

Slide 1 - Slide 1



# BEx Web Reporting

BEX\_300



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## Slide 2 - Course Assessment Activities

## ***Course Assessment Activities***



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

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

- Part 1 – Check for Understanding – <sup>Click Box</sup> A series of questions which will be presented at the end of each unit.
- Part 2 – Hands-on Assessment – Further information on the assessment will be given at the end of this course.

## Slide 3 - Course Overview

## 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.

Click Box

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## Slide 4 - Course Objectives

## 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).

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## Slide 8 - What is Business Warehouse?

## 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.

## Slide 9 - What is BW-Web?

## ***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 Click Box
- Add filters
- Change the layout of the columns and rows

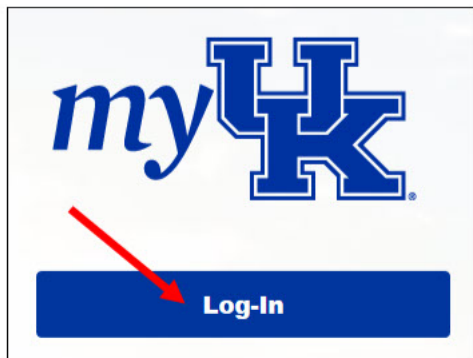
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## Slide 14 - How to Access the myUK Portal

## How to Access the myUK Portal



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



Click Box

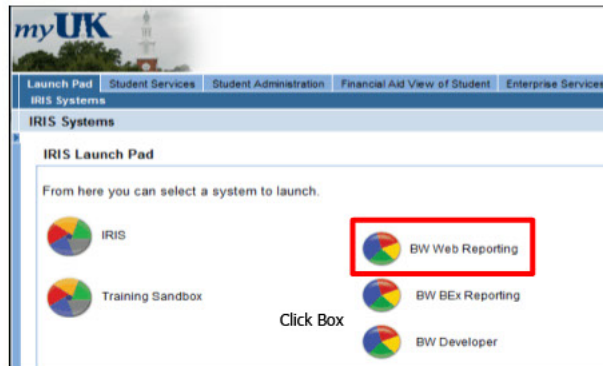
Sign in with your linkblue account

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## Slide 15 - Using the myUK Portal

## 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 the **BW Web Reporting** beach ball icon

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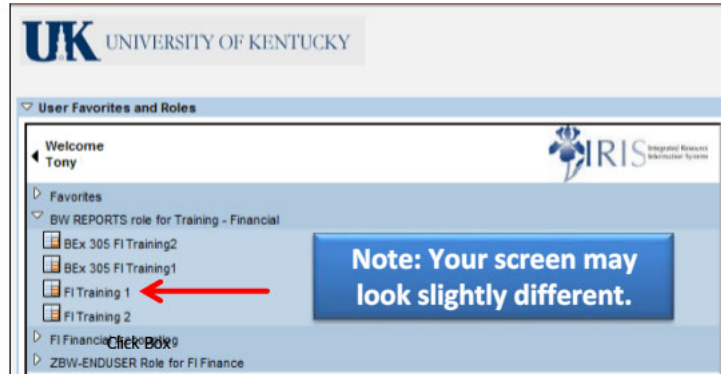
## Slide 16 - BW Reporting

## 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



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Slide 17 - Variables for Ad-Hoc Report

# Variables for Ad-Hoc Report



Variables for Ad Hoc Report			
Fiscal Period/Year (Required) (*)	=	<input type="text"/>	Include <input type="button" value="Insert Row"/>
Company Code (Required) (*)	=	UK00 <input type="button" value="University of Kentucky"/>	Include <input type="button" value="Insert Row"/>
Budget Type (Required) (*)	=	<input type="text"/>	
Funds Center	#	<input type="text"/> UK00/Not assigned To <input type="text"/> 999999999 <input type="button" value="UK00/999999999"/>	
Functional Area	=	<input type="text"/>	Include <input type="button" value="Insert Row"/>
Fund	=	<input type="text"/>	Include <input type="button" value="Insert Row"/>
GL Account	=	<input type="text"/>	Include <input type="button" value="Insert Row"/>
Commitment Item	=	<input type="text"/>	Include <input type="button" value="Insert Row"/>
Grant	=	<input type="text"/> <input type="button" value="Click Box"/>	Include <input type="button" value="Insert Row"/>
<input type="button" value="Execute"/> <input type="button" value="Check"/>			

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

Slide 18 - Entering Your Variables

# Entering Your Variables




**Variables for Ad Hoc Report**

Fiscal Period/Year (Required) (*)	=	<input type="text"/>	<input type="button" value="Selection"/>	Include	<input type="button" value="Insert Row"/>
Company Code (Required) (*)	=	UK00	<input type="button" value="Selection"/>	University of Kentucky	Include <input type="button" value="Insert Row"/>
Budget Type (Required) (*)	=	<input type="text"/>	<input type="button" value="Selection"/>		
Funds Center	#	<input type="text"/>	<input type="button" value="Selection"/>	UK00/Not assigned To 9999999999	<input type="button" value="Selection"/>
Functional Area	=	<input type="text"/>	<input type="button" value="Selection"/>		Include <input type="button" value="Insert Row"/>
Fund	=	<input type="text"/>	<input type="button" value="Selection"/>		Include <input type="button" value="Insert Row"/>
GL Account	=	<input type="text"/>	<input type="button" value="Selection"/>		Include <input type="button" value="Insert Row"/>
Commitment Item	=	<input type="text"/>	<input type="button" value="Selection"/>		Include <input type="button" value="Insert Row"/>
Grant	=	<input type="text"/>	<input type="button" value="Selection"/>		Include <input type="button" value="Insert Row"/>

Execute

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

Slide 19 - Required Variables

# 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 9999999999		
Functional Area	=				Include	Insert Row
Fund	=				Include	Insert Row
GL Account	=				Include	Insert Row
Commitment Item	=				Include	Insert Row
Grant	=				Include	Insert Row

