Business Warehouse Web Reporting (BW Web Reporting) BEX_300 Online Course

Course Overview

This course will introduce you to the IRIS Business Information Warehouse (BW): Business Web Reporting (BW-Web) application. You will view some existing queries and learn various ways to change them using the features provided, as well as learn how to save different views of the data. The objective is to provide you with the tools and knowledge to run, modify, and save your BW-Web views.

This course must be part of your training plan and you need specific roles issued to you in order to have access into the training area of BW Web Reporting.

Before proceeding make sure that you have completed the BW Web Reporting Access Request Form and you have received a conformation that you can begin.

Course Objectives

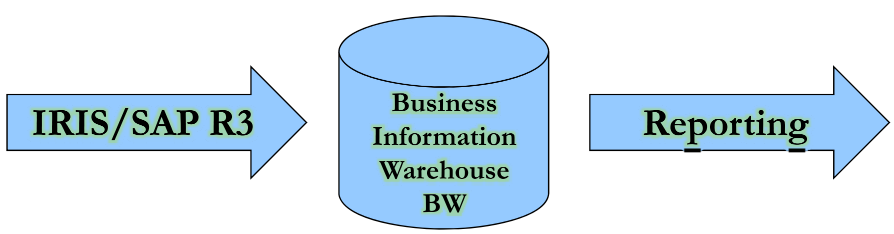
- View some existing BW queries
- Understand the variable screen and elements
- Learn ways to change queries
- Review various features of BW-Web Reporting
- Learn how to save different views of the data
- Learn to export your report to Microsoft Excel

There will be an assessment at the end of class that covers the concepts and actions that you practice in class. After successfully completing the assessment, you will be given access to run the BW-Web queries associated with your role as assigned by your Area Security Officer (ASO).

As you proceed through this course, follow and practice what is shown in BW Web Reporting.

What is Business Warehouse?

Business Warehouse is a separate system from the IRIS (SAP/R3) system and is used to generate various reports from data that is imported (copied) from IRIS into BW on a nightly basis. The data in BW is only as current as of the time it was copied into BW. Therefore, entries made into IRIS today will not appear on your BW report until the next data import is done.



You use the *my*UK Portal to access BW Web Reporting (BW-Web) to produce BW Reports.

What is BW-Web?

Business Web Reporting, known as BW-Web, is used to describe the application that allows you to access queries that have already been created using the Business Explorer (BEx-Web) application and are being provided to you based upon your role. These queries were designed with the flexibility to allow you to simply run them in their original format or change them to better meet your needs. You can modify a query in various ways:

- Select or enter values for variables/parameters
- Sort the report
- Add filters
- Change the layout of the columns and rows

What is Required to Access BW-Web?

- **Web Browser** – You access and view this information on the Web, so you need Microsoft Internet Explorer 6.x or higher web browser.
- Firefox and Netscape can cause difficulties.
- Please note that other browsers may behave differently on Apple and Linux systems.

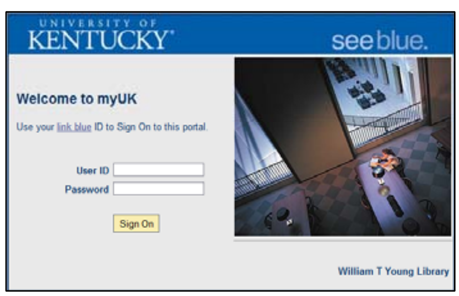
- **Active Directory Account** – You need an Active Directory Services Account (with domain of either ad or mc) to log onto the ***my*****UK** Portal.
- Please contact the IT Customer Service Center at 257-1300, option 1, for information on obtaining an AD account.

What Version of IE is on Your PC?

To find the version of Internet Explorer:

1. Open Internet Explorer
2. On the Internet Explorer toolbar, click Help
3. On the menu that appears, click on About Internet Explorer
4. The version number will be displayed. If it is not equal to or greater than version 6.0, contact your technical support person to have your browser upgraded.

How to Access the myUK Portal



1. Open the ***my*****UK** Portal at https://myuk.uky.edu/irj/portal
2. Enter your **AD User ID** (do not enter the domain)
3. Enter your **Password**
4. Click on the **Sign on** button

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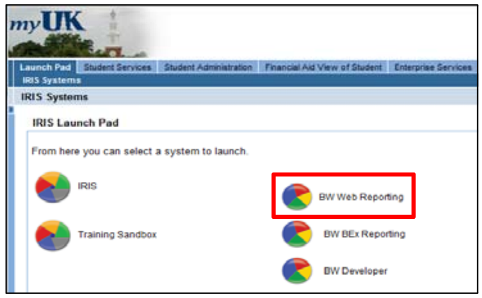
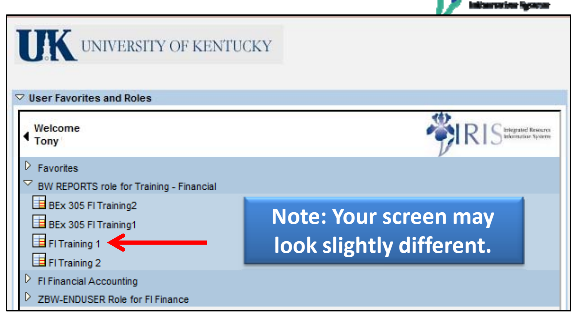
Using the myUK Portal



- Your portal screen might look different – what you see is determined by your IRIS access or role
- The portal itself is a work in progress and will change
- Click on ***BW Web Reporting***
- If you do not have the **BW Web Reporting** link you do not have the access required to take this course. Please submit the **BW Web Reporting Access Request** form for appropriate access.

BW Reporting

User Favorites and Roles



- This is where you see the queries available to you, based on your IRIS role.
- **Favorites** – Nothing will be shown in Favorites in BEx-Web
- **FI Financial Accounting** – These are role-based queries (reports). Everyone who has your role/access will see the same queries in this area.
- **BW Reports role for Training – Financial** – Reports used for training are located in this area. The reports used for BW Web Reporting are:
  - FI Training 1 – Used for practice during online course
  - FI Training 2 – Used for the assessment
- Single click **FI Training 1** report

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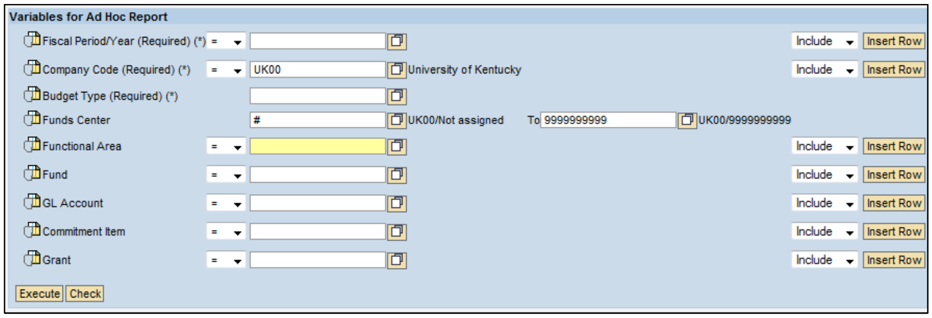
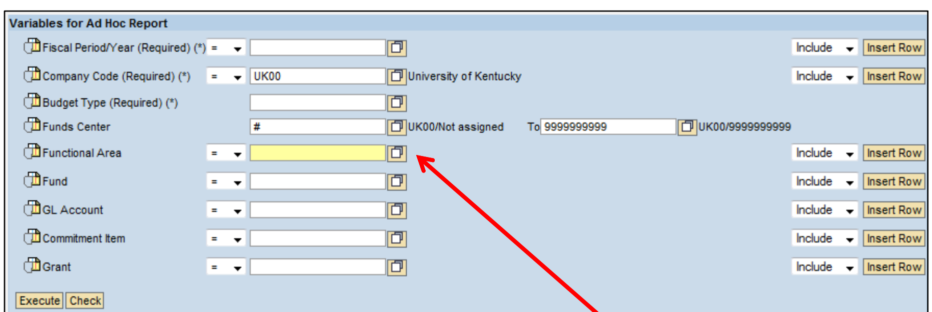
Variables for Ad-Hoc Report

