



Business Objects For End Users BI_BOBJ_200



UK UNIVERSITY OF KENTUCKY

Course Content



This optional course focuses on how the end user displays and updates a Business Objects report, including an overview of available exporting options. Topics include an overview of the Business Objects screens, changing variables, exporting a report and tracking data changes.

- Introduction
- Unit 1 – Business Objects Reports
- Unit 2 – Changing Variables
- Unit 3 – Tracking Changes
- Unit 4 – Exporting a Report
- Unit 5 – Saving a Report
- Course Summary

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Learning Objectives



Upon completing this course, you will be able to:

- Understand Business Objects (BOBJ) terminology and navigation
- Run a BOBJ report
- Refresh a report
- Change the format of tracking changes
- Export a report
- Save a report



Terminology



Classes FI Budget vs Actuals	<ul style="list-style-type: none">• Logical groupings of objects that map to data in the database
Dimensions Funds Center	<ul style="list-style-type: none">• Retrieves data from the database, typically character-type format
Details Funds Center Key	<ul style="list-style-type: none">• Provides descriptive data about the dimension
Measures Available Budget	<ul style="list-style-type: none">• Retrieves numeric data resulting from calculations on data in the database
Query Filter Current Students	<ul style="list-style-type: none">• Predefined filter that restricts the information retrieved from the database• Not all reports have predefined Query Filters



Business Objects Reports

Unit 1 – Business Objects Reports

- Business Objects (BOBJ)
- How to Access
- Document List
- Finding and Opening a Report
- Business Objects – Infoview Navigation

Business Objects (BOBJ)



- Documents may be created from different data sources.
 - Examples: Business Warehouse (BEx), GRADS, Faculty Database (FDB)
- BOBJ has a web interface where users can check out reports in their role-based folders and save their own formatted views of the report in their **My Favorites** folder.
- BOBJ supports tracking changes made to the data in the report.

Business Objects (BOBJ)



- Reports are located on **myReports** tab on **myUK** portal.
- After Area Security Officer (ASO) approval is received to activate BOBJ access, users will have access to the same modules they do for the Business Warehouse (BW) if this access already exists.
- If no prior BW access exists, the Area Security Officer (ASO) will determine the appropriate BOBJ access.

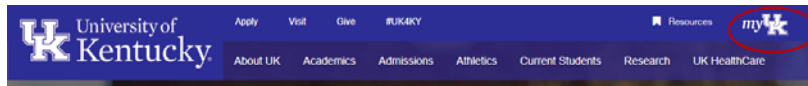


How to Access



Use the following steps to access BOBJ reports:

- From the UK homepage, click **myUK**



How to Access



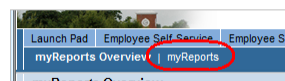
- Log on to the **myUK** portal using your link blue **User ID** (AD or MC User ID) and **Password**



- Click **myReports**



- Click **myReports**

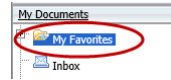


- **Note:** A new window will open automatically



IRIS
Integrated Resource
Information Systems

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- A screenshot of the SAP menu bar. The 'Documents' menu is open, and 'My Documents' is circled in red. Other visible options include 'Public Folders'.



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- The screenshot shows the SAP Fiori 'My Documents' interface. At the top, there's a navigation bar with 'Home' and 'Documents' tabs. Below this is a breadcrumb trail: 'View > New > Organize > Send > More Actions'. The main content area is titled 'My Documents' and contains a 'Folders' section. Under 'Folders', there is a folder icon and the text 'Public Folders', which is circled in red.

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- [illegible]



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- The screenshot shows the 'Table' list in the 'Financials' application. The table lists various budget-related tables. The table 'FL_Msny_Deptamental Budget used for 6L_BOB Budget vs Actual' is highlighted with a red circle.
- | Table * | Last Run | Type | Owner | Instances |
|---|---------------------|------|-----------------|-----------|
| FL_McCool2: Ledger - Funds Center Balances - Budget vs Actual (Funds Center Balances - Budget vs Actual): Ledger - Funds Center Balances - Budget vs Actual_ZNY_C02_ZBOB1 | | Webi | mccool2@uky.edu | 0 |
| FL_Msny_BOB1_300 Exercise Report: Bdg Exercise (Funds Center Balances: Budget vs Actual) | | Webi | kather2@uky.edu | 0 |
| FL_Msny_BOB1_End User Report: Budget vs Actual (Funds Center Balances: Budget vs Actual) | Nov 3, 2009 7:37 AM | Webi | msny@uky.edu | 1 |
| FL_Msny_Deptamental Budget used for 6L_BOB Budget vs Actual | | Webi | msny@uky.edu | 0 |

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Business Objects – Infoview Navigation



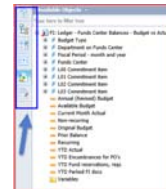
- The left side of the screen is the **Summary/Manager** area, and the right side displays the report details.