Execute Check Click Box

**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**

Slide 20 - Multiple Selection

# Multiple Selection



The Multiple Selection feature provides additional choices for selecting your criteria

Variables for Ad Hoc Report

Fiscal Period/Year (Required) (*) =	<input type="text"/>	Include	Insert Row
Company Code (Required) (*) =	UK00 University of Kentucky	Include	Insert Row
Budget Type (Required) (*) =	<input type="text"/>		
Funds Center #	UK00/Not assigned To 9999999999 UK00/9999999999		
Functional Area =	<input type="text"/> Click Box	Include	Insert Row
Fund =	<input type="text"/>	Include	Insert Row
GL Account =	<input type="text"/>	Include	Insert Row
Commitment Item =	<input type="text"/>	Include	Insert Row
Grant =	<input type="text"/>	Include	Insert Row

Execute Check

You can:

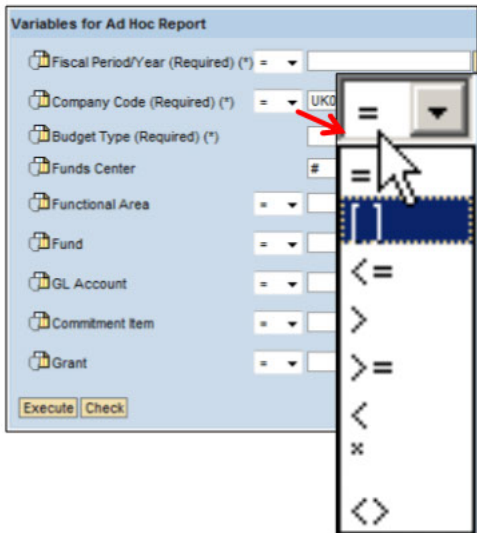
- Choose to **Include** or **Exclude** a filter selection
- Choose to add selections for a variable by clicking on **Insert Row**

Slide 21 - Variable Operators

# 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.

Slide 22 - Selection Types

# Selection Types



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

The screenshot shows a form titled "Variables for Ad Hoc Report" with several input fields. Two red arrows point to the "Fiscal Period/Year (Required) (\*)" and "Funds Center" fields. The "Funds Center" field contains a pound sign (#). To the right of the "Funds Center" field, there is a "Click Box" label. Each field has an "Include" dropdown and an "Insert Row" button. At the bottom left, there are "Execute" and "Check" buttons.

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.

Slide 23 - Selection List

## 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. Click Box
- To see more entries, click on **“The Next 25 Values”** button.

Value Selection for Fiscal Period/Year (Required)

Maximum Number of Hits

Fiscal Period/Year (Required)

- 012/2005
- 001/2006
- 002/2006
- 003/2006
- 004/2006
- 005/2006
- 006/2006
- 007/2006
- 008/2006
- 009/2006
- 010/2006
- 011/2006
- 012/2006
- 013/2006
- 014/2006
- 015/2006
- 000/2007
- 001/2007
- 002/2007
- 003/2007
- 004/2007
- 005/2007
- 006/2007
- 007/2007
- 008/2007

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.

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## Slide 24 - Select – Find – Transfer

## 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.

Click Box

**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.

Value Selection for Fiscal Period/Year (Required)

\*2009 Find

Maximum Number of Hits 200

Fiscal Period/Year (Required)

<input type="checkbox"/>	007/2010
<input type="checkbox"/>	008/2010
<input type="checkbox"/>	009/2010
<input type="checkbox"/>	010/2010
<input type="checkbox"/>	011/2010
<input type="checkbox"/>	012/2010
<input type="checkbox"/>	013/2010
<input type="checkbox"/>	014/2010
<input type="checkbox"/>	015/2010
<input type="checkbox"/>	016/2010

Transfer Close Select All Deselect All The Previous 25 Values

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Slide 25 - Personalization

# 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

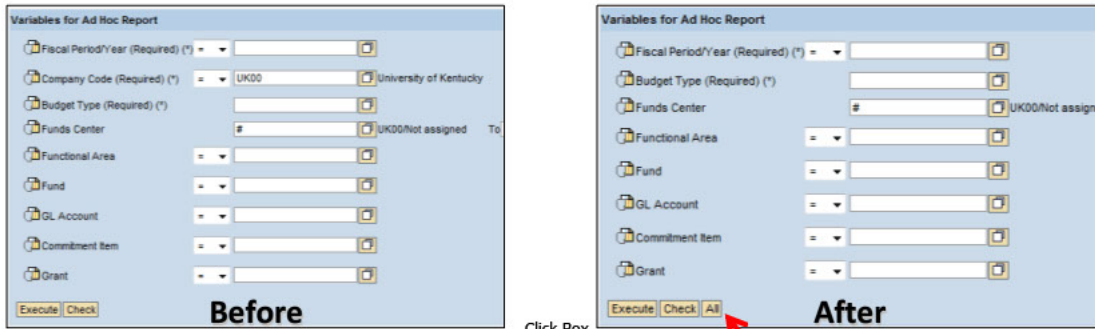
2. Select **Personalize**.