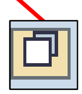


The **Variables for Ad-Hoc Report** screen gives you a list of the variables (available parameters) for a particular query. By completing these variables or parameters, you can narrow down the data selected to include exactly what you what to display on your report. For example, you may not want to see ALL fiscal years or periods or ALL Funds Centers, etc. This screen allows you to enter criteria to select one or more values for the variables

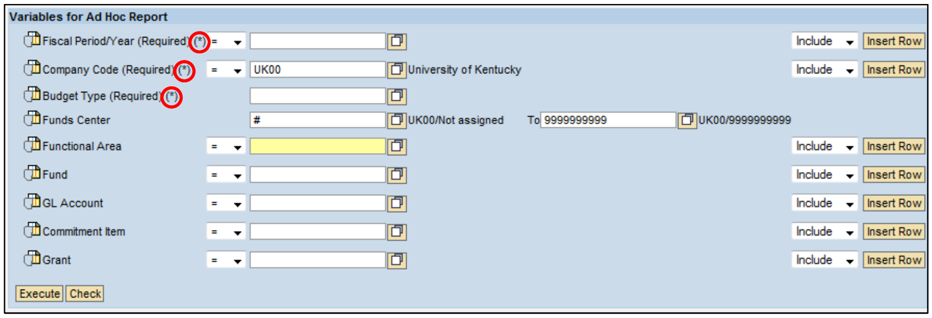
Entering Your Variables



There are two ways to enter a variable:

- Type the data directly into the field, or
- Click on the **Selection** button to the right of the field  to display a list from which to choose

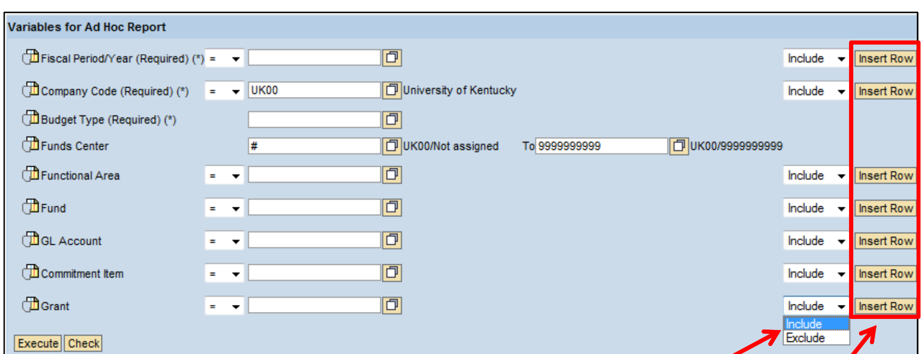
Required Variables



IMPORTANT: Variable names followed by an asterisk **(*)** are **required** – you **MUST** enter information into these fields!
For example, required variables shown above are **Fiscal Period/Year** , **Company Code**, and **Budget Type**

Multiple Selection

The Multiple Selection feature provides additional choices for selecting your criteria

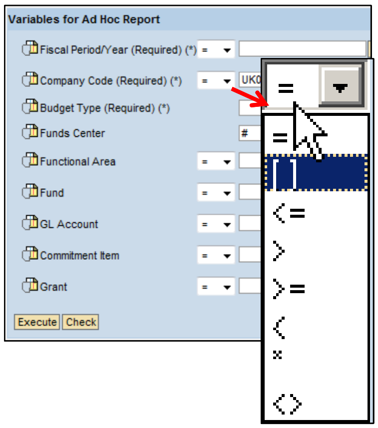


You can:

- Choose to **Include** or **Exclude** a filter selection
- Choose to add selections for a variable by clicking on **Insert Row**

Variable Operators

You can choose from the following **operators** for each field:

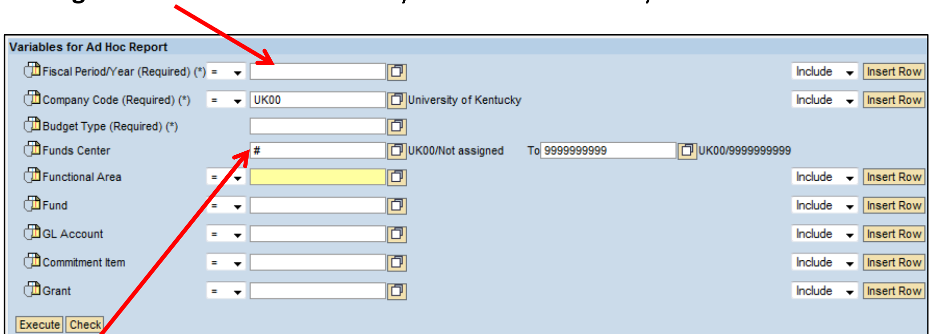


= equal to
[ ] range
<= less than or equal to
> greater than
>= greater than or equal to
< less than
*** wildcard**
<> not equal to

Note: The Wildcard Operator does not work with variables that refer to a time period, like Fiscal Year/Period.

Selection Types

A **single selection** variable allows you to enter one entry



A **range selection** has a “from” area and a “to” area with a Selection Button for each

If you have the same value in both areas, you can use this as a single selection.

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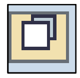
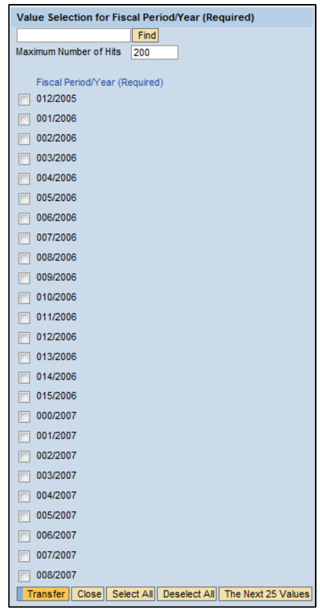
Selection List

- When you click on the Selection button in a field, a list of possible entries will appear.





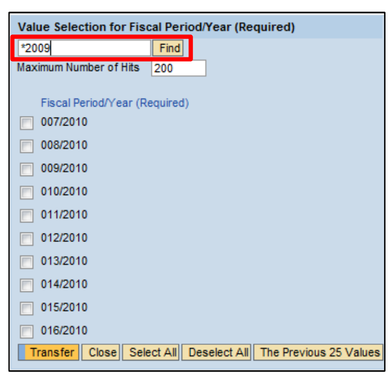
- Make your selection(s) by clicking in the checkbox to the left of each entry.
- For example, the graphic on the right shows some of the available entries for the variable Fiscal Period/Year.
- To see more entries, click on "**The Next 25 Values**" button.

Your choices include the following:

- You can "**Select All**" of the values in the list
- *OR* just specific ones via the **checkboxes**
- *OR* change your mind and "**Deselect All**"
- *OR* fine-tune your selection by using the "**Find**" feature.

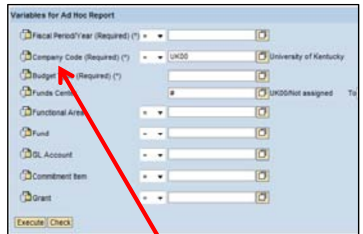
Select – Find – Transfer

- To more quickly locate desired values in a list, you can use the **Find** feature.



