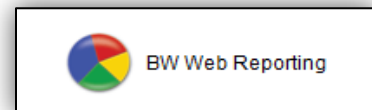

BW Web Reporting BEX_300 Practice Guide

This Practice Guide is a copy of the slides presented in the course and as such will help you follow and practice what is shown.

This is not a requirement for completing this course.

You will be completing these exercises in the BW Training Area in Production.




If you do not have the BW Web Reporting link, you do not have the access required to practice this course.


Please submit the BW Web Reporting Access Request form for appropriate access.

If you have any questions, please send an e-mail to IRISTraining@email.uky.edu.

BW Web Reporting Practice Guide - BEX_300




BW Web Reporting **(BEX_300)**




Click anywhere on the slide to proceed through this course

BW Web Reporting - BEX_300

Course Setup – A Must Have



Since the BEX_300 class is taught in the production area of BW, the BEX classes are now only available to people who have this class as an approved part of their training plan...


Before you proceed any further... 

1. 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.
2. Before proceeding make sure that you have completed the request for BW Web Reporting access **and you have received a confirmation that you can begin.**
 - Refer to the instructions listed on the *myTraining* page for this course.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

Prerequisites



- Prerequisites
 - UK_100 IRIS Awareness & Navigation

And 1 of the following overview courses:

- FI_200 Finance Overview
- HR_200 Human Resources Overview
- SLCM_200 Student Lifecycle Management Overview

If you have not completed both of these prerequisite courses, please do so prior to taking this course.

BW Web Reporting - BEX_300

Course Assessment Activities



There are two assessment components to the BW Web Reporting course.

Each part must be completed successfully in order to receive credit for this course.



- Part 1 – Check for Understanding
- Part 2 – Hands-on Course Assessment

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

Check for Understanding



- **Part 1 – Check for Understanding:** A series of questions which will be presented at the end of each unit.
- You must answer each question before proceeding.
- To complete:
 1. Click on the radio button next to your answer  is the easiest
 2. Click on the **Submit** button 
 3. Click any where on the slide to continue
 4. Repeat Steps 1 through 3 for each question
 5. After answering all of the questions you will continue to the next unit.

BW Web Reporting - BEX_300

Course Assessment



- **Part 2 – BW Web Reporting Assessment:** This is a hands-on assessment. Further information on this assessment will be given to you at the very end of this course.



BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

BW Web Reporting Practice Guide



- As noted at various points in this course, the BW Web Reporting Practice Guide is available. It is recommended that you practice the various concepts that are discussed in this course.
- The guide is optional and not a requirement for completing this course.
- To access the guide:
 1. Click on the **Practice Guide** button below.
 2. The **BW Web Reporting Practice Guide** will open in a separate browser window.
 3. Print the guide.

BW Web Reporting - BEX_300

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.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

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 how to export your report to Microsoft Excel

There will be an assessment at the end of course that covers the concepts and actions covered in this course. 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, it is recommended that you use the BW Web Reporting Practice Guide to follow and practice what is shown.

BW Web Reporting - BEX_300



Introduction

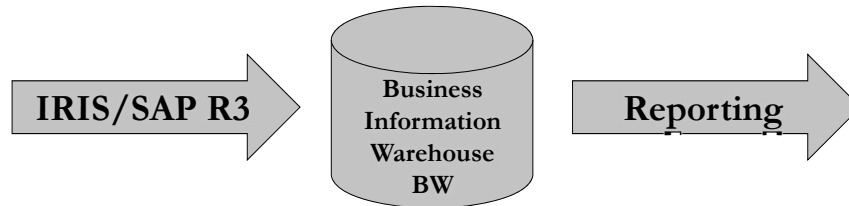
Check for Understanding

BW Web Reporting Practice Guide - BEX_300

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 *myUK* Portal to access BW Web Reporting (BW-Web) to produce BW Reports.

