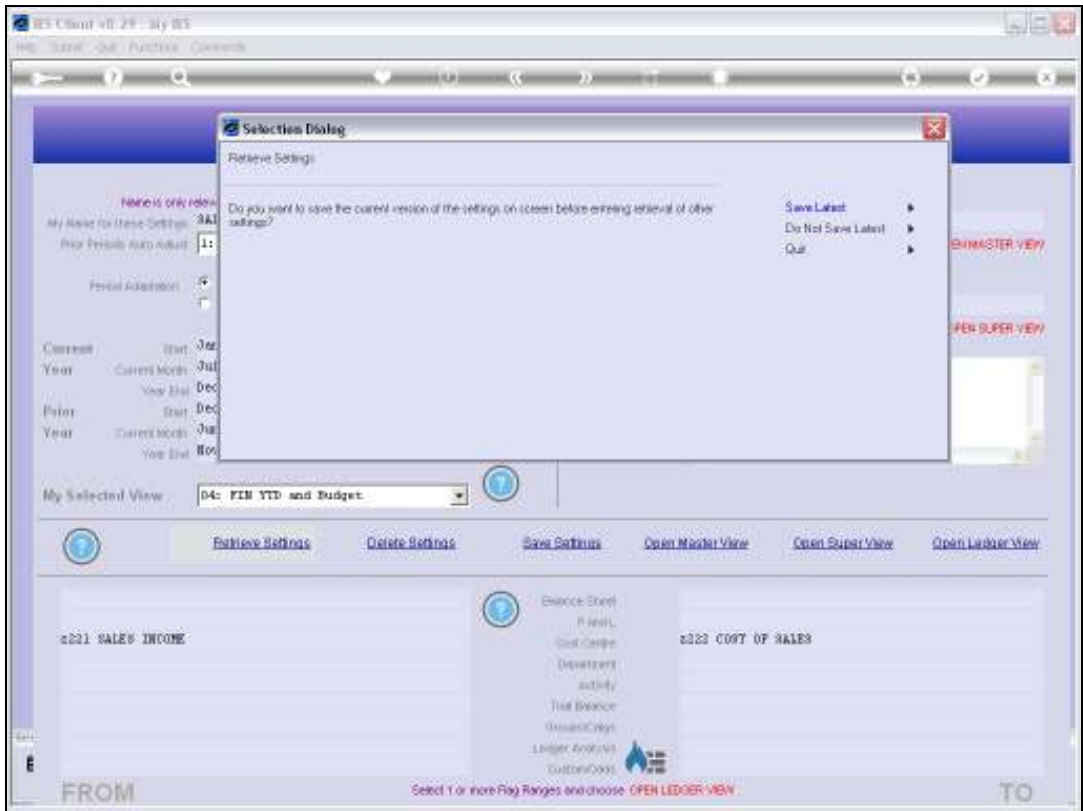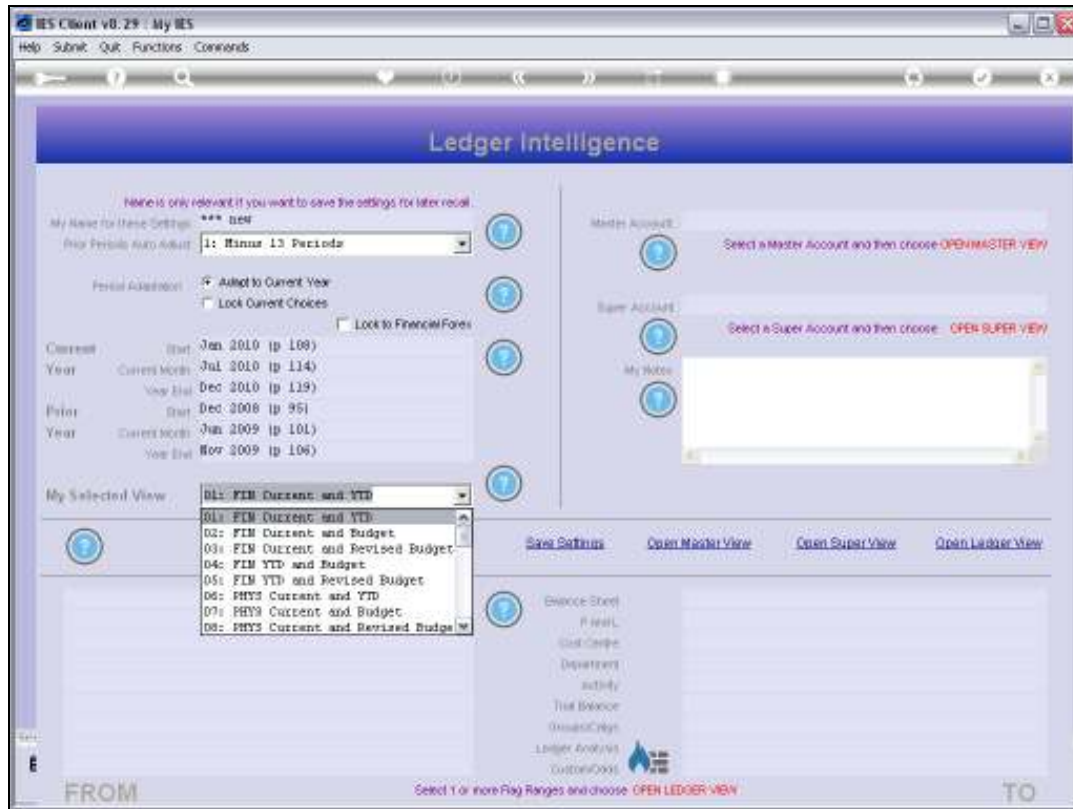
Slide 12
Slide notes:

Slide 13
Slide notes:

Slide 14

Slide notes: Now we do an example of establishing a new View Set.
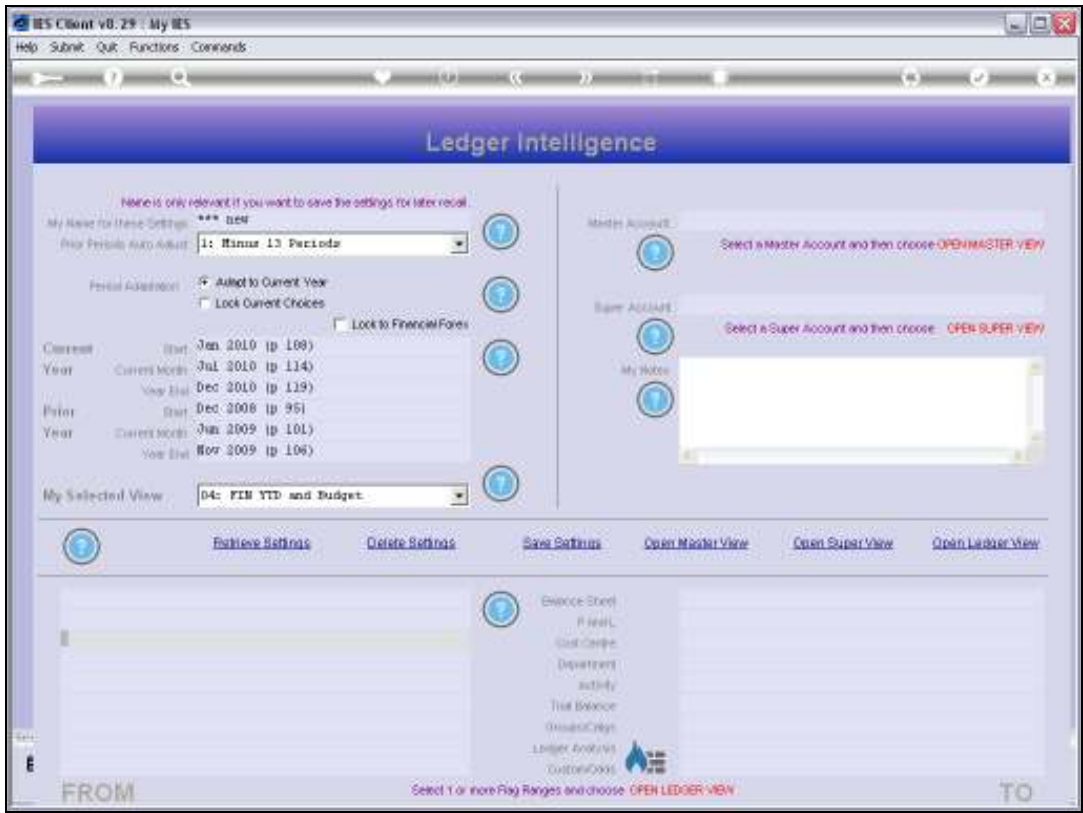
Slide 15
Slide notes:

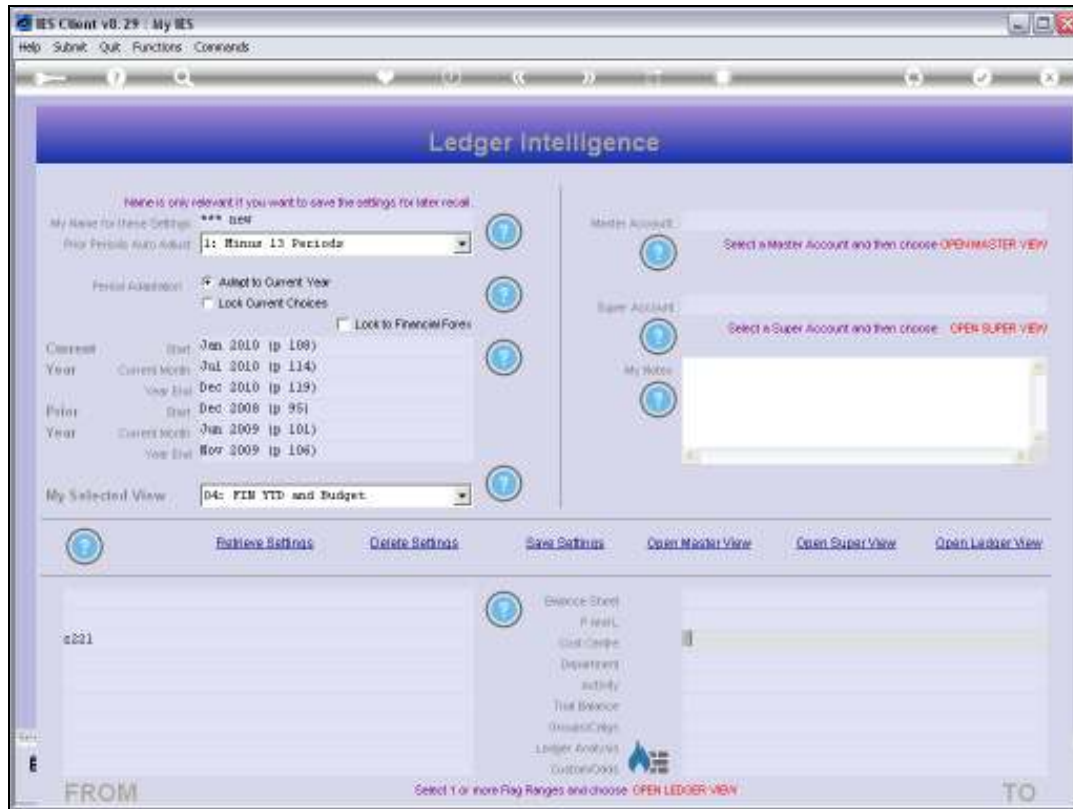Slide 16
Slide notes:

Slide 17

Slide notes: We choose the default Inner View which will be used whenever we open a Ledger, Master or Super View on this View Set. And the selected option is only the default, because we can select any of the other options on demand while using the View Set.
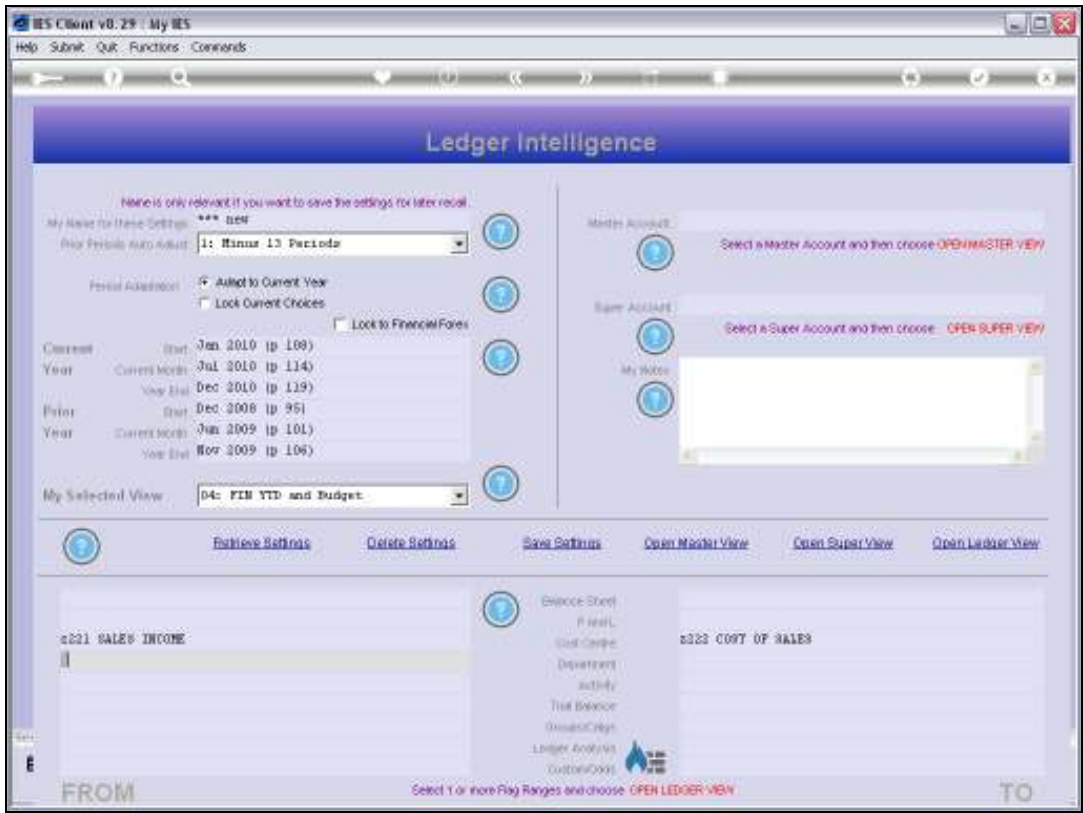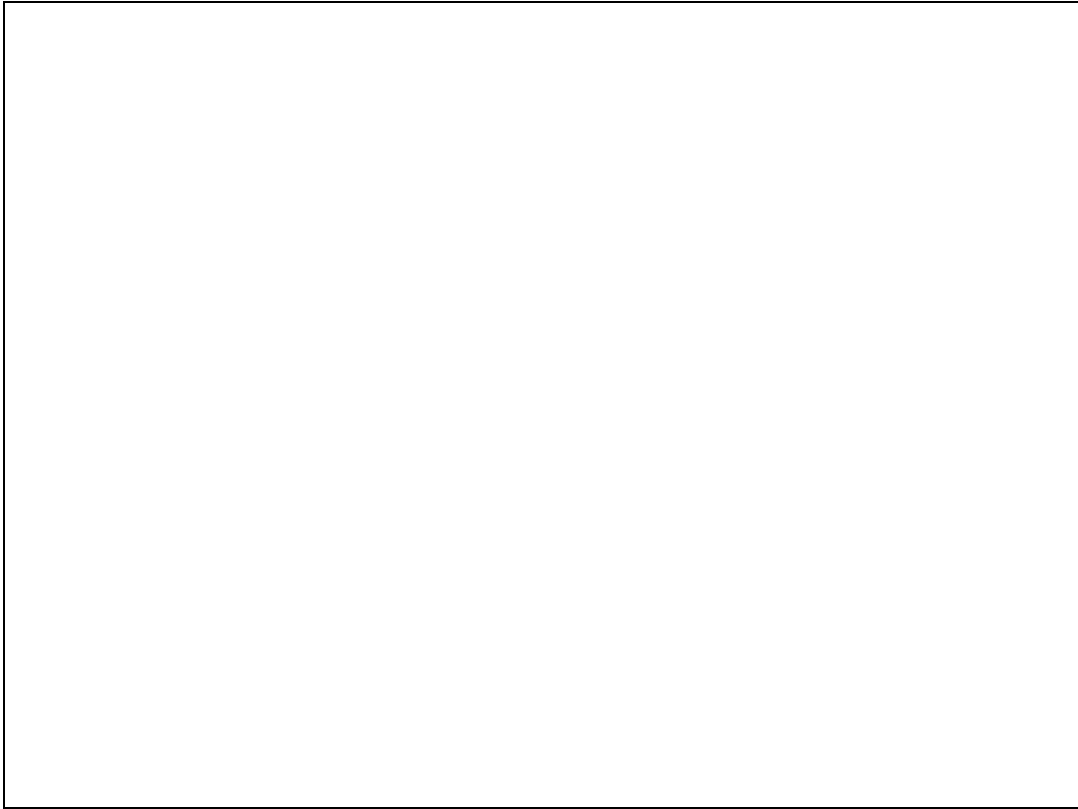
Slide 18
Slide notes:

Slide 19
Slide notes:

Slide 20

Slide notes: We can establish a Ledger Selection from the Chart for a Ledger View by using the Chart Flag options. If we do not know the Codes or Names we are looking for, then of course we can use the lookup. This is just an example.
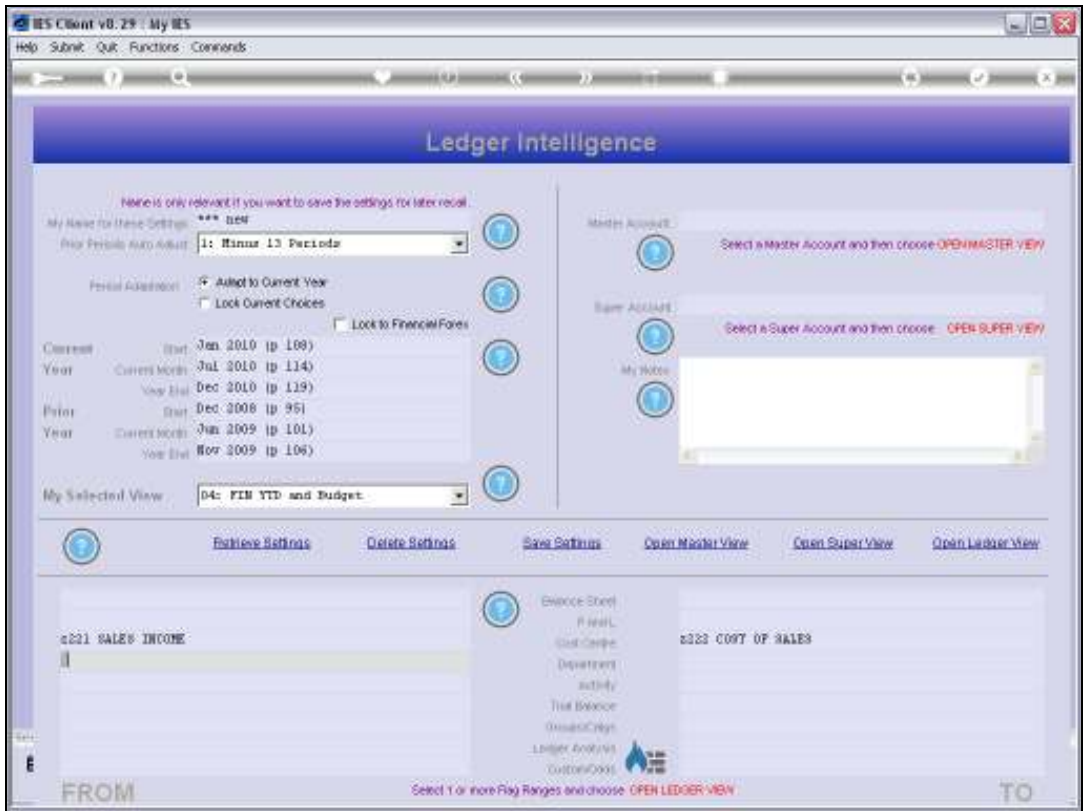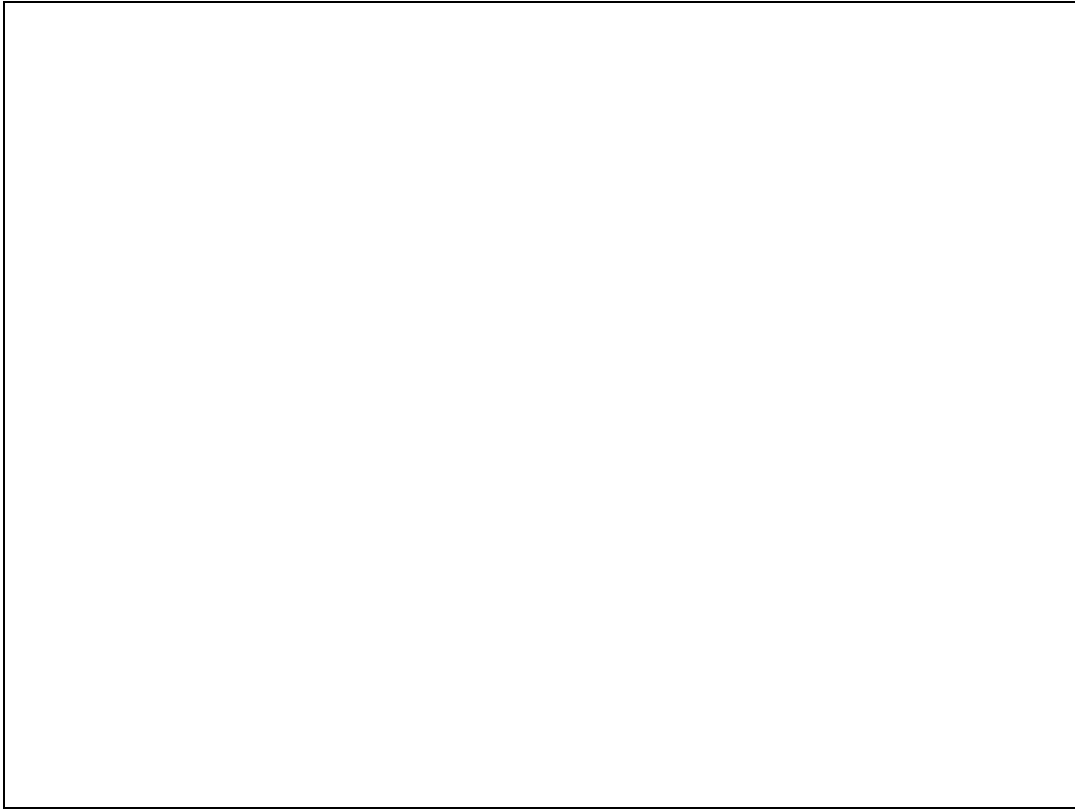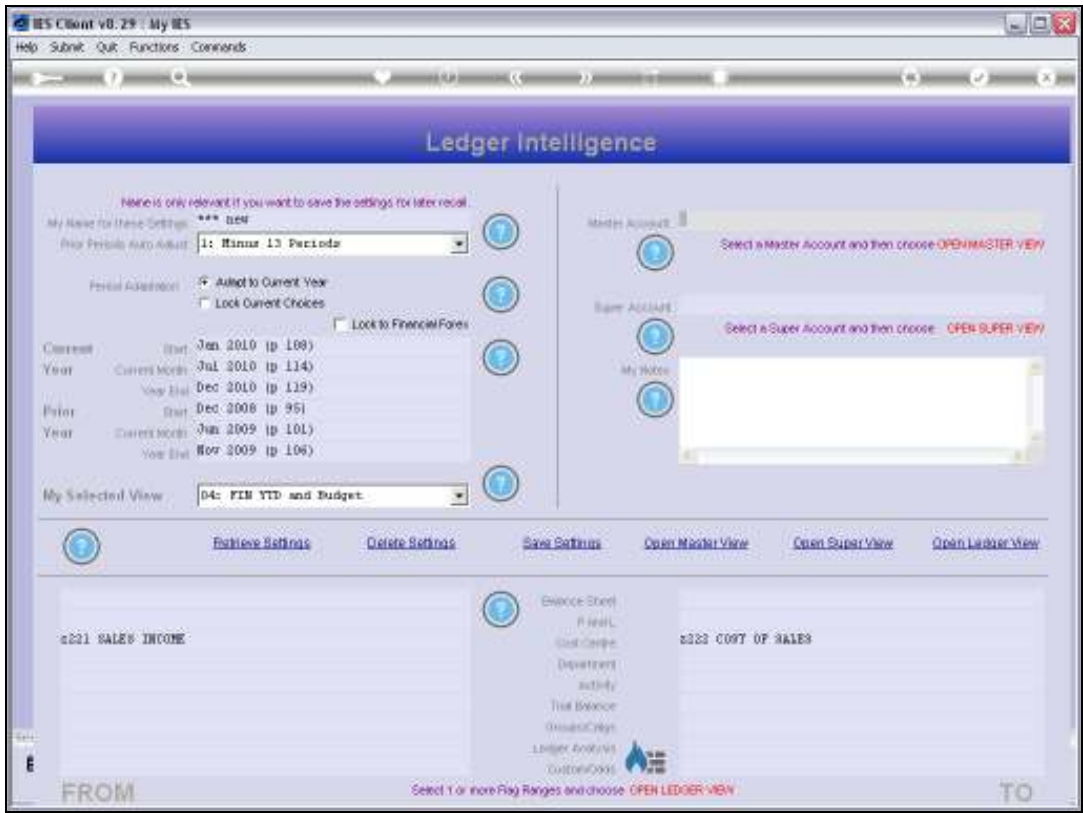
Slide 21
Slide notes:

Slide 22
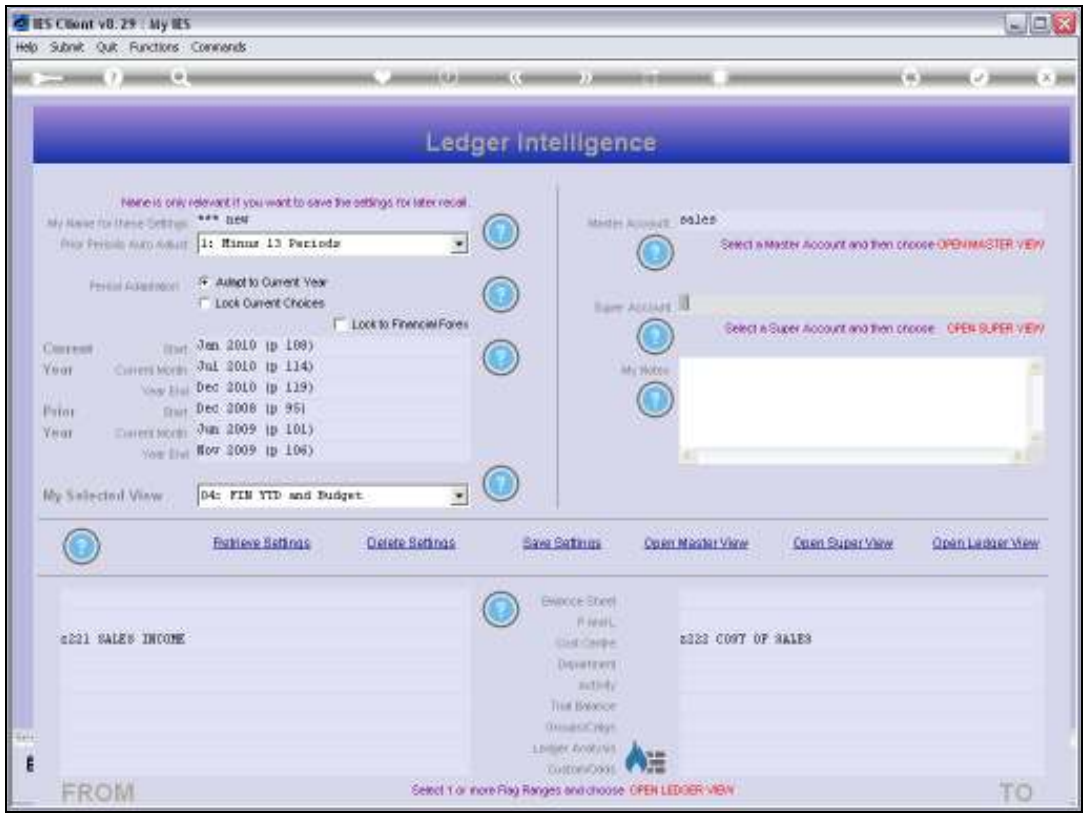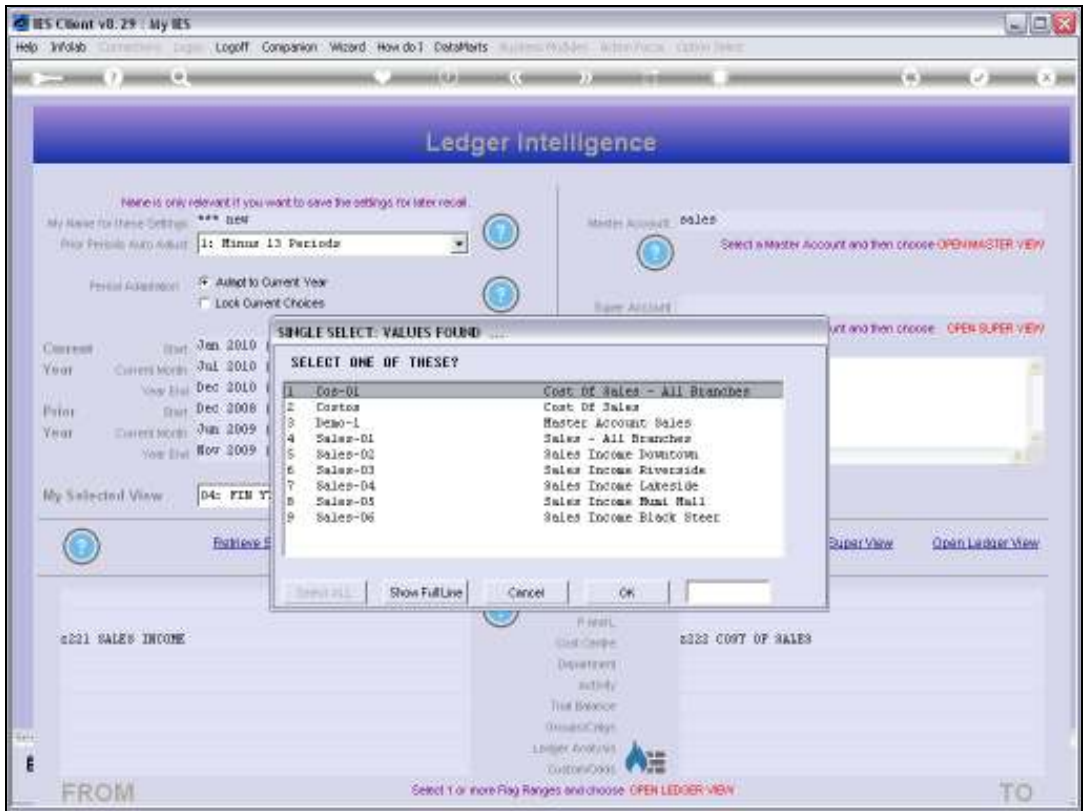
Slide notes:

Slide 23
Slide notes:

Slide 24

Slide notes: It is optional to include Master and Super views also.