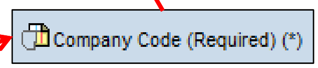
- Enter your search criteria in the Find field. Use the * (asterisk) as the wildcard character.
  Example: To find the valid entries for the fiscal year 2009, enter *2009 and then click on the Find button.
  NOTE: Find IS case sensitive
- When the results appear, you can click on **Select All** or **checkmark** the entries you want.
- When you have specified what you want, click the **Transfer** button to add it to your variables.

Personalization

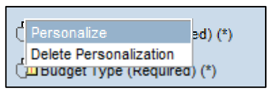


If you find yourself entering the same criteria for a variable again and again, across multiple queries, you can set a personalization on that variable so the criteria will be used automatically for every query that uses it.

For example, if you only use Company Code UK00, you can set up this range as the default



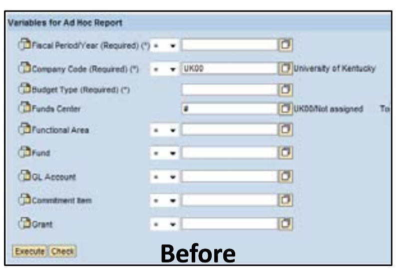
1. Right-click on the **Personalization** icon to the left of the field name
2. Select **Personalize**.

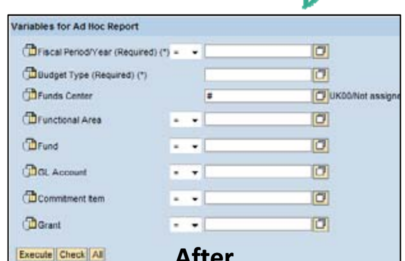


3. The screen flickers and the Company Code field disappears.

You have given the system a default entry for the Company Code field and removed that field from consideration

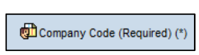
Personalization (Continued)





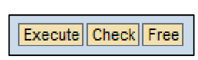
To see what is entered in a personalized field, click the **All** button

The icon has changed



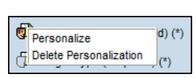
to indicate that the variable is personalized. You can now change the variable for this execution of the report

To re-hide the variable, click the new **Free** button



at the bottom of the Variables screen

To delete a personalization, right click the



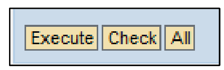
icon and select **Delete Personalization**

Personalization Reminder

Personalization is meant to save you time and key strokes. However, since it is an automatic way of setting a variable, it does affect the reporting results. When running regular reports, it is easy to forget that you have "personalized" a particular variable or parameter!

If you are getting unexpected results or if your Variables screen looks different from another user's screen, check for Personalization.

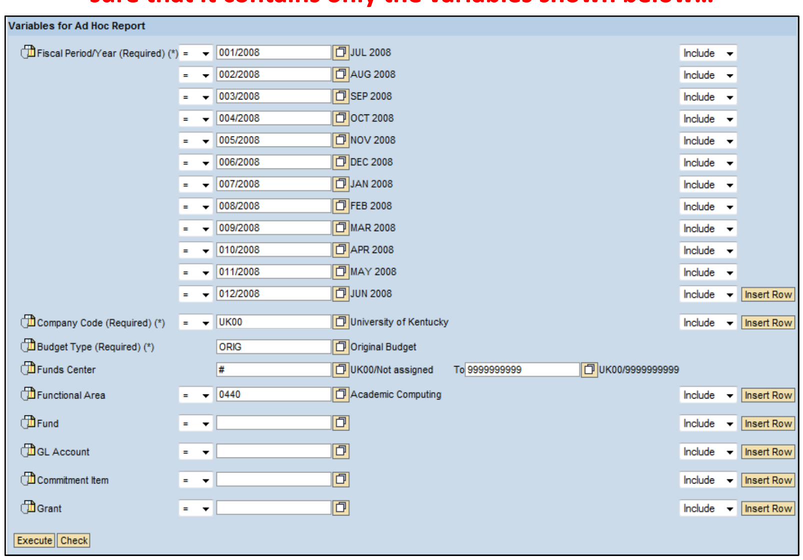
If your Variables screen shows the "All" button, there is ***at least one*** Personalization set.



Before proceeding make sure that you have deleted all personalizations.

Verify Variables

Before proceeding, check you variable screen and make sure that it contains only the variables shown below…


Variables for Ad Hoc Report

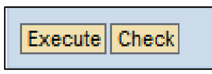
Fiscal Period/Year (Required) (*)	=	001/2008	JUL 2008		Include	
	=	002/2008	AUG 2008		Include	
	=	003/2008	SEP 2008		Include	
	=	004/2008	OCT 2008		Include	
	=	005/2008	NOV 2008		Include	
	=	006/2008	DEC 2008		Include	
	=	007/2008	JAN 2008		Include	
	=	008/2008	FEB 2008		Include	
	=	009/2008	MAR 2008		Include	
	=	010/2008	APR 2008		Include	
	=	011/2008	MAY 2008		Include	
	=	012/2008	JUN 2008		Include	Insert Row
Company Code (Required) (*)	=	UK00	University of Kentucky		Include	Insert Row
Budget Type (Required) (*)		ORIG	Original Budget			
Funds Center		#	UK00/Not assigned	To 9999999999 UK00/9999999999		
Functional Area	=	0440	Academic Computing		Include	Insert Row
Fund	=				Include	Insert Row
GL Account	=				Include	Insert Row
Commitment Item	=				Include	Insert Row
Grant	=				Include	Insert Row

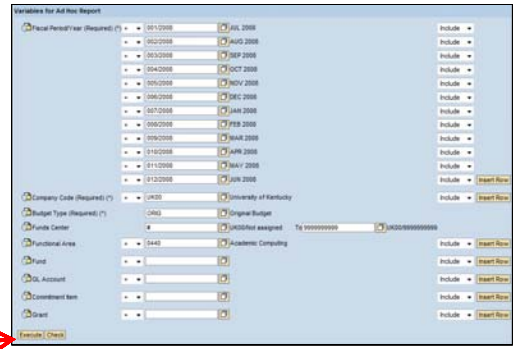
Execute Check

Check and Execute

After you specify your variables, click on the **Check** button and the system will check your specifications for errors.

Yellow system messages can be ignored, but red system messages indicate errors that must be fixed before your report can be produced.





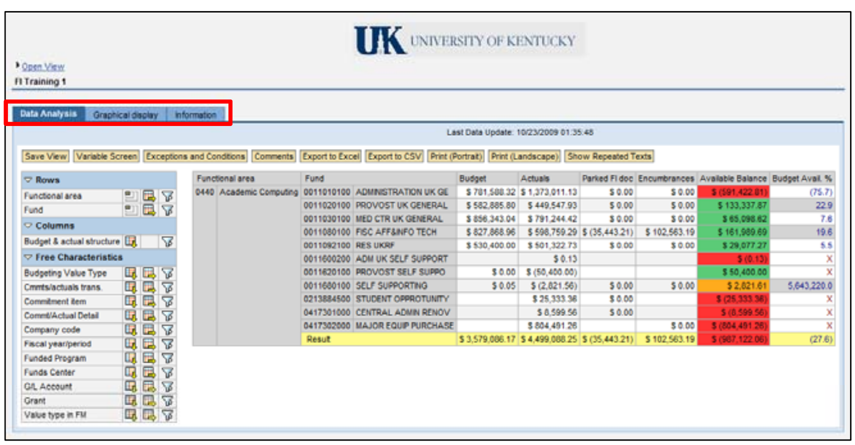
Checks only the format – not the values

When there are no errors, click on the **Execute** button to run your report.