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

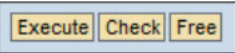
Slide 26 - Personalization (Continued)

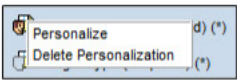
# Personalization (Continued)



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  icon and select **Delete Personalization**

## Slide 27 - Personalization Reminder

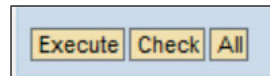
## Personalization Reminder



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.**



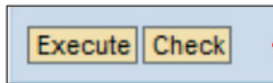
Slide 35 - Check and Execute

# 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.



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 2009	Include	▼
	008/2008	FEB 2009	Include	▼
	009/2008	MAR 2009	Include	▼
	010/2008	APR 2009	Include	▼
	011/2008	MAY 2009	Include	▼
	012/2008	JUN 2009	Include	▼
Company Code (Required) (*)	UK00	University of Kentucky	Include	▼
Budget Type (Required) (*)	ORG	Original Budget	Include	▼
Funds Center	#	UK00/Not assigned	To 000000000	UK00/000000000
Click Box	0440	Academic Computing	Include	▼
Fund			Include	▼
GL Account			Include	▼
Commitment Base			Include	▼
Grant			Include	▼
Execute   Check				

**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.

Slide 36 - The BW Report

# The BW Report



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Open View  
FI Training 1

**Data Analysis** Graphical display Information

Last Data Update: 10/23/2009 01:35:48

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

Functional area	Fund	Budget	Actuals	Parked FI doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 582,885.80	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011080100 FISC AFF&INFO TECH	\$ 827,868.96	\$ 598,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,989.69	19.6
	0011092100 RES UKRF	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
	0011600200 ADM UK SEL Click Box		\$ 0.13			\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)			\$ 50,400.00	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.61	5,643,220.0
	0213884500 STUDENT OPPORTUNITY		\$ 25,333.36	\$ 0.00		\$ (25,333.36)	X
	0417301000 CENTRAL ADMN RENOV		\$ 8,599.56	\$ 0.00		\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCHASE		\$ 804,491.26		\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,008.17</b>	<b>\$ 4,499,088.25</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (887,322.98)</b>	<b>(27.6)</b>

**Data Analysis Tab – Your data appears on this tab.**

**Graphical Display Tab**

**Information Tab**

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Slide 37 - Last Data Update

# Last Data Update



UK UNIVERSITY OF KENTUCKY

Open View  
FI Training 1

Data Analysis Graphical display Information

Last Data Update: 10/23/2009 01:35:48

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

Functional area	Fund	Budget	Actuals	Parked FI doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 562,885.80	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 113,337.87	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011080100 FISC AFFR/FO TECH	\$ 827,866.96	\$ 588,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,669.89	19.6
	0011092100 RES UKRF	\$ 538,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 37,077.27	5.5
	0011600200 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.13			\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)			\$ 50,400.00	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.61	5,643,220.0
	0213884500 STUDENT OPPORTUNITY		\$ 25,333.36	\$ 0.00	\$ 0.00	\$ (25,333.36)	X
	0417301000 CENTRAL OFFICE		\$ 8,599.56	\$ 0.00	\$ 0.00	\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCH		\$ 804,491.26	\$ 0.00	\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,086.17</b>	<b>\$ 4,499,088.25</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (987,122.86)</b>	<b>(27.6)</b>

Click Box

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.



Slide 38 - Rows – Columns – Free Characteristics

# Rows – Columns – Free Characteristics



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IRIS Training 1

Last Data Update: 10/23/2009 01:35:48

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

Rows	Columns	Free Characteristics	Functional Area	Fund	Budget	Actuals	Period Prior	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE		\$ 781,588.32	\$ 1,373,811.13	\$ 0.00	\$ 0.00	\$ 597,422.81	(75.7)		
	0011020100 PROVOST UK GENERAL		\$ 562,889.80	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	23.9		
	0011030100 MED CTR UK GENERAL		\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6		
	0011080100 FISC AFFAIRS/PO TECH		\$ 837,808.98	\$ 598,799.29	\$ (34,443.21)	\$ 182,563.19	\$ 191,899.88	18.6		
	0011090100 RES UNRP		\$ 530,400.00	\$ 591,322.73	\$ 0.00	\$ 0.00	\$ 29,977.27	5.5		
	0011600200 ADM UK SELF SUPPORT		\$ 0.13	\$ 0.13			\$ 0.13	X		
	0011620100 PROVOST SELF SUPPO		\$ 0.00	\$ (92,400.00)			\$ (92,400.00)	X		
	0011680100 SELF SUPPORTING		\$ 0.00	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.56	5,943,228.8		
	0013004000 STUDENT OPPORTUNITY			\$ 20,333.36	\$ 0.00		\$ 20,333.36	X		
	0417301000 CENTRAL ADMIN RENOV			\$ 6,598.56	\$ 0.00		\$ (6,598.56)	X		
	0417302000 MAJOR EQUIP PURCHASE			\$ 894,491.26	\$ 0.00		\$ (894,491.26)	X		
	Result		\$ 3,579,986.17	\$ 4,496,668.25	\$ (34,443.21)	\$ 182,563.19	\$ (860,133.96)	(27.6)		

Click Box

- 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.

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## Slide 39 - Rows – Columns – Free Characteristics (Continued)

## **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.

Slide 40 - Drill-down

# Drill-down



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Open View  
FI Training 1

Data Analysis Graphical display Information


Last Data Update: 10/23/2009 01:35:48

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

Functional area	Fund	Budget	Actuals	Period	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 582,885.80	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011080100 FSC AFFAIRS TECH	\$ 827,866.96	\$ 596,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,369.69	19.6
	0011092100 RES UNRP	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
	0011600200 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.13			\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)			\$ 50,400.00	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.61	5,843,220.0
	0213884500 STUDENT OPPORTUNITY	\$ 25,333.36	\$ 0.00	\$ 0.00	\$ 0.00	\$ (25,333.36)	X
	0417301000 CENTRAL	\$ 8,599.56	\$ 0.00	\$ 0.00	\$ 0.00	\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCHASE	\$ 804,491.26	\$ 0.00	\$ 0.00	\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,096.17</b>	<b>\$ 4,499,088.25</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (987,102.96)</b>	<b>(27.6)</b>

Click Box

**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

Slide 41 - Drill-down (Continued)