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Ledger: Funds Center Balances - Budget vs. Actual

Funds Center Key	Funds Center	Commitment Item Key	Commitment Item	Original Bal.
701000000	UNIVERSITY-GENERAL	400000	Fees - Bad Debt	
	UNIVERSITY-GENERAL	410000	Appt-Reserve State	\$ (115,300)
	UNIVERSITY-GENERAL	410210	Appt-State Debt Ser	\$ (8,649)
	UNIVERSITY-GENERAL	410220	Appt-State Special	
	UNIVERSITY-GENERAL	410230	Tolerance Approp	
	UNIVERSITY-GENERAL	420100	Grants - SF Noncap	\$ (148)
	UNIVERSITY-GENERAL	420101	Capitol Gifts	
	UNIVERSITY-GENERAL	430100	Inv Inc - Churnout	\$ (10,109)
	UNIVERSITY-GENERAL	430400	Inv Inc-Bad Debt	
	UNIVERSITY-GENERAL	430600	Inv Inc Distributed	
	UNIVERSITY-GENERAL	431000	Endow Inv - Fund Bal	\$ (2)
	UNIVERSITY-GENERAL	431001	Endow Inv-KY Land Cr	\$ (3)
	UNIVERSITY-GENERAL	440000	Commitments - Other	

- The **Summary/Manager** contains summary information and several tools for changing your report.



User Prompt Input



- With the **User Prompt Input** view, the **Summary/Manager** provides you access to the variables for the report, which you can use to change data in the report.

User Prompt Input - Advanced Run

Business Area From (optional)

Business Area To (optional)

Commitment Item From (optional)

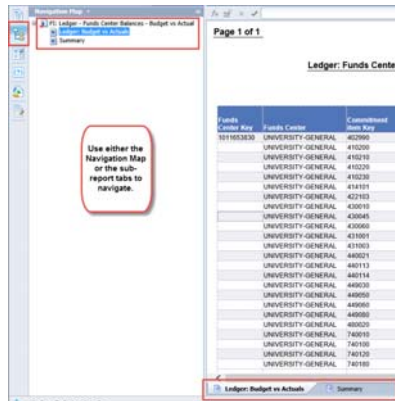
Commitment Item To (optional)

Company Code (Required) From University of Kentucky

Navigation Map and Tabs



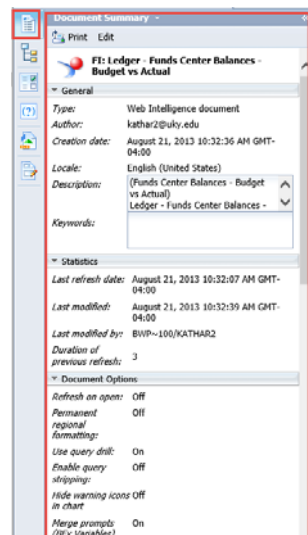
- The **Navigation Map** and **Tabs** provide a quick way to move to the various sub-reports in the report.
- **Note:** Reports may contain two or more sub-reports consisting of tables, graphs, charts, etc.



Document Summary



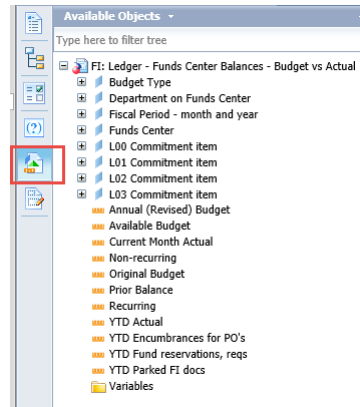
- **Document Summary** provides information about the report.
- Information includes:
 - Document name
 - Creator
 - Who modified it last
 - Description
 - Creation date
 - Last refresh date
 - Document properties
 - A list of the prompts and values



Available Objects



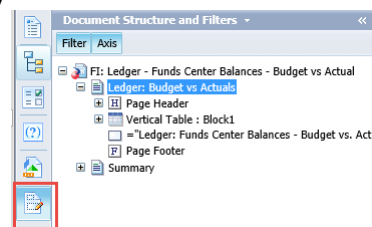
- **Available Objects** display objects available to use in the report.
- **Note:** The objects displayed can be added to the report by dragging the object to the report and dropping it.