Be patient while your query is being processed.

A new screen will appear displaying the data you specified. This is your report.

The BW Report

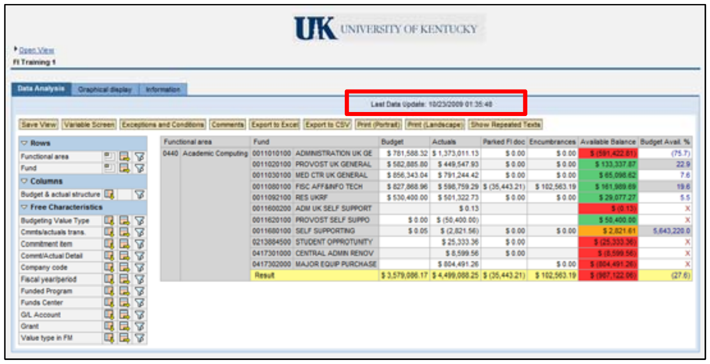


Data Analysis Tab – Your data appears on this tab.

Graphical Display Tab

Information Tab

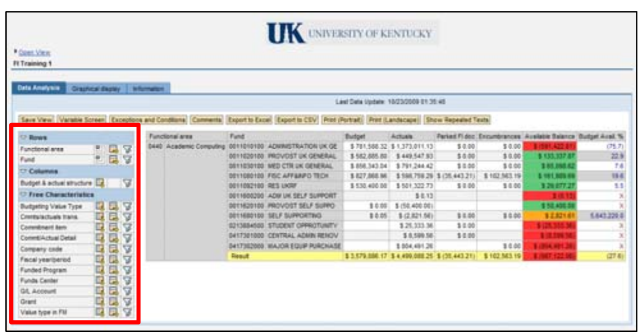
Last Data Update



When your report appears, check the **Last Data Update** date at the top of the screen. This date is the last time data was updated in BW.

If you are looking for information that was entered **after** the most recent BW update, it will not be included.

Rows – Columns – Free Characteristics



- The left portion of the screen features a panel that allows you to tweak the fields in **Rows**, **Columns**, and **Free Characteristics**.
- The Rows section specifies fields shown horizontally in the report.
- The Columns section specifies fields shown vertically in the report.
- Rows can be changed to columns and columns can be changed to rows.
- Free Characteristics are fields that are **not** shown in the initial report but are available if you want to show them.
- You can **drill down**, **drill across**, and/or apply a **filter** to these fields.

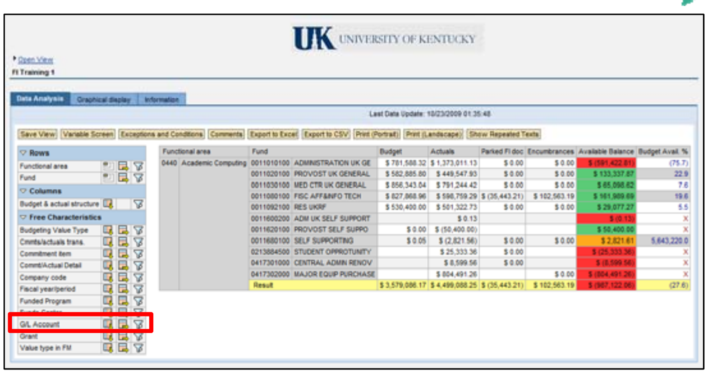
Rows – Columns – Free Characteristics *(Continued)*

Characteristics versus Key Figures – Views may contain descriptive types of data as well as dollar amounts or units which can be counted or summed. In BW, dollar amounts or units are referred to as key figures. Key figures typically will be displayed in columns. Characteristics are non-amount values or values that describe what a key figure represents. Characteristics are often displayed in rows.

Structure – Some data elements are grouped together in what is referred to as a "structure" because the elements are closely related or dependent on each other. In the our example view, the Budget and Actual Structure is one such example and contains the fields: *Budget, Actuals, Parked FI doc, Encumbrances, Available Balance, and Budget Available %.* Choosing a Structure will provide you with all of the associated fields in that Structure.

For additional information on Report Navigation go to the BW Documentation site http://www.uky.edu/IRIS/BW/bw_documentation.htm

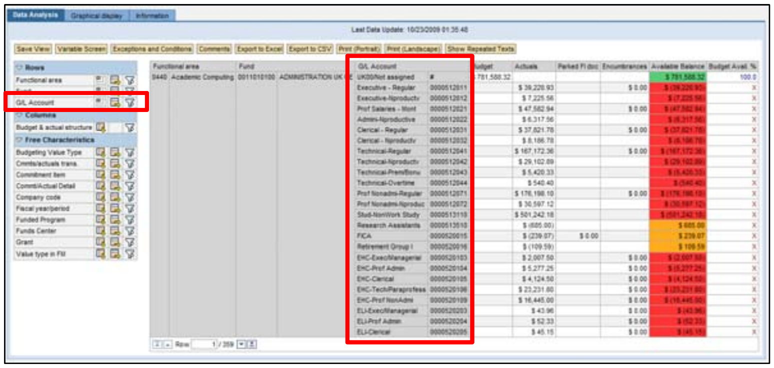
Drill-down



Drill-down adds a breakdown of data horizontally (in rows).

Example: To show GL Accounts in rows, click the **Drill-down** icon in the **first** column of settings for Free Characteristic "GL Account." The report's appearance will change to show GL Accounts in rows

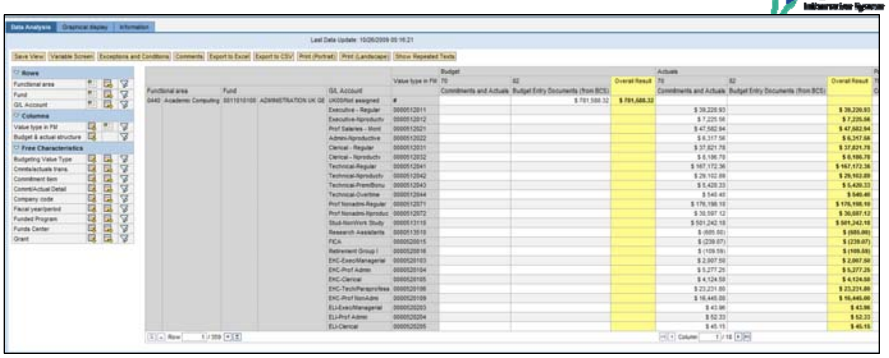
Drill-down *(Continued)*



"GL Account" is moved to the Rows section and the icon changes.

To turn off the drill-down, click on the icon again. The report will revert to its previous format, the item will be moved back to its original position on the panel, and the Drill-down icon will return to its original appearance.

Drill-across



- **Drill-across** adds the data in a column
- Example: To add a column showing "Value Type in FM" on your report, click the Drill-across icon in the **second** column of settings for the Free Characteristic "Value Type in FM."
- The report's appearance will change to show the Value Type in FM data in a column. The item "Value Type in FM" will move up to the Columns section of the panel, and the icon will change to show that the drill-across is turned on for that item.
- To turn off the drill-across, simply click on the icon again.