# Drill-down (Continued)



GL Account	#	Budget	Actuals	Period Fldisc	Encumbrances	Available Balance	Budget Avail. %
UK00Not assigned		781,588.32				\$ 781,588.32	100.0
Executive - Regular	0000512011	\$ 39,220.93			\$ 0.00	\$ (39,220.93)	X
Executive-Nonproduct	0000512012	\$ 7,225.56			\$ 0.00	\$ (7,225.56)	X
Prof Salaries - Hour	0000512021	\$ 47,580.94			\$ 0.00	\$ (47,580.94)	X
Admin-Nonproductive	0000512022	\$ 6,317.56			\$ 0.00	\$ (6,317.56)	X
Clerical - Regular	0000512031	\$ 37,821.78			\$ 0.00	\$ (37,821.78)	X
Clerical - Nonproduct	0000512032	\$ 6,186.78			\$ 0.00	\$ (6,186.78)	X
Technical-Regular	0000512041	\$ 167,172.36			\$ 0.00	\$ (167,172.36)	X
Technical-Nonproduct	0000512042	\$ 29,102.89			\$ 0.00	\$ (29,102.89)	X
Technical-Perm/Bonus	0000512043	\$ 5,426.33			\$ 0.00	\$ (5,426.33)	X
Technical-Overtime	0000512044	\$ 548.40			\$ 0.00	\$ (548.40)	X
Prof Nonadm-Regul	0000512071	\$ 176,186.10			\$ 0.00	\$ (176,186.10)	X
Prof Nonadm-Nonprod	0000512072	\$ 30,587.12			\$ 0.00	\$ (30,587.12)	X
Stud-NonWork Study	0000513110	\$ 501,242.18			\$ 0.00	\$ (501,242.18)	X
Research Assistants	0000513510	\$ (885.00)			\$ 0.00	\$ 885.00	X
FICA	0000520015	\$ (239.87)		\$ 0.00	\$ 0.00	\$ 239.87	X
Retirement Group 1	0000520016	\$ (109.59)			\$ 0.00	\$ 109.59	X
Click-Box	0000520103	\$ 2,007.50			\$ 0.00	\$ (2,007.50)	X
EHC-Prof Adm	0000520104	\$ 5,277.25			\$ 0.00	\$ (5,277.25)	X
EHC-Clerical	0000520105	\$ 4,124.50			\$ 0.00	\$ (4,124.50)	X
EHC-Tech/Paraprofess	0000520106	\$ 23,231.80			\$ 0.00	\$ (23,231.80)	X
EHC-Prof NonAdm	0000520109	\$ 16,445.00			\$ 0.00	\$ (16,445.00)	X
ELL-Exec/Managerial	0000520203	\$ 43.96			\$ 0.00	\$ (43.96)	X
ELL-Prof Adm	0000520204	\$ 52.33			\$ 0.00	\$ (52.33)	X
ELL-Clerical	0000520205	\$ 45.15			\$ 0.00	\$ (45.15)	X

“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.

Slide 42 - Drill-across

# Drill-across





Table Analysis Graphical display Information

Last Data Update: 10/06/2009 00:10:21

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

Functional area	Fund	GL Account	Value type in FM	Budget		Overall Result	Actuals		Overall Result
				70	02		70	02	
				Commitments and Actuals	Budget Entry Documents (from BCS)		Commitments and Actuals	Budget Entry Documents (from BCS)	
0440 Academic Computing	0011010100	ADMINISTRATION GK	UCS/Net assigned		\$ 701,588.32	\$ 701,588.32			
			Executive - Regular	0000512311			\$ 39,220.93		\$ 39,220.93
			Executive - Productiv	0000512312			\$ 7,225.56		\$ 7,225.56
			Prof Salaries - Host	0000512321			\$ 47,582.94		\$ 47,582.94
			Admin-Nonproductive	0000512322			\$ 6,317.58		\$ 6,317.58
			Clerical - Regular	0000512331			\$ 37,821.78		\$ 37,821.78
			Clerical - Nonproductiv	0000512332			\$ 8,186.78		\$ 8,186.78
			Technical-Regular	0000512341			\$ 167,172.36		\$ 167,172.36
			Technical-Nonproductiv	0000512342			\$ 29,102.39		\$ 29,102.39
			Technical-Prof/Bonus	0000512343			\$ 4,420.33		\$ 4,420.33
			Technical-Overtime	0000512344			\$ 540.43		\$ 540.43
			Prof Nonadm-Regular	0000512371			\$ 176,198.19		\$ 176,198.19
			Prof Nonadm-Nonprod	0000512372			\$ 39,097.12		\$ 39,097.12
			Stud-NonWork Study	0000513110			\$ 501,242.18		\$ 501,242.18
			Research Assistants	0000513510			\$ (685.00)		\$ (685.00)
			FICA	0000520915			\$ (239.07)		\$ (239.07)
			Retirement Group I	0000520916			\$ (109.59)		\$ (109.59)
			ENC-Exec/Managerial	0000520103			\$ 2,007.50		\$ 2,007.50
			ENC-Prof Adm	0000520104			\$ 5,277.26		\$ 5,277.26
			ENC-Clerical	0000520105			\$ 4,124.59		\$ 4,124.59
			ENC-Tech/Para/Non	0000520106			\$ 23,221.89		\$ 23,221.89
			ENC-Prof NonAdm	0000520109			\$ 16,445.00		\$ 16,445.00
			ELI-Exec/Managerial	0000520203			\$ 43.98		\$ 43.98
			ELI-Prof Adm	0000520204			\$ 92.33		\$ 92.33
			ELI-Clerical	0000520205			\$ 48.15		\$ 48.15


Click Box

- **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.