Document Structure and Filters



- **Document Structure and Filters** display the structure of the report and its filters.
- Information includes:
 - A summary of the sub-reports
 - Formulas and where they are located, such as in the header
 - Block type, such as "Vertical Table: Block 1"



Refresh Date



- The report displays the last time this report was saved at the bottom right corner of the screen.

Grant Ledger - Executive Summary
for DEC 2017

	Outright From Date	Outright To Date	External Reference Number	Fund Type	Budget	Committed Commitments & Documents in Process
INALDOMIDE FOR THERAPY OF RAD	02/02/2006	12/31/2017	CC-5013	Sponsor	194,625.00	.00
LAYGROUNDS 2004	01/01/2005	12/31/2017	NO ID	Sponsor	20,000.00	.00
RENOMICS ALLIANCE	09/01/2006	06/30/2018	NO ID	Sponsor	321,127.00	.00
INFORMATION CENTER	01/01/2007	03/31/2019	07MOC-LEX04	Sponsor	189,379.00	.00
	07/01/2016	06/30/2017	P033A161611	Sponsor	772,713.23	
	07/01/2017	06/30/2018	P033A171011	Sponsor	815,383.00	
	07/01/2017	06/30/2018	P063P170150	Sponsor	12,429,238.00	
	07/01/2017	06/30/2018	P007A171011	Sponsor	601,756.00	
	07/01/2017	06/30/2018	P379T180150	Sponsor	40,000.00	
UNICE FOR PELL GRANT 2017-2018	07/01/2017	06/30/2018	P063Q170150	Sponsor	27,000.00	
6-17 TO 17-18	07/01/2017	06/30/2018	P033A161611	Sponsor	129,442.00	
RANT 17-18	07/01/2017	06/30/2018	P406A170150	Sponsor	5,500.00	
AL PROJECT COMPLIANCE ASSISTANCE TOO	07/01/2007	12/31/2019	NO ID NUMBER	Sponsor	684,144.00	
	06/29/2006	05/31/2018	S00002054	Sponsor	41,864.00	.00
TER, PROSPECTIVE, OBSERVATIONAL S	07/01/2008	06/30/2019	A401067	Sponsor	109,089.00	.00
TO DETERMINE THE LONG TERM SAFET	11/21/2008	05/17/2018	C13008	Sponsor	364,306.00	.00

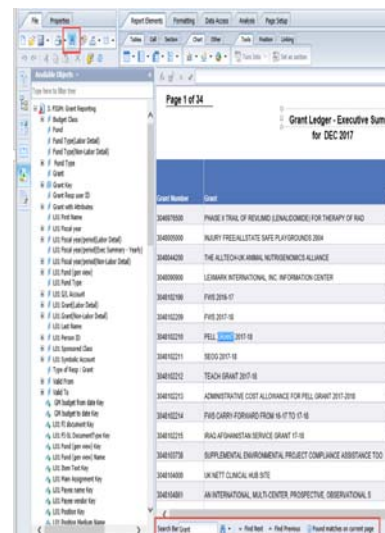
Current Month Labor Detail Current Month Labor Detail (By Person) Current Month Non-Labor Detail Grant Charts

Track changes: Off Page 1 of 1 100% 23 days ago

Find



- Find** provides a way to search for specific data in the report.
- To use **Find**, click on the binoculars and enter the search term in the **Search bar** field and click Enter
- Options include:
 - Ignore case
 - Match case
 - Find Next
 - Find Previous





Unit 1

Check for Understanding

Unit 1 Summary

- BOBJ has a web interface where users can check out reports in their role-based folders and save their own formatted views of the report.
- Reports are located on myReports tab on myUK portal.
- The Summary/Manager contains summary information and several tools for changing your report or viewing the data in different formats.
- Business Objects reports can be created from multiple data sources, such as Business Warehouse, Faculty Database, GRADS, etc.
- Business Objects is accessed from the myUK portal.