BW Web Reporting - BEX_300

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

BW Web Reporting - BEX_300

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.
- **Do NOT use browser navigation buttons while in BW Web Reporting.**

- **Active Directory Account** – You need an Active Directory Services Account (with domain of either ad or mc) to log onto the **myUK** Portal.
- Please contact the IT Customer Service Center at 218-4357 for information on obtaining an AD account.

BW Web Reporting - BEX_300

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.

Note: At the time this course was developed, IE 9 was not supported by SAP and is not compatible with all functions available in the *myUK* portal.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300



Overview Check for Understanding

How to Access the myUK Portal



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

BW Web Reporting Practice Guide - BEX_300

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
- To start 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.

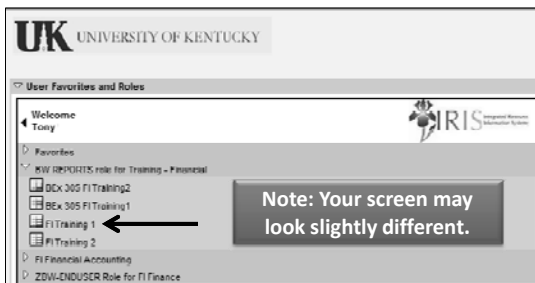
BW Web Reporting - BEX_300

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 BW Web Reporting
- **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
(If you do not see FI Training 1 see the last bullet of the previous slide)



BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

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 want 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

BW Web Reporting - BEX_300

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

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

Required Variables



Variables for Ad Hoc Report

Fiscal Period/Year (Required) *			Include	Insert Row
Company Code (Required) *	UK00	University of Kentucky	Include	Insert Row
Budget Type (Required) *				
Funds Center		UK00/Not assigned To 999999999		
Functional Area			Include	Insert Row
Fund			Include	Insert Row
OL Account			Include	Insert Row
Commitment Item			Include	Insert Row
Grant			Include	Insert Row

Execute | Check

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**

BW Web Reporting - BEX_300

Multiple Selection



The Multiple Selection feature provides additional choices for selecting your criteria

Variables for Ad Hoc Report

Fiscal Period/Year (Required) (*)			Include	Insert Row
Company Code (Required) (*)	UK00	University of Kentucky	Include	Insert Row
Budget Type (Required) (*)				
Funds Center		UK00/Not assigned To 999999999		
Functional Area			Include	Insert Row
Fund			Include	Insert Row
OL Account			Include	Insert Row
Commitment Item			Include	Insert Row
Grant			Include	Insert Row

Execute | Check

You can:

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

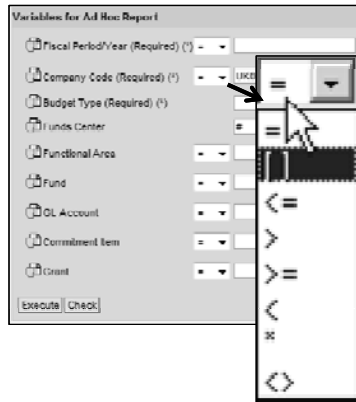
BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300



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

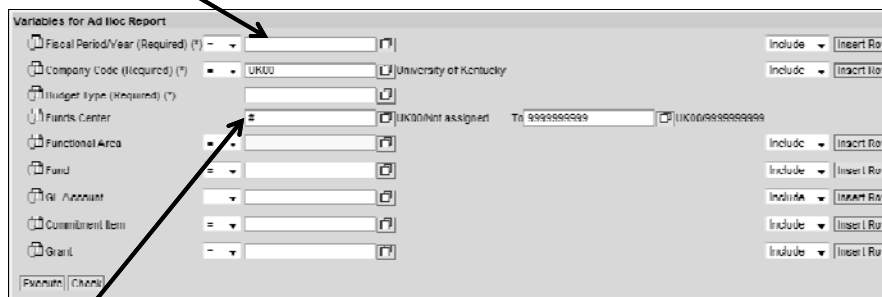
Note: The Wildcard Operator does not work with variables that refer to a time period, like Fiscal Year/Period.

BW Web Reporting - BEX_300



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.

Note that a pound sign (#) in any field indicates that you want to include the selection even if the field was left blank and has no entry.