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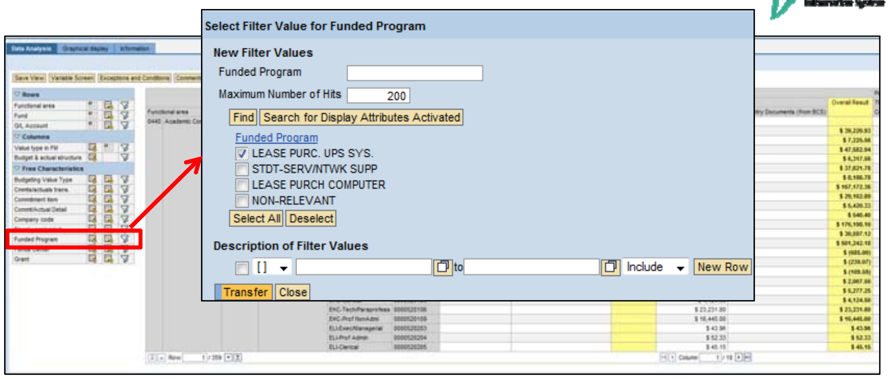
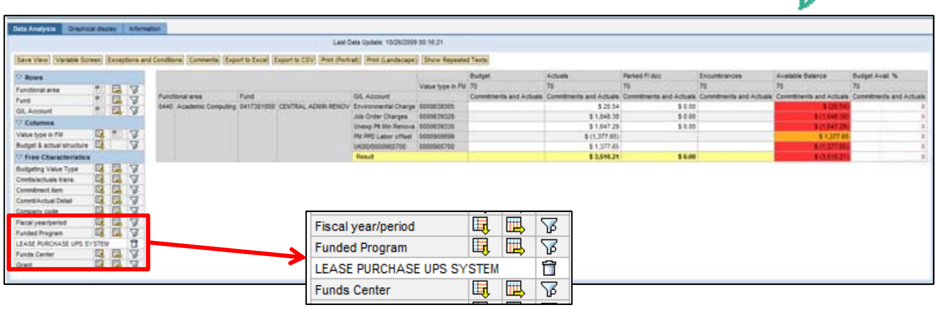
Filters



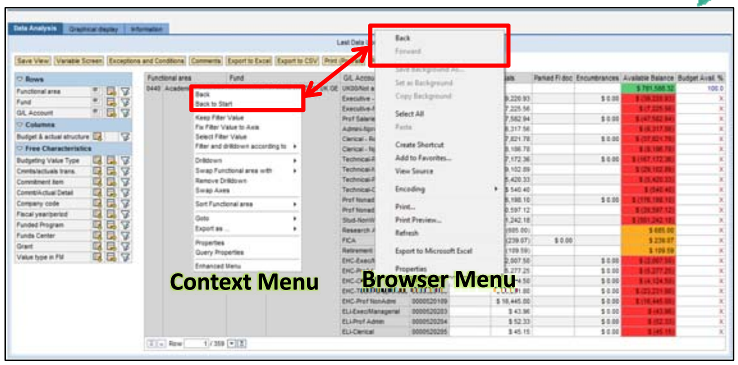
- **Filters** can be added to narrow your query to very specific data.
- Example: To see only a particular Funded Program, click the Filter icon in the **third** column of settings for the Free Characteristic "Funded Program." Select the Funded Program you want to specify and then click the **Transfer** button.

Filters (continued)



- The report will change to show only data for the Funded Program you specified. That Funded Program will appear in the Free Characteristic area, and the icon will change to a trash can to show that the filter is turned on for that item.
- To remove (turn off) the filter, simply click on the trash can icon. The report will revert to its previous format, the item name on the panel will revert to "Funded Program", and the Filter icon will return to its original appearance.

Context Menus



- **Context Menus** offer more options when analyzing data. When you place your cursor on an object that offers a context menu, the object name will suddenly be underlined. Right-click and the context menu will appear. To close the menu, click anywhere on the screen.
- **IMPORTANT**: If you right-click anywhere on the screen or on an item that is **NOT** underlined when you place your cursor on it, you will see the browser menu and **not** the context menu. Use caution and make absolutely sure you are in a true BW Web context menu before you click on an option.

Context Menus *(Continued)*

- Each of the following objects provides a Context Menu that is specific to that particular object:
  - Rows
  - Columns
  - Free Characteristics
  - Characteristic Column headers
  - Characteristic value
  - Key Figure headers
  - Key Figure values
- Each has a **Basic Menu** with an **Enhanced Menu** option, which provides additional features.
- Note that Key Figures are **amounts** and Characteristics **describe** what Key Figures are (i.e., Characteristics are non- amounts).

Context Menu Items *(Reference slide 1)*

Back
Undo last step. [NOTE: DO NOT USE THE BACK BUTTON ON YOUR BROWSER MENU.]

Back to Start
Back to the view when last pressed Execute (on "Variables for Ad Hoc Report" screen).

Select Filter Value
Restrict data of variable(s) to what you have specified.
Example: Filter the Funded Program to select BioMedical Sciences.

Drill Across
Displays the selected characteristic or key figure by placing its values in columns.

Drill Down
Displays the selected characteristic or key figure by placing its values in rows.

Remove Filter
Removes a filter, if one has been selected, and displays all values again.

Remove Drilldown
Removes a drilldown (or across) if one has been selected.

Swap with
Exchanges selected characteristic with another characteristic you choose from a list.
Example: Swap GL Account with Functional Area.

Context Menu Items *(Reference slide 2)*

Swap Axes
Swaps the axes of the view, sending row values to columns and column values to rows.

Sort → Sort Ascending/Sort Descending
Sorts the selected characteristic or key figure, either in ascending or descending order.

Properties
Allows you to view or change the way in which the data is presented for a characteristic or key figure. Examples: Number of decimals; Key and/or short, medium, or long text display; Suppression of results rows.

Query Properties
Allows you to view or change properties that affect the display of the results for the entire query (rather than that of a specific characteristic).

Goto *(on some Enhanced Menus)*
Displays a list of queries available for execution to provide further details or line item information regarding the field selected on your initial query.

Calculate Results as *(on Enhanced Menu for Key Figures)*
Allows you to specify a calculation be performed on a key figure to display the data in a specified manner. Example: Select Calculate Results as → Maximum [to display the maximum value of that group]. Other choices include minimum, average, sum, count, etc.

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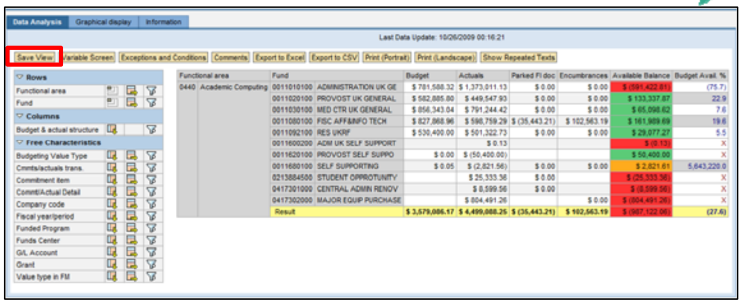
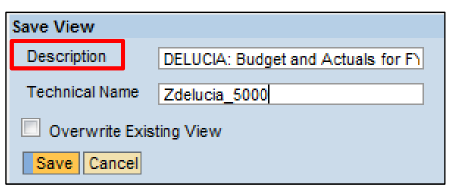
Save View



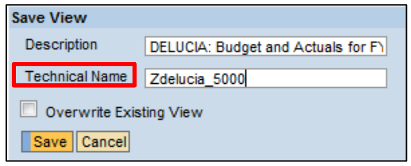
- When your report looks the way you want to see it on a regular basis, you can save the settings (**not** the data) by clicking on **Save View**. Saving a View saves your format and the values on the Variables screen. The next time you run the query, the data will be refreshed. Your view will look the same, but the data will be more current.
- **CAUTION: Views are shared.** Everyone with access to this query can run your saved view…but they cannot change or overwrite it.
  They will be able to make changes and save their own version with new unique Technical Name.