Unit 2



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Grant Ledger - Executive Summary
for DEC 2017

Grant Number	Grant	Budget #
354870000	PHASE 6 TRIAL OF REVLMID (LENKLOMIDE) FOR THERAPY OF RAD	02/02/208
354890000	INJURY FREE/ALLSTATE SAFE PLAYGROUNDS 2004	01/01/200
354894200	THE ALLTECH-UK ANIMAL NUTRIGENOMICS ALLIANCE	09/01/200
354890900	LEXMARK INTERNATIONAL, INC. INFORMATION CENTER	01/01/200
3548102190	FWS 2016-17	07/01/201
3548102209	FWS 2017-18	07/01/201
3548102210	PELL GRANT 2017-18	07/01/201
3548102211	SEOG 2017-18	07/01/201
3548102212	TEACH GRANT 2017-18	07/01/201
3548102213	ADMINISTRATIVE COST ALLOWANCE FOR PELL GRANT 2017-2018	07/01/201
3548102214	FWS CARRY-FORWARD FROM 16-17 TO 17-18	07/01/201
3548102215	IRAO AFGHANISTAN SERVICE GRANT 17-18	07/01/201

Changing Variables

Unit 2 – Changing Variables



- Variables
- User Prompt Input Panel
- Prompt Window

Variables



- Variables are used to limit the data in a report, and you can enter the value for the variable in one of two ways:
 - Enter the value in the variable field in the **User Prompt Input** panel;
 - OR**
 - Enter the value by using the **Prompt** window when running the report
-
- Required variables **MUST** have a value entered or you will be unable to refresh the data in the report

Required Variables



- On the **User Prompt Input** panel, required variables are shown as **(Required)**.

- On the **Prompt** window, they are shown with a **red arrow** and as **(Required)**.
 - You may need to use the scroll bar to see all the required variables in the list.

Business Warehouse Variables



- Business Warehouse variables listed with ranges display with a **From** and a **To** field.

- An entry must be made in both fields or more data than intended may be pulled.
 - Example: If you enter the **Fiscal Year/Period From** with 002/2010 and no **Fiscal Year/Period To** entry, you will pull data from August 2009 to the current date.

User Prompt Input Panel



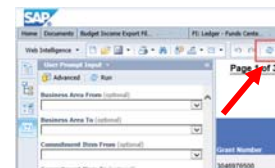
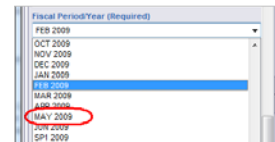
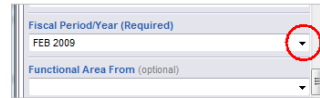
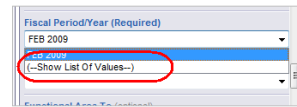
Use the following steps to change the value for a variable in the **User Prompt Input** panel:

- Open the Business Objects report
- Make sure you have the **User Prompt Input** panel displayed
- To change the value, click the down arrow in the variable field

User Prompt Input Panel



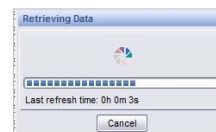
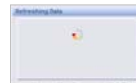
- Select **(--Show List of Values--)**
- Click the down arrow a second time
- Double-click on the value
- **Note:** If this is a **To/From** field, be sure to select a value for the corresponding field.
- Click the **Refresh Data** icon



User Prompt Input Panel



- A system message will display.
- When the **Prompt** window displays, click **Run Query**
- **Note:** A system message will display which indicates the time it took for the last refresh.
- The time for this refresh may change depending on how much data is being pulled.



Prompt Window



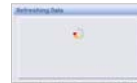
Use the following steps to change the value of a variable using the

Prompt window:

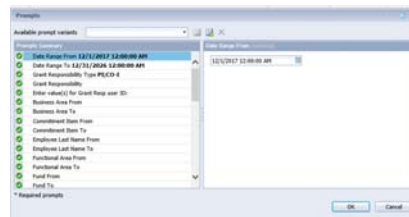
- Open the report
- Click the **Refresh Data** icon



- A system message will display.



- Variables are located at the left of the window.