BW Web Reporting - BEX_300

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.

BW Web Reporting - BEX_300

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.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

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

BW Web Reporting - BEX_300


Personalization (Continued)





Before

After

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

The icon has changed  **Company Code (Required) (*)** 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  **Company Code (Required) (*)** icon and select **Delete Personalization**

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

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.

BW Web Reporting - BEX_300

Verify Variables



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

The screenshot shows the 'Variables for Ad Hoc Report' interface. It includes the following fields and options:

- Fiscal Period/Year (Required) (*)**: A list of fiscal periods from 001/2000 to 012/2008, each with a corresponding month (e.g., JUL 2000, AUG 2000, etc.). Each row has an 'Include' dropdown menu.
- Company Code (Required) (*)**: Set to 'UK00' with 'University of Kentucky' selected.
- Budget Type (Required) (*)**: Set to 'ORIG' with 'Original Budget' selected.
- Funds Center**: Set to 'UK00/Not assigned' with 'UK000999999999' selected.
- Functional Area**: Set to '0440' with 'Academic Computing' selected.
- Fund**: Empty field.
- GL Account**: Empty field.
- Commitment Item**: Empty field.
- Grant**: Empty field.

At the bottom of the form are 'Execute' and 'Check' buttons.

BW Web Reporting - BEX_300



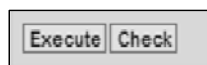
Unit 1 Check for Understanding

Check and Execute



After you specify your variables, click on the **Check** button and the system will check *the format* of 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.

BW Web Reporting Practice Guide - BEX_300

The BW Report



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Open View
H Training 1

Data Analysis | Graphical display | Information

Last Data Update: 10/23/2009 01:25:10

Save View | Variable Screen | Exceptions and Conditions | Comments | Export to Excel | Export to CSV | Print (Portrait) | Print (Landscape) | Show Repeated Texts

Shows	Functional area	Fund	Budget	Actuals	Period Fldcs	Encumbrances	Available Balance	Budget Avail. %
	0440 Academic Computing	0011020100 ADMINISTRATION UK GENL	\$ 781,288.22	\$ 1,272,071.12	\$ 0.00	\$ 0.00	\$ 1,059,288.91	(175.7)
		0011020100 PROVOST UK GENERAL	\$ 582,882.00	\$ 448,547.82	\$ 0.00	\$ 0.00	\$ 122,277.67	22.8
		0011020100 MED CTR UK GENERAL	\$ 556,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 105,098.02	7.8
		0011000100 FDC AIT&INFO TECH	\$ 627,868.90	\$ 586,728.29	\$ (35,443.21)	\$ 102,563.19	\$ 101,569.09	19.0
		0011002100 RES UNDF	\$ 220,400.00	\$ 201,222.72	\$ 0.00	\$ 0.00	\$ 23,077.27	5.5
		0011000200 ADM UK SELF SUPPORT		\$ 0.15			\$ 0.15	X
		0011000100 PROVOST SELF SUPP		\$ 0.00			\$ 10,400.56	X
		0011000100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.51	5,043,220.0
		0513004500 STUDENT OPPORTUNITY		\$ 25,333.36	\$ 0.00		\$ (25,333.36)	X
		0417301000 CENTRAL ADMIN FUND		\$ 8,550.56	\$ 0.00		\$ (8,550.56)	X
		0417302000 MAJOR EQUIP PURCHASE		\$ 104,471.06		\$ 0.00	\$ (104,471.06)	X
		Total	\$ 3,1370,880.17	\$ 4,490,080.20	\$ (35,443.21)	\$ 102,563.19	\$ 1,047,102.00	(27.6)

Data Analysis Tab – Your data appears on this tab.