Slide 25
Slide notes:

Slide 26
Slide notes:
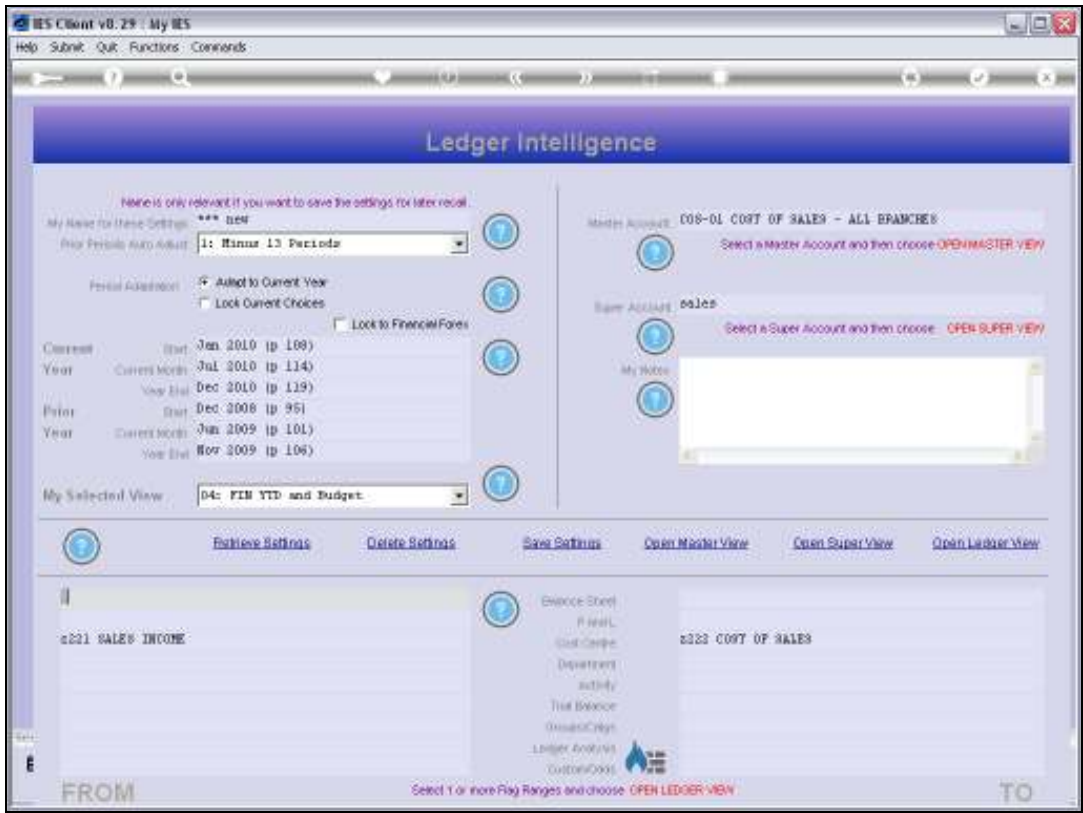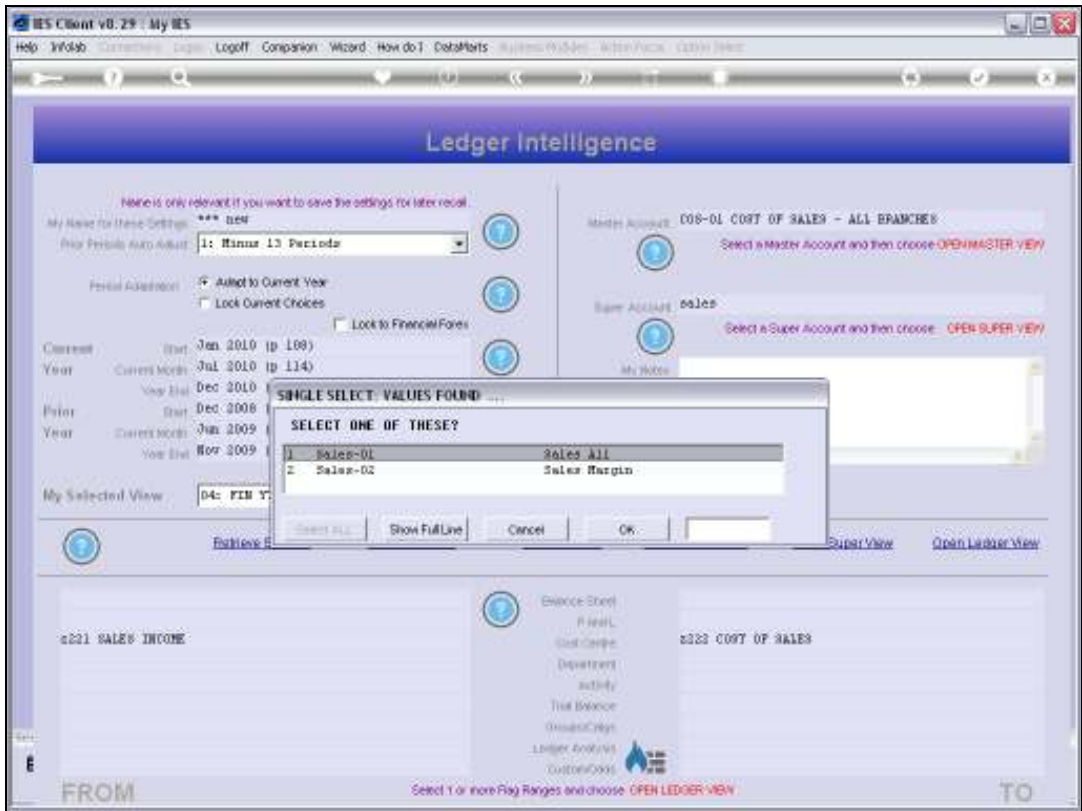
Slide 27
Slide notes:

Slide 28
Slide notes:

Slide 29
Slide notes:

Slide 30
Slide notes:

Slide 31

Slide notes: Since this is a new View Set, we want to give it some appropriate Name for future recognition.
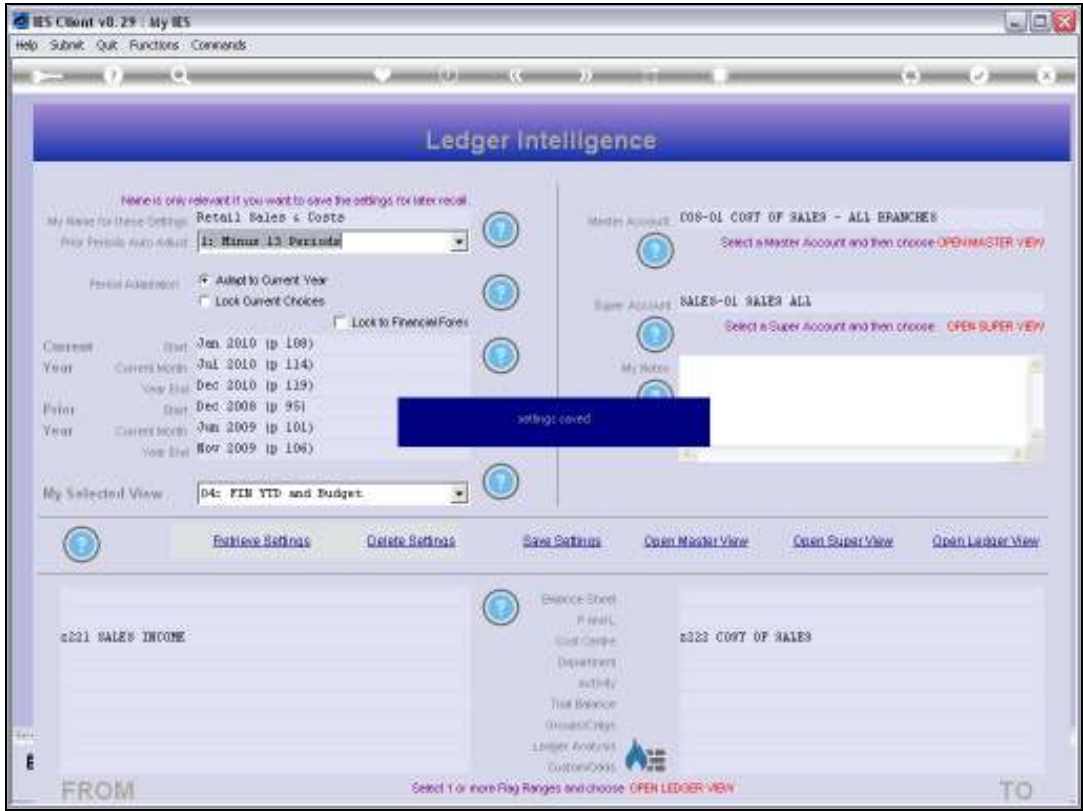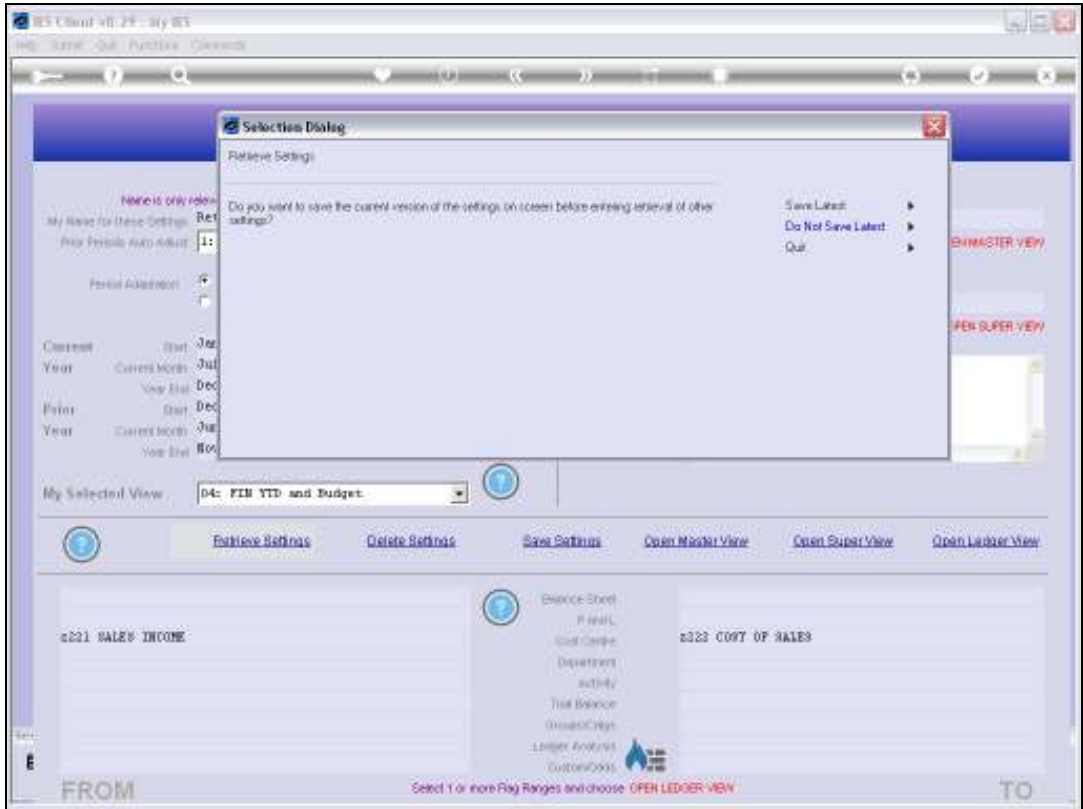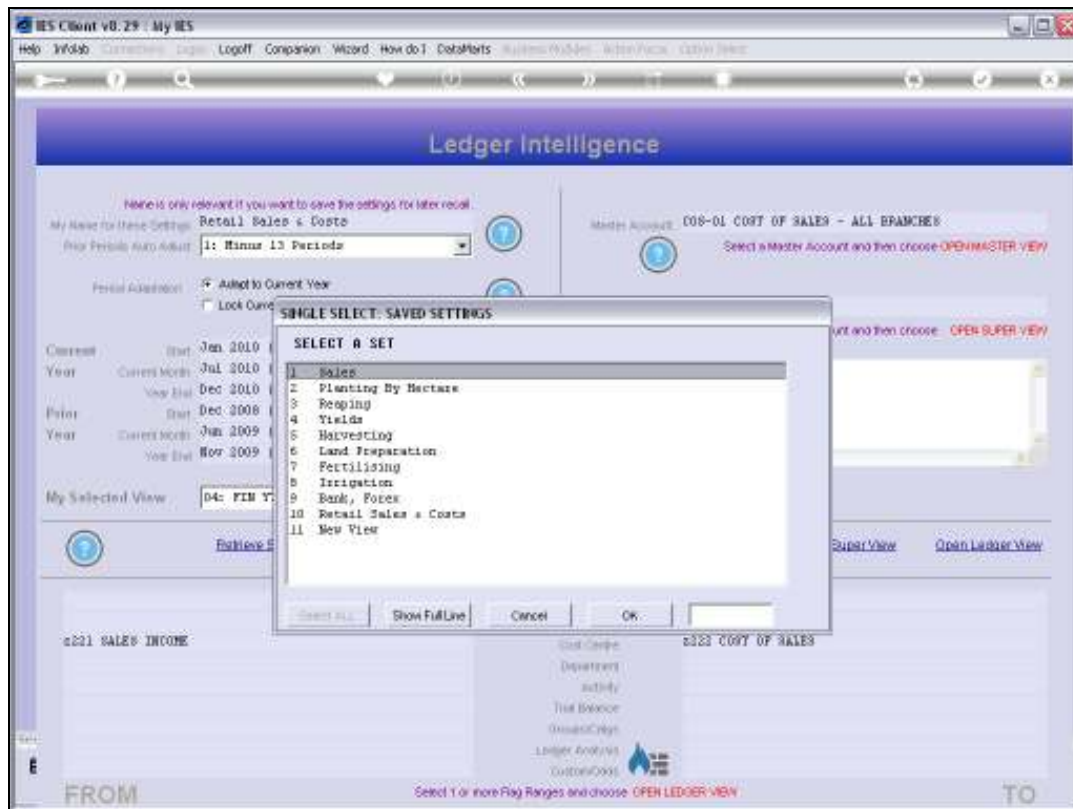
Slide 32
Slide notes:
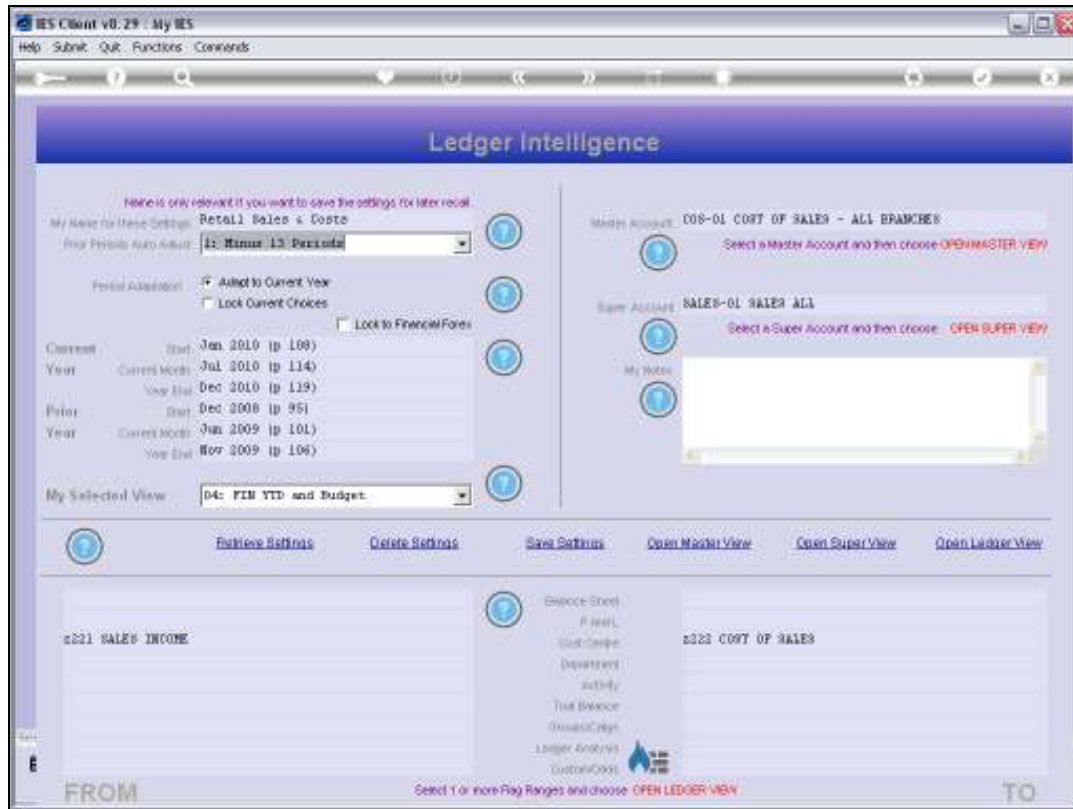
Slide 33