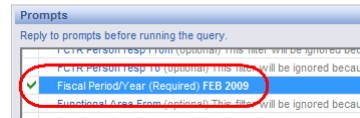
Prompt Window



- Use the scrollbar to scroll to the variable



- Single-click on the variable



- Click **Refresh Values**

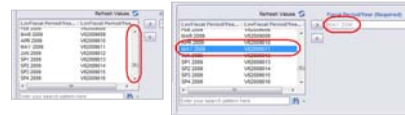


Prompt Window



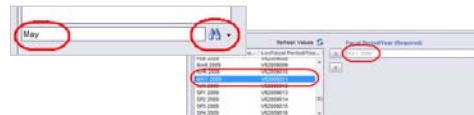
- There are three ways to search for a value:

- Use the scrollbar to find the value, and then double-click on the desired value;



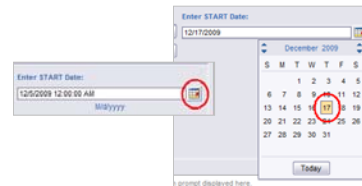
OR

- Use the search field to search for a value;



OR

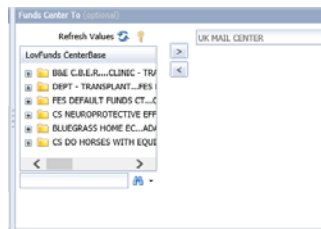
- (If the variable is a date)
Click on the calendar icon and select a date.



Prompt Window



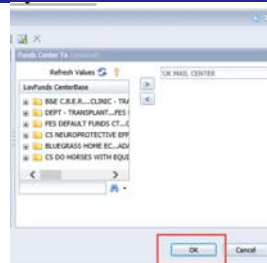
- Note:** If the value list is large, the list may be broken down into several groups. Expand the group for more detail or select a different group



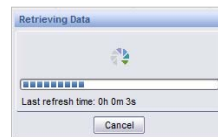
Prompt Window



- Click OK to Run Query



- A system message will display.



- A new refresh message will display.



Unit 2

Check for Understanding



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Tracking Changes

Unit 3 – Tracking Changes



- Types of Data Change
- Set Baseline Report
- Display Data Changes
- Change Tracking Options
- Hide Data Tracking

Types of Data Changes



- Tracking can be used to monitor performance or identify important changes.
- It can help to make informed and effective business decisions.
- Tracking data allows for timely action.
- You can track the following changes in your report:
 - Added or removed data,
 - Modified data,
 - Increased or decreased data values.



Tracking Changes



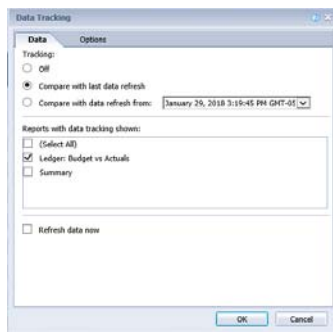
- Use the following steps to turn on data tracking:
 - Click **Design**
 - **Select Analysis**
 - **Select Data Tracking**
 - **Click Track**



Set Reference Data



- Select Tracking: Compare with last data refresh
- **Note:** The current data becomes the fixed reference data and remains the reference data after further data refreshes.
- ♦ Click OK to continue



Set Reference Data



- **Note:** After setting the reference data, you can click **Refresh data now** to refresh the data when you accept your settings.

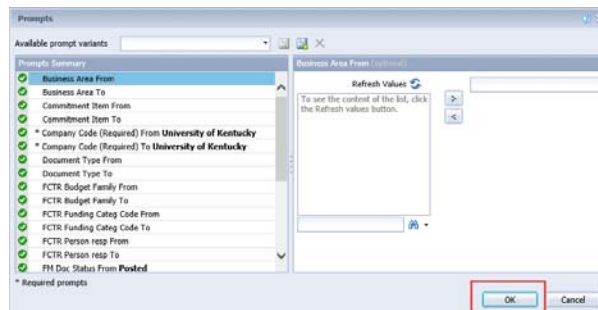


- To accept your settings and run the baseline report, click **OK**

Display Data Changes



- If you have chosen to refresh the data immediately and there are prompts set on your report, the **Prompt** window will display.
- Make any changes needed to the values, then click on **OK** to run the report.



Display Data Changes



- The data changes will be formatted according to defaulted tracking options.