Slide 43 - Filters

# 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.

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Slide 44 - Filters (continued)

## Filters (continued)

Functional area	Fund	GL Account	Value type in FY	Budget	Actuals	Parked P/disc	Encumbrances	Available balance	Budget Avail. %
				70	70	70	70	70	70
				Commitments and Actuals	Commitments and Actuals	Commitments and Actuals	Commitments and Actuals	Commitments and Actuals	Commitments and Actuals
0440 Academic Computing	0417301000	CENTRAL ADMIN RENOV	Environmental Charge	0000030305	\$ 20.54	\$ 0.00		\$ (20.54)	X
			Job Order Charges	0000030328	\$ 1,848.38	\$ 0.00		\$ (1,848.38)	X
			Unexp PR Min Renewal	0000030330	\$ 1,847.29	\$ 0.00		\$ (1,847.29)	X
			PR PRO Labor offset	0000000000	\$ (1,377.65)			\$ (1,377.65)	X
			UKS0000000704	0000000700	\$ 1,377.65			\$ (1,377.65)	X
			<b>Result</b>		<b>\$ 5,616.21</b>	<b>\$ 9.80</b>		<b>\$ (5,616.21)</b>	<b>X</b>

**Filter Panel (Left):**

- Fiscal year/period
- Funded Program
- LEASE PURCHASE UPS SYSTEM
- Funds Center
- Grant

**Filter Detail Panel (Right):**

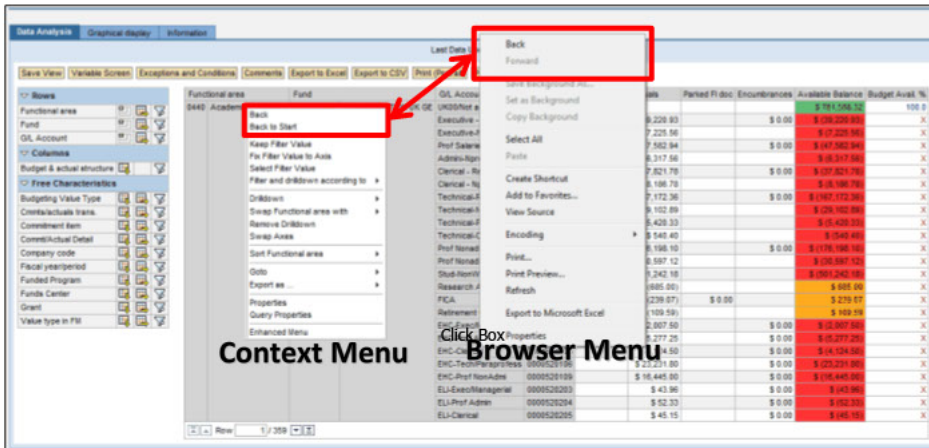
- Fiscal year/period
- Funded Program
- LEASE PURCHASE UPS SYSTEM
- Funds Center

- 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 .

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Slide 45 - Context Menus

# Context Menus



Context Menu Click Box Browser Menu

- **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, 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.

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## Slide 46 - Context Menus (Continued)

## ***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 Click Box
  - 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).

## Slide 47 - Context Menu Items (Reference slide 1 of 2)

## **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**

Click Box

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.

## Slide 48 - Context Menu Items (Reference slide 2 of 2)

## ***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.

Click Box

### **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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Slide 55 - Save View

# Save View



The screenshot shows the IRIS Data Analysis interface. At the top, there are tabs for 'Data Analysis', 'Graphical display', and 'Information'. Below the tabs, there are several buttons: 'Save View' (highlighted in red), 'Variable Screen', 'Exceptions and Conditions', 'Comments', 'Export to Excel', 'Export to CSV', 'Print (Portrait)', 'Print (Landscape)', and 'Show Repeated Texts'. The main area contains a table with columns for Functional area, Fund, Budget, Actuals, Parked FI doc, Encumbrances, Available Balance, and Budget Avail. %. The table data is as follows:

Functional area	Fund	Budget	Actuals	Parked FI doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 582,885.80	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011050100 FISC AFF&INFO TECH	\$ 627,868.96	\$ 596,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,969.69	19.6
	0011060100 RES UKRF	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
	0011660200 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.13	\$ 0.00	\$ 0.00	\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)	\$ 0.00	\$ 0.00	\$ (50,400.00)	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ (2,821.51)	5,643,220.0
	0213684500 STUDENT OPPORTUNITY	\$ 25,333.36	\$ 0.00	\$ 0.00	\$ 0.00	\$ (25,333.36)	X
	0417301000 CENTRAL ADMIN RENOV	\$ 8,599.56	\$ 0.00	\$ 0.00	\$ 0.00	\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCHASE	\$ 804,491.26	\$ 0.00	\$ 0.00	\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,086.17</b>	<b>\$ 4,499,088.26</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (987,122.06)</b>	<b>(27.6)</b>

Below the table, there is a 'Click Box' label.

- 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.

## Slide 56 - Save View Description

## Save View Description

A screenshot of a 'Save View' dialog box. The 'Description' field is highlighted with a red border and contains the text 'DELUCIA: Budget and Actuals for FY'. The 'Technical Name' field contains 'Zdelucia\_5000'. There is an unchecked checkbox for 'Overwrite Existing View' and 'Save' and 'Cancel' buttons at the bottom.

- 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.

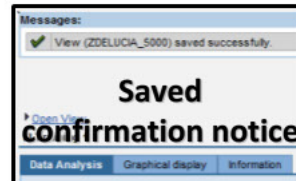
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Slide 57 - Save View Technical Name

# 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.



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## Slide 58 - Save View (Continued)