Graphical Display Tab

Information Tab

BW Web Reporting - BEX_300

Last Data Update



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Open View
H Training 1

Data Analysis | Graphical display | Information

Last Data Update: 10/23/2009 01:25:10

Save View | Variable Screen | Exceptions and Conditions | Comments | Export to Excel | Export to CSV | Print (Portrait) | Print (Landscape) | Show Repeated Texts

Shows	Functional area	Fund	Budget	Actuals	Period Fldcs	Encumbrances	Available Balance	Budget Avail. %
	0440 Academic Computing	0011020100 ADMINISTRATION UK GENL	\$ 781,288.22	\$ 1,272,071.12	\$ 0.00	\$ 0.00	\$ 1,059,288.91	(175.7)
		0011020100 PROVOST UK GENERAL	\$ 582,882.00	\$ 448,547.82	\$ 0.00	\$ 0.00	\$ 122,277.67	22.8
		0011020100 MED CTR UK GENERAL	\$ 556,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 105,098.02	7.8
		0011000100 FDC AIT&INFO TECH	\$ 627,868.90	\$ 586,728.29	\$ (35,443.21)	\$ 102,563.19	\$ 101,569.09	19.0
		0011002100 RES UNDF	\$ 220,400.00	\$ 201,222.72	\$ 0.00	\$ 0.00	\$ 23,077.27	5.5
		0011000200 ADM UK SELF SUPPORT		\$ 0.15			\$ 0.15	X
		0011000100 PROVOST SELF SUPP		\$ 0.00			\$ 10,400.56	X
		0011000100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.51	5,043,220.0
		0513004500 STUDENT OPPORTUNITY		\$ 25,333.36	\$ 0.00		\$ (25,333.36)	X
		0417301000 CENTRAL ADMIN FUND		\$ 8,550.56	\$ 0.00		\$ (8,550.56)	X
		0417302000 MAJOR EQUIP PURCHASE		\$ 104,471.06		\$ 0.00	\$ (104,471.06)	X
		Total	\$ 3,1370,880.17	\$ 4,490,080.20	\$ (35,443.21)	\$ 102,563.19	\$ 1,047,102.00	(27.6)

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

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

BW Web Reporting - BEX_300

Drill-across



Functional Area	FUND	UL ACCOUNT	Value Type in FM	Budget	Actuals	Overall Total
...	Value Type in FM

- **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.

BW Web Reporting - BEX_300

Filters



Select Filter Value for Funded Program

New Filter Values

Funded Program:

Maximum Number of Hits:

Find:

LEASE PURC. UPS SYS
 STDT-SERV/INWK SUM
 LEASE-HUM/CMPT/INR
 NON-RELEVANT

Select All | Deselect

Description of Filter Values:

Transfer | Close

- **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.

BW Web Reporting - BEX_300

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).

BW Web Reporting - BEX_300

Context Menu Items (Reference slide 1 of 2)



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.

BW Web Reporting - BEX_300

Context Menu Items *(Reference slide 2 of 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 to 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.

BW Web Reporting - BEX_300



Unit 2 Check for Understanding

Save View



Functional area	Fund	Budget	Actuals	Encumbrances	Available Balance	Budget Avail %
0440 Academic Computing	001801000 ADMINISTRATIVE BIK (C)	\$ 701,588.72	\$ 1,373,818.13	\$ 0.00	\$ 0.00	194.40%
	001802000 REVENUES ON CONTRACT	\$ 300,000.00	\$ 448,747.81	\$ 0.00	\$ 0.00	149.58%
	001803000 REVENUES ON CONTRACT	\$ 500,000.00	\$ 925,070.32	\$ 0.00	\$ 0.00	185.01%
	001804000 TOC AT&M'D TLOI	\$ 027,000.00	\$ 290,739.29	\$ 05,643.21	\$ 102,500.19	101.80%
	001805000 ALJ OPRN	\$ 100,000.00	\$ 261,228.72	\$ 0.00	\$ 0.00	261.23%
	001806000 FOR UNSELF SUPPORT	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00%
	001807000 BROWNST SELF SUBRD	\$ 0.00	\$ 50,450.00	\$ 0.00	\$ 0.00	50.45%
	001808000 SELF SUPPORTING	\$ 0.00	\$ 2,821.98	\$ 0.00	\$ 2,821.61	680.2800%
	021801000 STUDENT SUPPORTIVITY	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00%
	041701000 CENTRAL ADMIN REVENUE	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00%
	041702000 MAJOR EQUIP PURCHASE	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00%
	Result	\$ 3,579,688.47	\$ 4,495,888.25	\$ 05,643.21	\$ 102,500.19	125.61%

- 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 your saved view. They will be able to make changes and save their own version with new unique Technical Name.