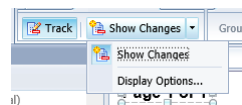
Ledger: Funds Center Balances - Budget vs. Actuals

Funds Center Key	Funds Center	Component Item Key	Component Item	Original Budget	Annual (Revised) Budget	Prior Budget	Current Month Actual	YTD Actual	YTD Fund Year Actuals, Regs	YTD Expenditures for PDs	YTD Budget FY Actuals	Available Budget
10100300	UNIVERSITY-GENERAL	402000	Fees - Bad Debt	(215,800,000.00)	(215,800,000.00)	(215,800,000.00)						
	UNIVERSITY-GENERAL	410000	Apprs-Register State	1,000,000.00	1,000,000.00	1,000,000.00	8,844.30	8,844.30	(171,435,432.69)		0.00	(1,391,644.47)
	UNIVERSITY-GENERAL	410200	Apprs-State Order Ser	(4,444,100.00)	(4,444,100.00)	(4,444,100.00)	0.00	0.00				0.00
	UNIVERSITY-GENERAL	410220	Apprs-State Special	0.00	0.00	0.00	0.00	0.00				0.00
	UNIVERSITY-GENERAL	410230	Tobacco Apprs	(145,000.00)	(145,000.00)	(145,000.00)	(290,000.00)	(290,000.00)			0.00	(290,000.00)
	UNIVERSITY-GENERAL	414000	Grants - 1st Revenue	(15,100,000.00)	(15,100,000.00)	(15,100,000.00)	0.00	0.00			0.00	0.00
	UNIVERSITY-GENERAL	427000	Capital Gifts	(145,000.00)	(145,000.00)	(145,000.00)			(145,000.00)		0.00	(145,000.00)
	UNIVERSITY-GENERAL	430000	Inv Inc - Chargegrs	(10,100,000.00)	(10,100,000.00)	(10,100,000.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	430040	Inv Inc-Broad Rcr	(2,300.00)	(2,300.00)	(2,300.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	430060	Inv Inc-Contributed	(8,200.00)	(8,200.00)	(8,200.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	431000	Endow Inc-Prd Inc	(2,300.00)	(2,300.00)	(2,300.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	431003	Endow Inc-XY Land Gr	(8,700.00)	(8,700.00)	(8,700.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	440000	Commodities - Other	(227,000.00)	(227,000.00)	(227,000.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	440010	Misc. services	0.00	0.00	0.00	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	440100	Handling & Inc Charges	(227,000.00)	(227,000.00)	(227,000.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	440200	Other Revenue	(227,000.00)	(227,000.00)	(227,000.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	440300	Reimbursed Costs	0.00	0.00	0.00	0.00	0.00			0.00	0.00
	UNIVERSITY-GENERAL	440400	Over and Short	0.00	0.00	0.00	0.00	0.00			0.00	0.00
	UNIVERSITY-GENERAL	440500	Other Inc - FY 40 and	0.00	0.00	0.00	0.00	0.00			0.00	0.00
	UNIVERSITY-GENERAL	440600	Apprs of Fund Bal	(77,702,400.00)	(77,702,400.00)	(77,702,400.00)	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	740000	Gr Inc UNK Operating	0.00	0.00	0.00	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	740100	Trans Inc UNK Admin	0.00	0.00	0.00	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	740130	Trans Inc UNK Unvers	0.00	0.00	0.00	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
	UNIVERSITY-GENERAL	740150	Trans Inc Inten Loan	0.00	0.00	0.00	(1,000,000.00)	(1,000,000.00)			0.00	(1,000,000.00)
10100300												

Hide Data Tracking



- Data tracking can be toggled on and off by clicking on **Show Changes/Display Options**



- Display Options allow you to control data tracking display on the report.



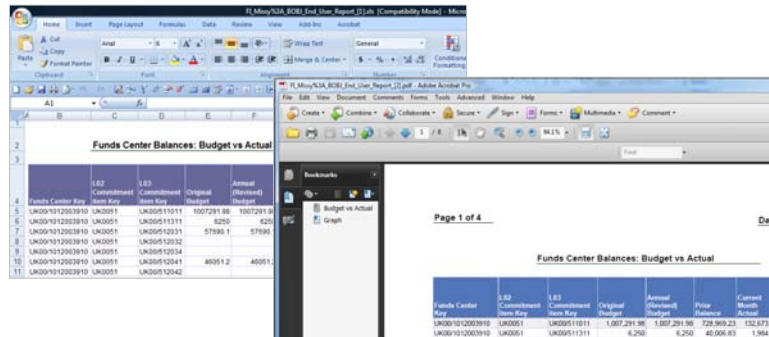
Unit 3

Check for Understanding

Unit 3 Summary

- Tracking can be used to monitor performance or identify important changes which can help to make informed and effective business decisions.
- Tracking data allows for timely action.
- Data changes that can be tracked include added data, removed data, modified data, and increased or decreased data values.