## ***Save View (Continued)***

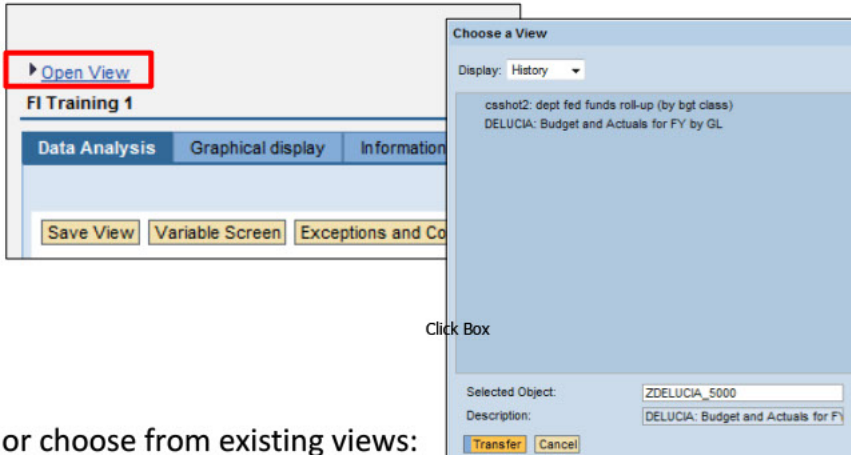


- The purpose of the naming standard is to help identify the views you have saved. Using the naming convention will quickly identify the person who saved the view and will make it easier for each user to know their next view number.
- Since technical names have to be unique in the SAP BW system, you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



## Slide 59 - Open View – History

## 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

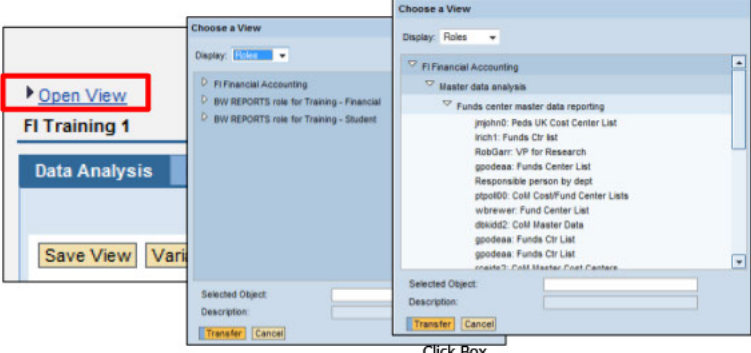
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## Slide 60 - Open View – Roles



## Open View – Roles



Click Box

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.

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## Slide 61 - Open View

## 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.

Click Box

### 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

## Slide 62 - Save &amp; Open View

## 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: [analytics@uky.edu](mailto:analytics@uky.edu). Specify the view you want deleted and be sure to include the **Technical Name** and the **Description** of the view.

Click Box

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**.

Slide 69 - Variable Screen

# Variable Screen



Data Analysis Graphical display Information

Last Data Update: 10/27/2009 00:37:19

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

Functional area	Fund	Budget	Actuals	Parked FI doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 582,885.00	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.07	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011080100 FISC AFF&INFO TECH	\$ 827,868.96	\$ 598,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,989.68	19.6
	0011092100 RES UKRF	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
	0011600200 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.13	\$ 0.00	\$ 0.00	\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)	\$ 0.00	\$ 0.00	\$ 50,400.00	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.58)	\$ 0.00	\$ 0.00	\$ 2,821.61	5,643,220.0
	0213884500 STUDENT OPPORTUNITY		\$ 25,333.36	\$ 0.00	\$ 0.00	\$ (25,333.36)	X
	0417301000 CENTRAL ADMIN RENOV		\$ 8,599.56	\$ 0.00	\$ 0.00	\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCHASE		\$ 804,491.26	\$ 0.00	\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,086.17</b>	<b>\$ 4,499,088.25</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (987,122.06)</b>	<b>(27.6)</b>

Click Box

- 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.

Slide 70 - Exceptions & Conditions

# Exceptions & Conditions



Data Analysis Graphical display Information Last Data Update: 10/27/2009 00:37:19

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

Functional area	Fund	Budget	Actuals	Parked FI doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	0011010100 ADMINISTRATION UK GE	\$ 781,588.32	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ (591,422.81)	(75.7)
	0011020100 PROVOST UK GENERAL	\$ 582,885.00	\$ 449,547.93	\$ 0.00	\$ 0.00	\$ 133,337.07	22.9
	0011030100 MED CTR UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
	0011080100 FISC AFF&INFO TECH	\$ 827,868.96	\$ 598,759.29	\$ (35,443.21)	\$ 102,563.19	\$ 161,989.08	19.6
	0011092100 RES UKRF	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
	0011600200 ADM UK SELF SUPPORT	\$ 0.00	\$ 0.13	\$ 0.00	\$ 0.00	\$ (0.13)	X
	0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (50,400.00)	\$ 0.00	\$ 0.00	\$ 50,400.00	X
	0011680100 SELF SUPPORTING	\$ 0.05	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.61	5,643,220.0
	0213884500 STUDENT OPPORTUNITY	\$ 0.00	\$ 25,333.36	\$ 0.00	\$ 0.00	\$ (25,333.36)	X
	0417301000 CENTRAL ADMIN RENOV	\$ 0.00	\$ 8,599.56	\$ 0.00	\$ 0.00	\$ (8,599.56)	X
	0417302000 MAJOR EQUIP PURCHASE	\$ 0.00	\$ 804,491.26	\$ 0.00	\$ 0.00	\$ (804,491.26)	X
	<b>Result</b>	<b>\$ 3,579,086.17</b>	<b>\$ 4,499,088.25</b>	<b>\$ (35,443.21)</b>	<b>\$ 102,563.19</b>	<b>\$ (987,122.06)</b>	<b>(27.6)</b>

Click Box

- **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.