BW Web Reporting - BEX_300

Save View Description



Save View

Description: DFI IICIA Budget and Actuals for FY

Technical Name: Zdelucia_5000

Overwrite Existing View

Save Cancel

- 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.

BW Web Reporting - BEX_300

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.



BW Web Reporting - BEX_300

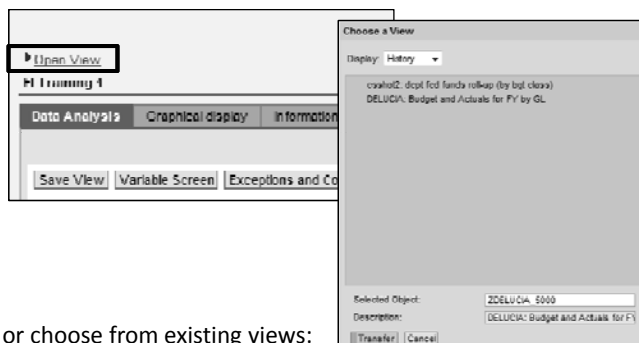
Save View (Continued)



- 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**.

BW Web Reporting - BEX_300

Open View – History

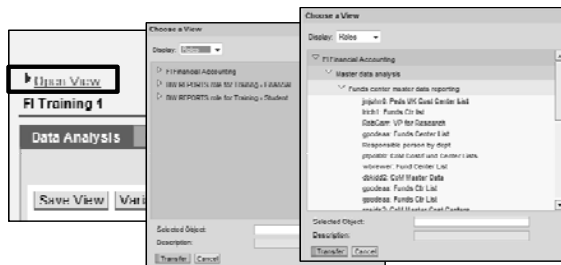


To see or choose from existing views:

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

BW Web Reporting - BEX_300

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.

BW Web Reporting - BEX_300

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

BW Web Reporting - BEX_300

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**.