Slide notes: And then we choose 'Save Settings', which will create a entry on our list of View Sets.
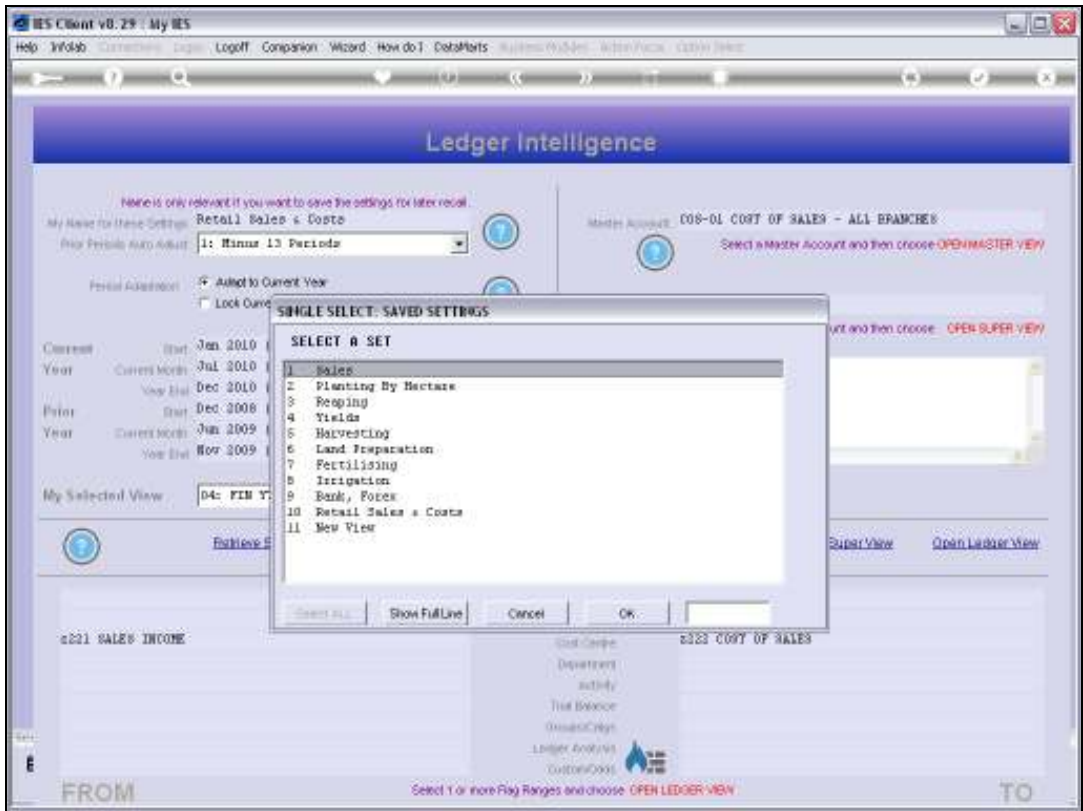
Slide 34
Slide notes:

Slide 35
Slide notes:

Slide 36

Slide notes: So when we switch View Sets now, we will see our new entry on the list.

Slide 37

Slide notes:

Slide 38
Slide notes:

Slide 39

Slide notes: A View Set may be temporary for the duration of the current Session only, or it may be SAVED as a View Set on our User List of View Sets, for re-use. Whichever way, we construct and use View Sets to find answers to the questions that we wish to put to the BI system.