Slide 71 - Exceptions

# Exceptions



Functional area	Budget	Actuals	Parked F1 doc	Encumbrances	Available Balance	Budget Avail. %
0440 Academic Computing	\$ 781,588.52	\$ 1,373,011.13	\$ 0.00	\$ 0.00	\$ 591,422.81	(75.7)
0011020100 ADMINISTRATION UK GE	\$ 582,885.80	\$ 449,547.83	\$ 0.00	\$ 0.00	\$ 133,337.87	22.9
0011030100 PROVOST UK GENERAL	\$ 856,343.04	\$ 791,244.42	\$ 0.00	\$ 0.00	\$ 65,098.62	7.6
0011080100 MED CLINIC GENERAL	\$ 827,868.96	\$ 598,759.29	\$ (35,443.21)	\$ 102,583.19	\$ 181,968.69	19.8
0011080100 FSC AFFAIRS TECH	\$ 530,400.00	\$ 501,322.73	\$ 0.00	\$ 0.00	\$ 29,077.27	5.5
0011080200 RES UKRF	\$ 0.00	\$ 0.13	\$ 0.00	\$ 0.00	\$ 0.00	X
0011600200 ADM UK SELF SUPPORT	\$ 0.00	\$ (56,400.00)	\$ 0.00	\$ 0.00	\$ 56,400.00	X
0011620100 PROVOST SELF SUPPO	\$ 0.00	\$ (2,821.56)	\$ 0.00	\$ 0.00	\$ 2,821.56	\$ 643,228.0
0213884500 STUDENT OPPORTUNITY	\$ 0.00	\$ 4,333.36	\$ 0.00	\$ 0.00	\$ (4,333.36)	X
0417301000 CENTRAL ADMIN RENOV	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ (8,069.94)	X
0417302000 MAJOR EQUIP PURCHASE	\$ 0.00	\$ 804,491.20	\$ 0.00	\$ 0.00	\$ (804,491.20)	X
Result	\$ 3,579,088.17	\$ 4,499,088.25	\$ (35,443.21)	\$ 102,583.19	\$ 987,322.88	(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.

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Slide 72 - Seeing Exception Criteria

# Seeing Exception Criteria



The screenshot displays the IRIS system's 'Define Exception' dialog box. On the left, a table lists various exceptions, with 'Unexpended bud' selected. A context menu is open over this entry, showing options: 'Display', 'Deactivate', and 'Enhanced Menu'. A red arrow points from the 'Display' option to the 'Define Exception' dialog. The dialog itself is titled 'Define Exception' and contains the following information:

- Description: Unexpended budget (checked) Active
- Evaluation for Budget & actual structure: Available Balance
- Exception Values table:

<input checked="" type="checkbox"/>	Between	9,999,999.999 000000-	0.010000-	Bad 3
<input checked="" type="checkbox"/>	Between	0.000000	5,000 000000	Critical 2
<input checked="" type="checkbox"/>	Between	5,001.000000	9,999,999.999 000000	Good 1
- Validity Area of Exception table:

Validity Area for All Characteristics Not Listed	Operator	Value
Fiscal year/period	Standard Operator	
Company code	Standard Operator	
Funds Center	Standard Operator	
Commitment item	Standard Operator	
Value type in FM	Standard Operator	
Grant	Standard Operator	
Comm/Actual Detail	Standard Operator	
Cmnts/actuals trans.	Standard Operator	
Budgeting Value Type	Standard Operator	
GL Account	Standard Operator	
Funded Program	Standard Operator	
Functional area	Standard Operator	
Fund	Standard Operator	

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



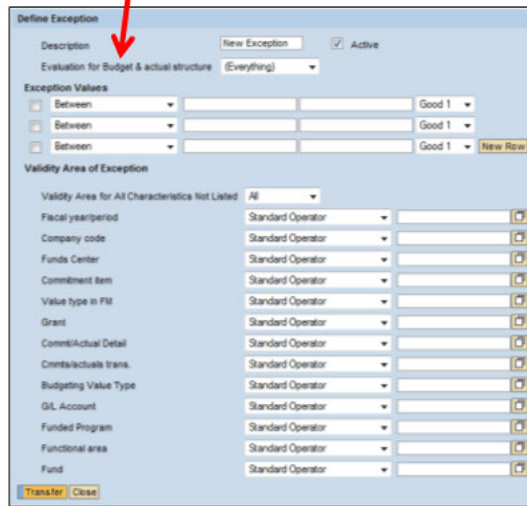
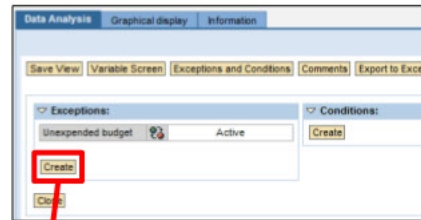
Slide 73 - Creating a New Exception

# 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



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Slide 74 - Creating a New Condition

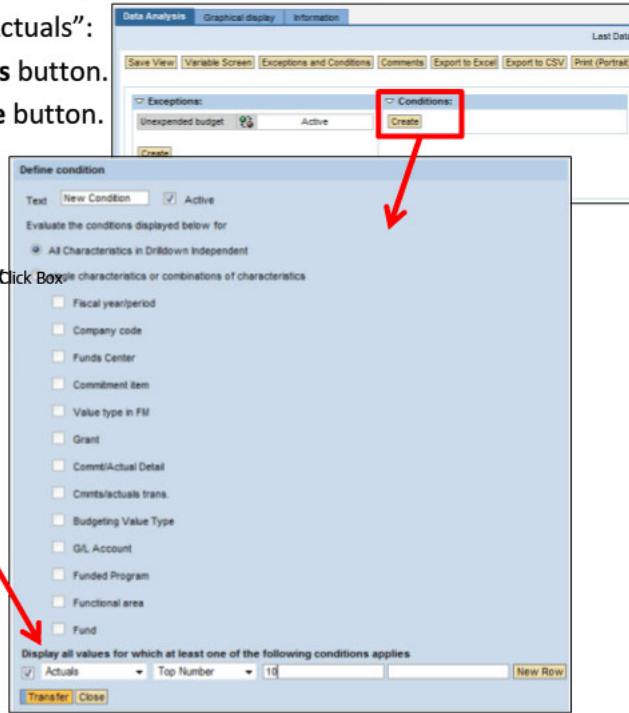
# Creating a New Condition



Conditions let you change a report depending on specified criteria.