BW Web Reporting - BEX_300

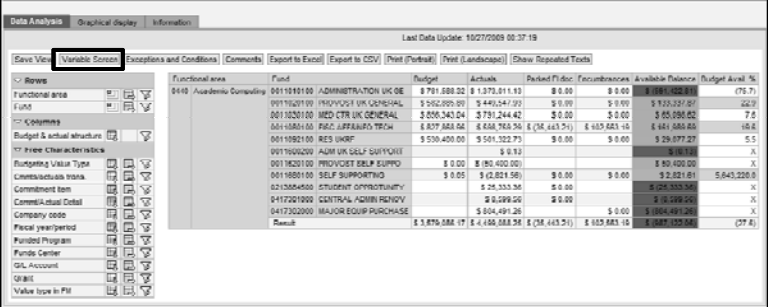



Unit 3

Check for Understanding



Variable Screen



Functional area	Fund	Budget	Actuals	Picked P/Doc	Encumbrances	Available Balance	Budget Avail %
0410 Academic Consulting	0011089100 ADMINISTRATION UK OE	\$ 781,588.02	\$ 1,373,811.93	\$ 0.00	\$ 0.00	\$ 1,681,322.81	(75.7)
	0011162010 PHYSICAL UK GENERAL	\$ 562,992.00	\$ 449,347.02	\$ 0.00	\$ 0.00	\$ 132,227.01	23.7
	0011020100 MED CTR UK GENERAL	\$ 285,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 555,586.62	7.6
	0011085100 PHYS JOURNAL/TECH	\$ 237,883.56	\$ 658,763.56	\$ (26,443.51)	\$ 115,883.16	\$ 441,586.65	16.8
	0011082100 RES UNDF	\$ 530,400.00	\$ 581,322.73	\$ 0.00	\$ 0.00	\$ 26,077.27	5.5
Freeze Characteristics	0011060200 ADM UK SELF SUPPLY	\$ 0.12				\$ 189.58	X
Budgeting Value Type	0011020100 PHYSICAL SELF SUPPLY	\$ 0.00	\$ 185,402.00			\$ 50,402.00	X
Line Item/Account	0011080100 SELF SUPPORTING	\$ 0.00	\$ (2,011.56)	\$ 0.00	\$ 0.00	\$ 2,021.01	\$ 643,220.0
Commitment Item	0213084600 STUDENT OPPORTUNITY		\$ 28,333.36	\$ 0.00		\$ (26,333.36)	X
Commitment Detail	0417201000 CENTRAL ADMIN PDNOV		\$ 2,099.00	\$ 0.00		\$ (1,189.25)	X
Company Code	0417202000 MAJOR EQUIP PURCHASE		\$ (104,491.26)		\$ 0.00	\$ 888,491.26	X
Physical year/period	Total	\$ 1,870,588.12	\$ 4,405,882.58	\$ (26,443.51)	\$ 115,883.16	\$ 1,681,322.81	(27.6)

- 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.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

Exceptions & Conditions



Functional area	Fund	Budget	Actuals	Period P/B	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	001100000 ADMN/EDUCATION UK/CE	\$ 781,553.33	\$ 1,373,014.13	\$ 0.00	\$ 0.00	\$ 1,654,567.16	(74.7)
	001102010 PROVIDENT UK GENERAL	\$ 662,885.00	\$ 1,148,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
	001102010 MED CTR UK GENERAL	\$ 0.00	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 05,996.02	7.6
	001102010 PRG AFFAIRS/PTCH	\$ 827,868.96	\$ 558,758.29	\$ (26,443.21)	\$ 107,683.15	\$ 181,888.88	18.8
	001102010 RES INFY	\$ 526,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 20,077.27	3.8
	001102020 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	X
	001102010 PROVIDENT SELF SUPPO	\$ 0.00	\$ (50,400.00)	\$ 0.00	\$ 0.00	\$ 50,400.00	X
	001100000 SELF SUPPORTING	\$ 0.00	\$ (2,627.50)	\$ 0.00	\$ 0.00	\$ 2,627.51	5.042200
	021305000 STUDENT OPPORTUNITY	\$ 0.00	\$ 28,333.30	\$ 0.00	\$ 0.00	\$ 28,333.30	X
	041730100 CENTRAL ADMIN RENOV	\$ 0.00	\$ 1,599.56	\$ 0.00	\$ 0.00	\$ 1,599.56	X
	041730300 MAJOR EQUIP PURCHASE	\$ 0.00	\$ 504,491.26	\$ 0.00	\$ 0.00	\$ 1,004,491.26	X
	Result	\$ 3,679,088.17	\$ 4,190,088.25	\$ (26,443.21)	\$ 107,683.15	\$ 1,087,337.58	(27.8)

- **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.

BW Web Reporting - BEX_300

Exceptions



Functional area	Fund	Budget	Actuals	Period P/B	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	001100000 ADMN/EDUCATION UK/CE	\$ 781,553.33	\$ 1,373,014.13	\$ 0.00	\$ 0.00	\$ 1,654,567.16	(74.7)
	001102010 PROVIDENT UK GENERAL	\$ 662,885.00	\$ 1,148,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
	001102010 MED CTR UK GENERAL	\$ 0.00	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 05,996.02	7.6
	001102010 PRG AFFAIRS/PTCH	\$ 827,868.96	\$ 558,758.29	\$ (26,443.21)	\$ 107,683.15	\$ 181,888.88	18.8
	001102010 RES INFY	\$ 526,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 20,077.27	3.8
	001102020 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	X
	001102010 PROVIDENT SELF SUPPO	\$ 0.00	\$ (50,400.00)	\$ 0.00	\$ 0.00	\$ 50,400.00	X
	001100000 SELF SUPPORTING	\$ 0.00	\$ (2,627.50)	\$ 0.00	\$ 0.00	\$ 2,627.51	5.042200
	021305000 STUDENT OPPORTUNITY	\$ 0.00	\$ 28,333.30	\$ 0.00	\$ 0.00	\$ 28,333.30	X
	041730100 CENTRAL ADMIN RENOV	\$ 0.00	\$ 1,599.56	\$ 0.00	\$ 0.00	\$ 1,599.56	X
	041730300 MAJOR EQUIP PURCHASE	\$ 0.00	\$ 504,491.26	\$ 0.00	\$ 0.00	\$ 1,004,491.26	X
	Result	\$ 3,679,088.17	\$ 4,190,088.25	\$ (26,443.21)	\$ 107,683.15	\$ 1,087,337.58	(27.8)