Save View Description

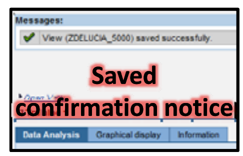


- When you click **Save View**, a small screen appears where you enter a **Description** of the view. You have up to ***60 characters*** to make the description as recognizable as possible.
- We suggest the following guideline for the description:
  - *your UserID* **colon** **space** **description**
  - Example - ***DELUCIA*****: Budget and Actuals by FYR by G/L for FA 0440**
  - We suggest the 'BY' and 'FOR' principle, in your description
    Budget and Actuals by FYR by G/L for FA 0440
    - where BY indicates the drilled-down field, and FOR the filter.

Save View Technical Name



- The Technical Name can contain up to ***30 characters***.
- Naming convention is a '**Z**', followed by your **UserID**, followed by an **underscore** and **your next available view number** starting with 5000. Follow these steps:
  1. Enter a **Z** in the **Technical Name** field
  2. Enter your **AD UserID** (but do not include ad\ or mc\)
  3. At the end of your UserID, enter an **underscore**
  4. Enter **your next available view number** for this query, starting with 5000. Examples: **ZDELUCIA_5000** **ZDELUCIA_5012**
  5. Click the **Save** button to save your view.
- You will receive a confirmation notice.



Save View (Continued)

- The purpose of the naming standard is to help identify the views you have saved. Using the naming convention will quickly identify the person who saved the view and will make it easier for each user to know their next view number.
- Since technical names have to be unique in the SAP BW system, you should keep track of your saved and next view numbers.
- You can find your next view number by clicking on **Open View**.

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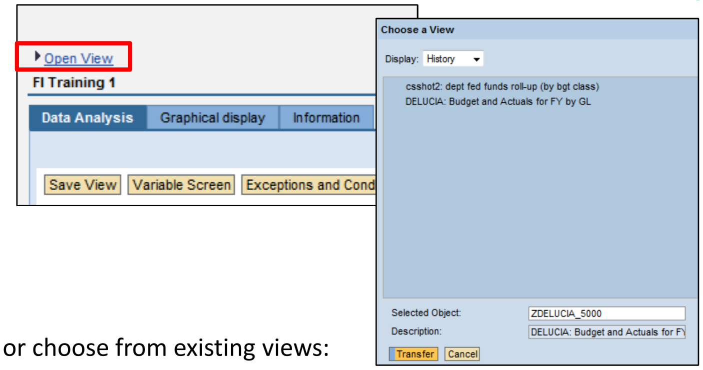
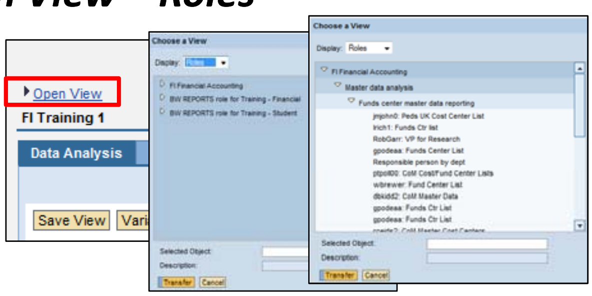
Open View – History



To see or choose from existing views:

1. Click the **Open View** link to open the "Choose a View" window
2. Note that the **Display** field defaults to **History**
3. You can check the technical name of the views listed by either:
   1. Slowly moving your cursor over each one, or
   2. Click once on each view and the technical name will display in the **Selected Object:** field

Open View – Roles



It is helpful to use Roles to see all the views created on each query because:

- You can share your views
- You may find useful views that other users have created
- You can check your own views and determine your next view number

To see **all** views saved by users with the same access (role) as you:

1. Click the **Open View** link to open the "Choose a View" window
2. Open the drop-down menu in the **Display** field and choose **Roles**.
3. Expand each role by clicking on the small black arrows until you see the views created.

Open View

Ctrl-F (Find)

As the list of views gets longer, you may have difficulty finding a particular view. You can use the **Windows** "**Find**" feature (**Ctrl-F**) to quickly locate a view. After the views are displayed:

1. click once in the list of views
2. press and hold the Control key and then press the F key
3. enter a search string to help find the view, e.g., your UserID
4. click "Find Next" until you locate the view you want.

Running a Saved View

Click on the view you want to run. This will populate the Selected Objects box with the Technical Name. Then click the Transfer button

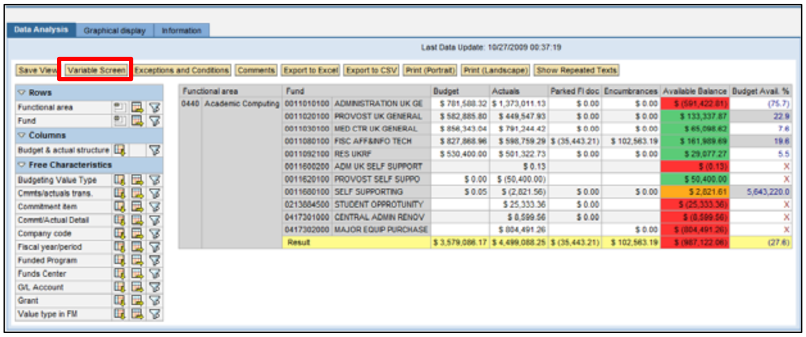
To close the "Choose a View" window without selecting a view, click the Cancel button

Save & Open View

- Once you save a view, it cannot be overwritten by anyone…including you. You can however, open the view, make changes to it, and then save the new view with a new technical name.
- If you no longer need a view, send email to the BW Support Staff at: BI-Requests@email.uky.edu or to a Power User: http://www.uky.edu/IRIS/BW/pdf%20docs/PowerUserList.pdf
  Specify the view you want deleted and be sure to include the **Technical Name** and the **Description** of the view.

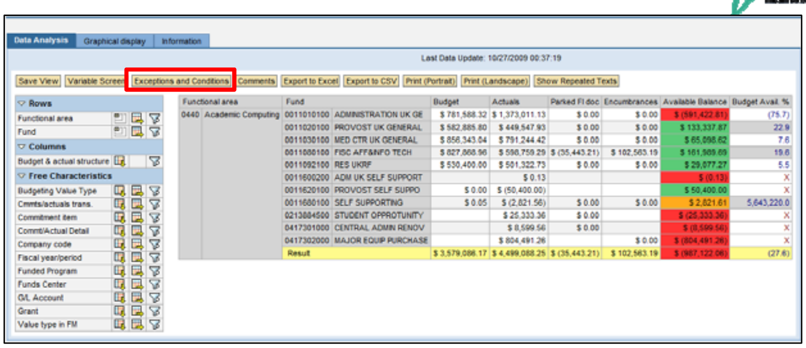
  Deleting views that are no longer needed will keep unwanted views from cluttering the system. You can reuse the technical name after a view is deleted.
- After you save, you can click **Open View** again and take a look at the Roles. You will be able to see your newly created view in both **Roles** and **History**.

Variable Screen



- Once you review your report, you can request different results by clicking on the **Variable Screen** button. This will take you back to the "Variables for Ad-hoc Report" screen, where you can change the variables (values).
- **IMPORTANT**: If you are entering new variables, be sure to **REMOVE** any variable information that does not apply.
- Click the **Execute** button on the Variables screen to display the revised report.

Exceptions & Conditions



- **Exceptions** allow you to color-code cells that meet specified criteria.
- **Conditions** allow you to change a report depending on specified criteria.
- Some Exceptions and Conditions may be supplied with the query. If not, you can create your own.
- If you save a view, the Exceptions and Conditions are saved with it.
- Click on the Exceptions and Conditions button to open.