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

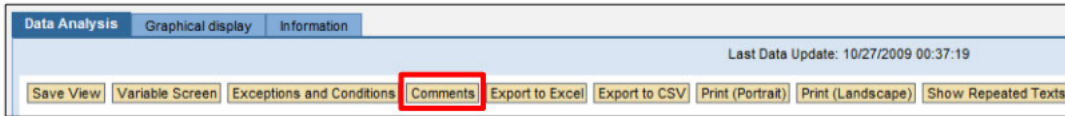
1. Click on the **Exceptions and Conditions** button.
2. In the Conditions area, click the **Create** button.
3. Enter the Text (name or description):  
Example – **Top 10 Actuals**
4. At the bottom,  
click in the **Display all values** checkbox
5. In the first drop-down, select **"Actuals"**
6. In 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



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## Slide 75 - Comments

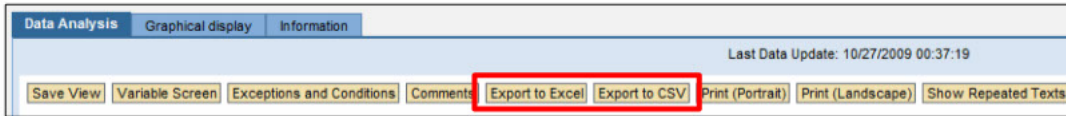
## Comments



- 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 <sup>Click Box</sup> 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.

## Slide 76 - Export to Excel &amp; CSV

## 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.

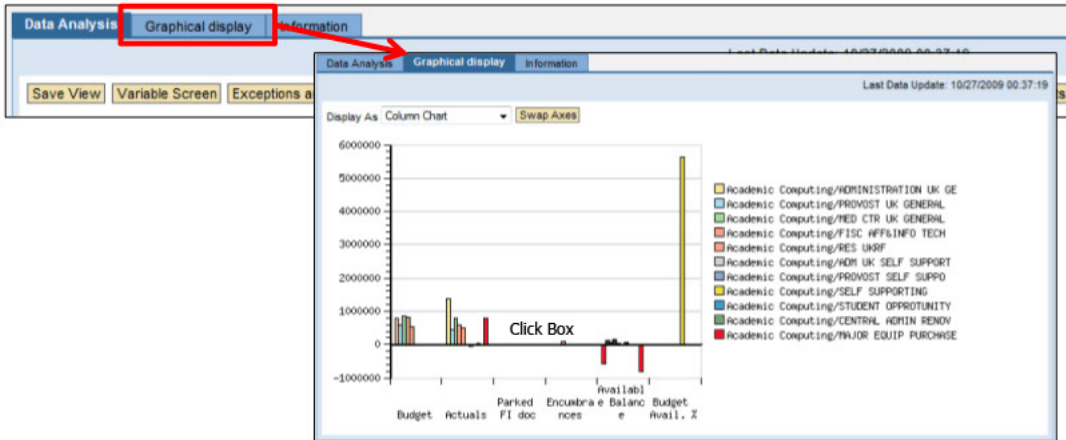
Click Box

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

Slide 77 - Graphical Display Tab

# 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.**

Slide 78 - Information Tab

# Information Tab



The screenshot shows the 'Information' tab of a reporting system. At the top, there are navigation tabs: 'Data Analysis', 'Graphical display', and 'Information' (which is highlighted with a red box). Below these are buttons for 'Save View', 'Variable Screen', 'Exceptions and Conditions', and 'Comments'. The main content area is titled 'Query Documentation' and contains several sections:

- Information on Query:** A table with the following data:
 

Key Date	10/27/2009
Status of Data	10/27/2009 00:37:19
Changed At	09/23/2009 17:09:22
Last Changed By	DCLAUNCH
Last Refreshed	10/27/2009 14:30:33
Query Description	FI Training 1
Query Technical Name	QZPU_C03_5999
- Static Filter:** A list of filters including 'Chart of accounts' (University of Kentucky Chart of Accounts), 'Company code' (University of Kentucky), 'Fiscal year/period' (JUL 2008, AUG 2008, SEP 2008, OCT 2008, NOV 2008, DEC 2008, JAN 2009, FEB 2009, MAR 2009, APR 2009, MAY 2009, JUN 2009), 'Fiscal Year Variant' (145), 'FII area' (University of Kentucky), 'Functional area' (Academic Computing), and 'Funds Center' (#.9999999999).
- Dynamic Filter:** A section for filters that change based on user input.
- Variable Values:** A list of variables and their values, such as 'GL Account' (Empty Demarcation), 'Budget Type (Required)' (Original Budget), 'Funds Center' (UK00Ret assigned\_UK009999999999), 'Company Code (Required)' (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 Demarcation), 'Commitment Item' (Empty Demarcation), and 'Grant' (Empty Demarcation).

A red arrow points from the 'Information' tab to the 'Information on Query' section. A 'Click Box' label is positioned near the bottom left of the screenshot.

- **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.

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## Slide 79 - How to Log Off BW Web Reports

## 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 <sup>Click Box</sup> 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.



## Slide 80 - Need Assistance?

## ***Need Assistance?***



If you need assistance, please send an email to  
[analytics@uky.edu](mailto:analytics@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.  
Click Box

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## Slide 88 - BW Web Reporting Course Assessment

## ***BEx Web Reporting Assessment***



- To get credit for this course you must complete Part 2 - the course assessment:
- To access the assessment:
  1. Click on the **BEx Web Reporting Assessment** button below (The assessment document will open in a separate browser window.)
  2. Print the assessment Click Box
  3. After you print the assessment, click on the **Continue** button below to proceed to the last slide of this WBT
  4. After you successfully complete THIS WBT, follow all of the instructions in the assessment

BEx Web Reporting Assessment

Continue

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Slide 89 - Final Step – Log off



This concludes the **BEX\_300 BEx Web Reporting** course.

You may now close this browser window.

Click Box

*The End*

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