- 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.

BW Web Reporting - BEX_300

Seeing Exception Criteria



The screenshot shows the 'Data Analysis' interface with the 'Exceptions and Conditions' menu open. The 'Exceptions' section contains a table with one entry: 'Unexpended budget' (Active). A red box highlights the 'Create' button next to this entry. An arrow points from this button to the 'Define Exception' dialog box. The dialog box is titled 'Define Exception' and has 'Unexpended budget' in the 'Description' field and 'Active' checked. It contains sections for 'Exception Values' (with three rows of values and operators), 'Validity Area of Exception' (with a dropdown set to 'All'), and a list of 'Validity Area for All Characteristics Not Listed' with various fields and 'Standard Operator' dropdowns.

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

BW Web Reporting - BEX_300

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

This screenshot shows the 'Data Analysis' interface with the 'Exceptions and Conditions' menu open. The 'Exceptions' section is empty. A red box highlights the 'Create' button.

This screenshot shows the 'Define Exception' dialog box. The 'Description' field contains 'New Exception'. The 'Exception Values' section has three rows, each with a dropdown set to 'Between' and a 'Good 1' dropdown. The 'Validity Area of Exception' dropdown is set to 'All'. The 'Validity Area for All Characteristics Not Listed' section has various fields with 'Standard Operator' dropdowns. A red box highlights the 'Create' button.

BW Web Reporting - BEX_300

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

BW Web Reporting - BEX_300

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.

BW Web Reporting - BEX_300

BW Web Reporting Practice Guide - BEX_300

Export to Excel & CSV



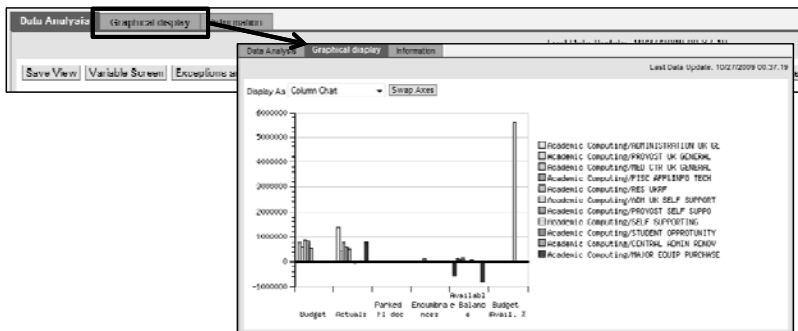
You can Export (send) your report to an Excel Spreadsheet or a CSV (comma-delimited) file by clicking on the appropriate button.

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

BW Web Reporting - BEX_300

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.

Remember that you can also export the data into Excel and use the power of Excel Graphs.

BW Web Reporting - BEX_300

Information Tab



Information on Query

Run Date	10/27/2009
Status of Data	02/27/2009 00:37:19
Updated At	09/02/2009 17:09:22
Last Changed By	DCL/JNDH
Last Parameter	10/27/2009 11:30:33
Query Description	H Inquiry 1
Query Technical Name	027N_C42_590

Static Filter

Chart of accounts	University of Kentucky Chart of Accounts
Company code	University of Kentucky
Fiscal year/period	Jan 2008, Jul 2008, Sep 2008, Oct 2008, Nov 2008, Dec 2008, Jan 2009, Feb 2009, Mar 2009, Apr 2009, May 2009, Jun 2009
Fiscal Year Variant	10
Functional area	University of Kentucky
Functional area	Academic Computing
Funds center	0000000000