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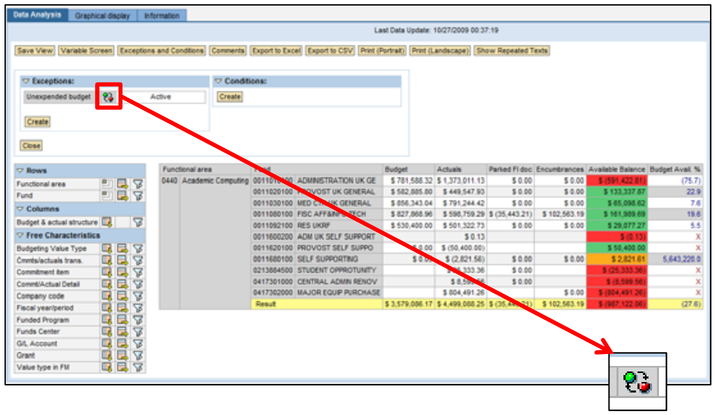
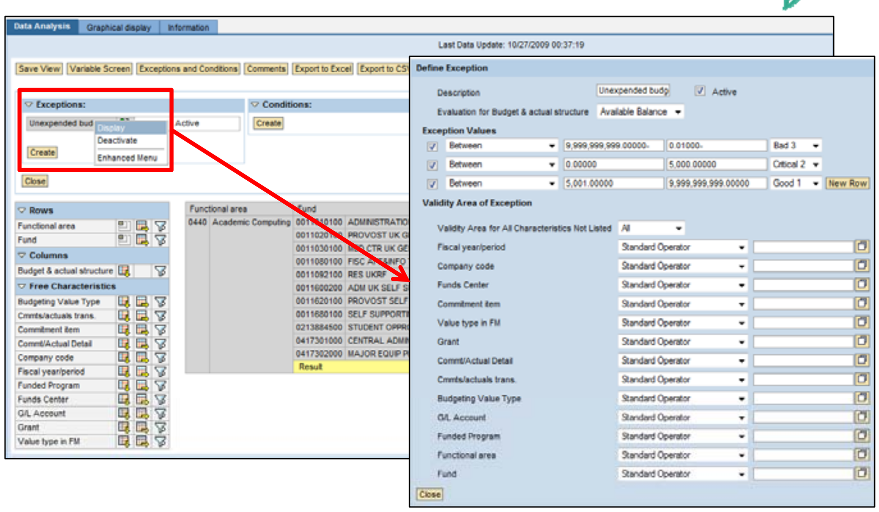
Exceptions



- You **Activate/Deactivate** Exceptions by clicking on the red and green icon.
- The icon is a toggle switch that turns the Exception on and off.
- Some Exceptions and Conditions may be supplied with the query. You can deactivate or change these but you can not delete them.
- You can also create new ones.

Seeing Exception Criteria

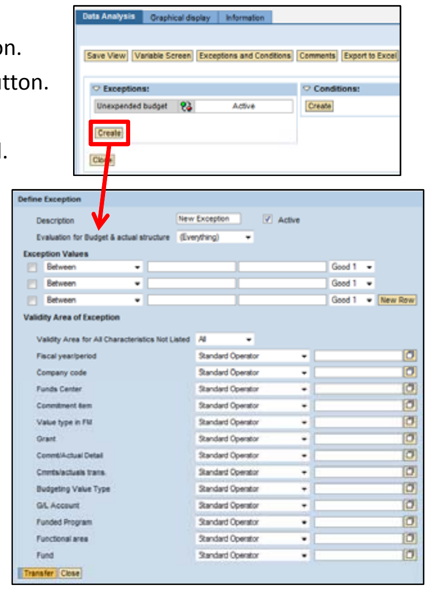


To see the criteria for an existing Exception, right-click the Exception name and select **Display** from the fly-out menu.

Creating a New Exception

To create a new Exception:

1. Click on the **Exceptions and Conditions** button.
2. In the Exceptions area, click on the **Create** button.
3. Enter a brief but recognizable **Description**.
4. Select the field to be watched or color-coded.
5. Select how the data is to be compared:
   Greater Than, Less Than, Between, etc.
6. Fill in the next two fields with the number(s) that fit the comparison:
   Greater Than 100, Between 50 100, etc.
7. Select the level - levels indicate, by color, how good or bad the value is.
   1. Good 1, 2, and 3
   2. Critical 1, 2, and 3
   3. Bad 1, 2, and 3
8. Click the **Transfer** button

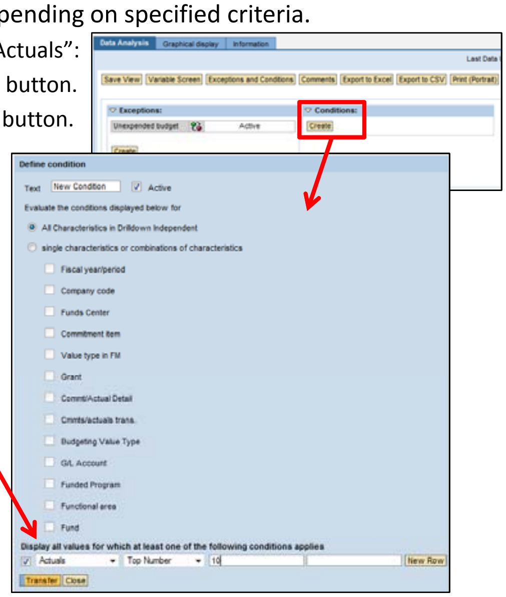


Creating a New Condition

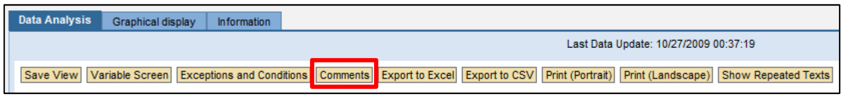
Conditions let you change a report depending on specified criteria.

Example: You want to display the top 10 "Actuals":

1. Click on the **Exceptions and Conditions** button.
2. In the Conditions area, click the **Create** button.
3. Enter the Text (name or description):
   Example – **Top 10 Actuals**
4. At the bottom,
   click in the **Display all values** checkbox
5. In the first drop-down, select "**Actuals**"
6. In the next drop-down, select "**Top Number**" (you can also see the other options)
7. In the first box, enter in "**10**"
8. Click the **Transfer** button

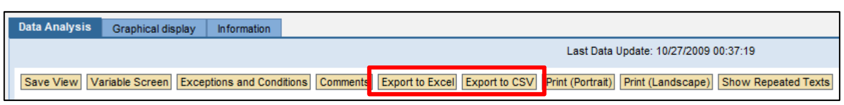


Comments



- Comments are documentation you can create, specific to the initial query. They are useful for relaying information about the query.
- Use caution, however, because Comments can be seen and changed by everyone who has the role where the query is located.
- If you save a view and add Comments to your view, you have also added those Comments to the query in the role.

Export to Excel & CSV



You can **Export** (send) your report to an Excel Spreadsheet or a CSV (comma-delimited) file by **clicking** on the appropriate button.