Dynamic Filter

Variable Values

OL Account	Empty Demonstration
Budget Type (Required)	Original Budget
Funds Center	UK00000000000000000000
Company Code (Language)	University of Kentucky
Fiscal Period/Year (Required)	Jul 2008, Aug 2008, Sep 2008, Oct 2008, Nov 2008, Dec 2008, Jan 2009, Feb 2009, Mar 2009, Apr 2009, May 2009, Jun 2009
Functional Area	Academic Computing
Fund	Empty Demonstration
Commitment Item	Empty Demonstration
Unit	Empty Demonstration

- **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.

BW Web Reporting - BEX_300

How to Log Off BW Web Reports

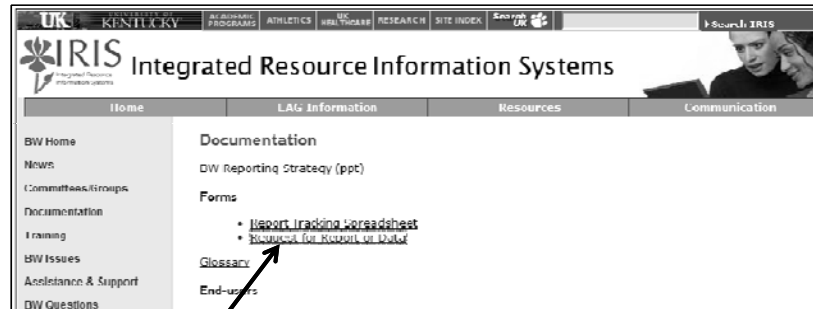


1. Close the BEX report window by clicking the red “X” in upper right corner of the window or tab
2. Close the Report & Query List
3. Click the **Log off** link
4. Close the **myUK** Portal

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.

BW Web Reporting - BEX_300

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

BW Web Reporting - BEX_300

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

BW 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.

BW Web Reporting - BEX_300



Unit 4 Check for Understanding



What's Next?

You have almost completed the **BW Web Reporting Course**.

Here's what's remaining:

- As noted at various points in this course, the BW Web Reporting Practice Guide is available. It is recommended that you practice the various concepts that are discussed in this course.
- Print the **BW Web Reporting Assessment**
- Follow and complete the assessment in BW
- Find, book, start, and complete course **BEX_300_A – BW Web Reporting Assessment**
- On the next 2 slides you will have an opportunity to print both the **BW Web Reporting Practice Guide** and the **BW Web Reporting Assessment**

BW Web Reporting Practice Guide - BEX_300

BW Web Reporting Practice Guide



- As noted at various points in this course, the BW Web Reporting Practice Guide is available. It is recommended that you practice the various concepts that are discussed in this course.
- The guide is optional and not a requirement for completing this course.
- To access the guide:
 1. Click on the **Practice Guide** button below.
 2. The **BW Web Reporting Practice Guide** will open in a separate browser window.
 3. Print the guide

BW Web Reporting - BEX_300

BW Web Reporting Course Assessment



- To get credit for this course you must complete Part 2 - the course assessment:
- To access the assessment:
 1. Click on the **BW Assessment** button below.
 2. The **BW Web Reporting Assessment** will open in a separate browser window.
 3. Print the assessment.
 4. Follow all of the instructions in the assessment.
- Email IRISTraining@email.uky.edu with any questions or issues.


**You must complete this course before you can book
the BW Web Reporting Assessment!**

BW Web Reporting - BEX_300

Final Step – Log off



The final step in completing this course is to:

- Click on the **Log off** button  in the lower corner of this screen.
- You will be returned to the main *myTraining* page for this course.
- The main page will refresh (usually within 30 seconds, depending on network traffic).
- You should receive a green system message similar to this:

“Your Participation in this course has been completed.”

Email IRISTraining@email.uky.edu with any questions or issues.