This is handy if you want to use the data:

- in Access, Crystal, or Brio, or
- if you want to print the information, or
- you want to use Excel to create a graph

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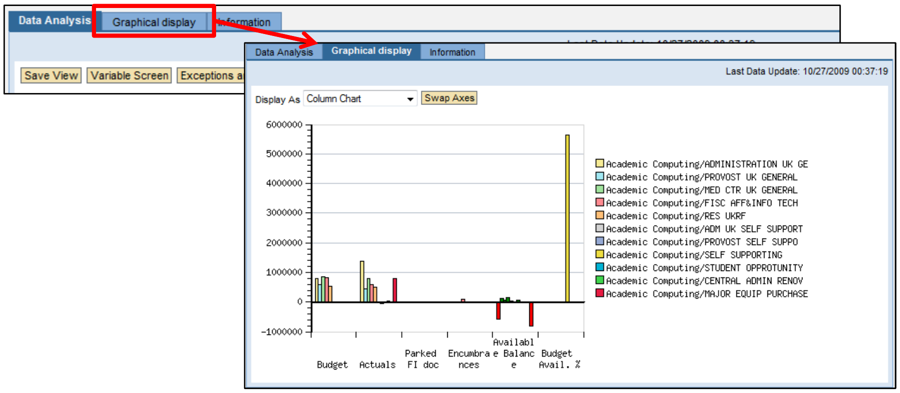
Graphical Display Tab

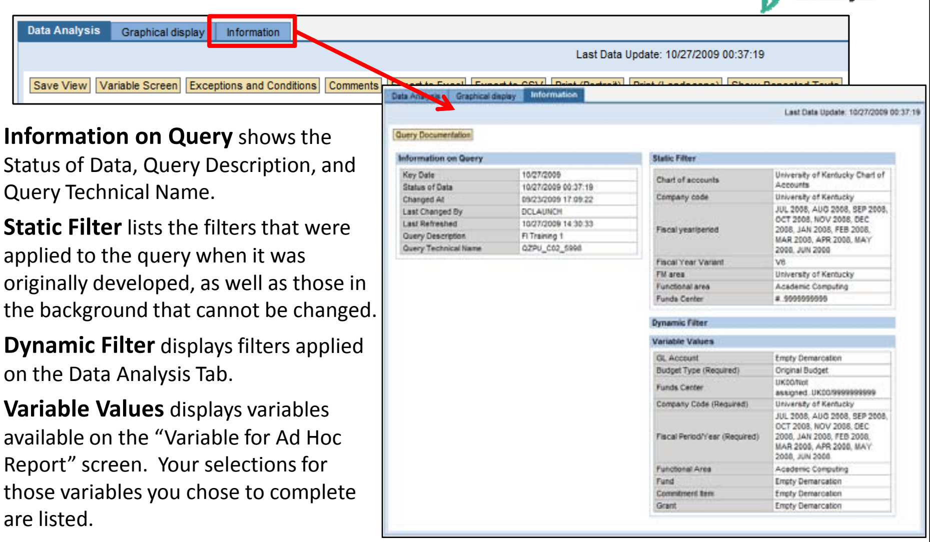


The **Graphical Display** tab shows you what the current report (on the **Data Analysis** tab) looks like as a graph.

You can choose the type of chart or graph via the **Display as** drop-down menu.

You can also Swap Axes by clicking on the button.

Information Tab



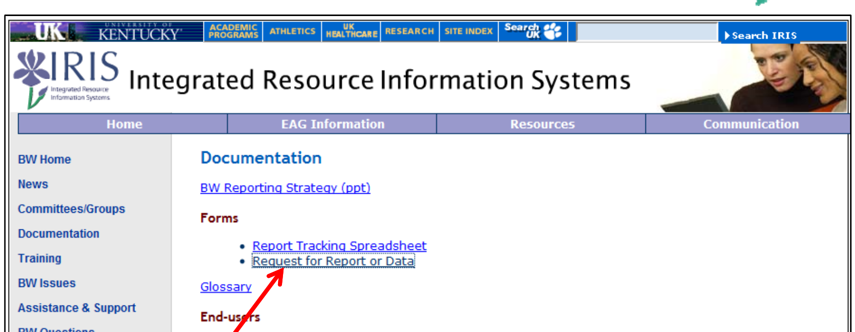
- **Information on Query** shows the Status of Data, Query Description, and Query Technical Name.
- **Static Filter** lists the filters that were applied to the query when it was originally developed, as well as those in the background that cannot be changed.
- **Dynamic Filter** displays filters applied on the Data Analysis Tab.
- **Variable Values** displays variables available on the "Variable for Ad Hoc Report" screen. Your selections for those variables you chose to complete are listed.

How to Log Off BW Web Reports

1. Close the BEx report window by clicking the red "**X**" in upper right corner of the window or tab
2. Close the Report & Query List
3. Click the **Log off** link
4. Close the ***my*****UK** Portal

Note: To clear the values from the variables on the **Variables for Ad Hoc** window, you need to close **all** of your browser windows. Otherwise, the variables you used for prior queries will populate the values for the same variables.

Need Another Report?



Use the **BW Request for report or Data** document

- Where to find it?
  http://www.uky.edu/IRIS/BW/bw_documentation.htm
- How to fill it out?
  Tab through the fields, completing each one.
- Email the request to: **BI-Requests@email.uky.edu**

Need Assistance?

First, review the IRIS BW web page:
http://www.uky.edu/IRIS/BW/bw_questions.html

If you still need assistance, please send an email to
BI-Requests@email.uky.edu

Training Sandbox

- You will still have access to the production training folder used in class to learn and practice in the future.
- What you do in the training folder will not affect the actual data in Production.

BEx Terminology

Characteristics – Characteristics describe what a key figure represents and are often displayed in rows. Characteristics are not dollar amounts or units which can be totaled.

Context Menus – Menus available when working with BW reports (on the Data Analysis screen) that offer additional options for analyzing or presenting the data. Context menus are available for Rows, Columns, Free Characteristics, Characteristic Column Headers, Characteristic Values, Key Figure Headers, and Key Figure Values.

Drill-Across – A feature that, when selected, will result in the values of that characteristic appearing in columns on your query results.

Drill-Down – A feature that, when selected, will result in the values of that characteristic appearing in rows on your query results.

Field – An area in an electronic record that is allocated for a certain data element (piece of information). An example in BW is Fiscal Year Period, the field allocated for Fiscal Year information.

Filter – Allows you to limit the data by selecting one or more specific values for a particular field.

BEx Terminology

Free Characteristics – Fields that are not displayed on the initial report view but are available and may be selected by the user to be included in the new or modified report view.

Goto – A feature on some context menus that displays a list of queries available for execution which can provide further details or line item information regarding the field selected on your initial query.

Hierarchy – A grouping of data that can be summarized at different levels.

Key Figures – Dollar amounts or units which can be summed, counted, or have calculations applied to them.

Personalization – Allows you to select a value for a variable and lock this value for this query as well as all other queries you run.

Properties – Attributes or qualities assigned to a particular characteristic that determine how the value is displayed.

Query – A request for information.

BEx Terminology

Query Properties – Attributes assigned to the entire query report view that determine how certain values are displayed. Example: Suppression of zeroes.

Structure – A category of data used in BW reporting that groups data elements together because they are closely related or dependent on each other. The end-user can determine which fields in the structure to display in their query report view. To see all the available fields, click on the filter/funnel next to the structure's name on the left panel.

Variables – Allow you to specify the criteria to be used in your query report view. Example: After selecting a certain value for the variable, Funds Center, you could narrow your report view further by selecting a value for the variable, GL Account. This will return information for the specified GL account in the specified Funds Center only. When you enter values for multiple variables, you narrow your criteria to the information you really need. Your report view will run more quickly if you complete more variables because the results are more focused and narrow.

View – The result of running a query. Views can be modified to meet individual user needs to see the data in the particular format desired.

Assessment Environment

Before you begin the Assessment, perform each of the following steps to make sure you log completely out of BEX and the portal, and then close all other applications. This will ensure that any variables you entered during the course exercises will not populate on your Assessment's query.

1. Close the BEx report window by clicking on the red "X" in the upper-right corner of the window.
2. Close the Report & Query List.
3. Close the ***my*UK** portal.
4. Click the Log Off link.
5. Click "Yes" to log off.
6. Close any other applications that are minimized at the bottom of your screen (including email).

You are now ready to begin the Assessment.
Instructions are provided on the same website as this course.