Unit 4



Exporting a Report

Unit 4 – Exporting a Report



- Export as an Excel Document
- Export as a PDF Document
- Export as a Text Document
- Export as a CSV Document
- Export as a CSV with Options Document

Exporting a Report



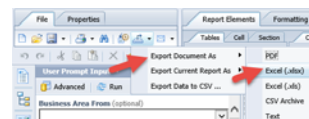
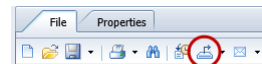
- Business Objects reports can be exported in five formats:
 - Microsoft Excel,
 - Adobe PDF (Portable Document Format),
 - Text
 - Microsoft Excel CSV (Comma-separated values),
 - Microsoft Excel CSV (Comma-separated values) with options.
- The exported report cannot be imported back into Business Objects.
 - **Note:** If changes are needed, you can make changes to the report, save it within BOBJ, and then export the report again.

Export As Excel Document



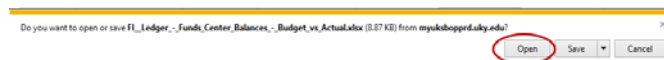
Use the following steps to export the report as an Excel document:

- Open the Business Objects report
- Click the **Export** icon
- Select **Export Document As**
- Select **Excel (.xlsx)**



When you receive this pop-up

- Select **Open** to continue





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Information Systems

- [illegible]



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Information System

-
- This screenshot shows the 'Export' menu in SAP BW. The menu is open, displaying options: 'Export Document As', 'Export Current Report As', and 'Export Data to CSV ...'. The 'Export Current Report As' option is selected, which has opened a sub-menu. In this sub-menu, the 'PDF' option is highlighted. Red arrows indicate the navigation path from the main 'Export' menu to the 'Export Current Report As' option and then to the 'PDF' option.

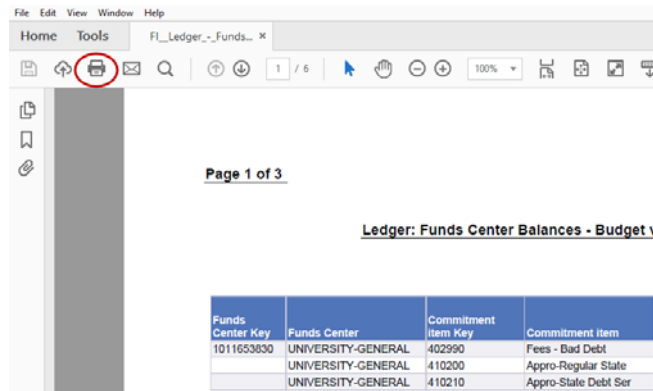
- Select Open to continue



Export As PDF Document



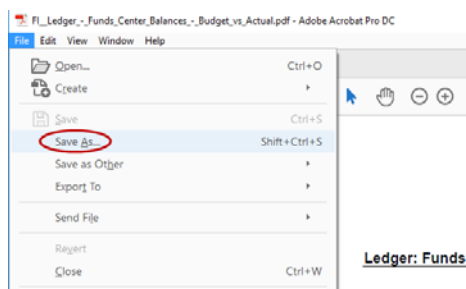
- (Optional) Click **Print** to print the document



Export As PDF Document



- Note:** To save the document as PDF, use the menu and click **File → Save As**.



Export As CSV Archive Document

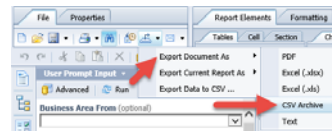


Use the following steps to export the report as a CSV (Comma Separated Value) document:

- Open the Business Objects report
- Click the **Export** icon



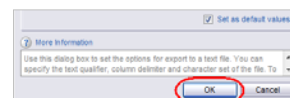
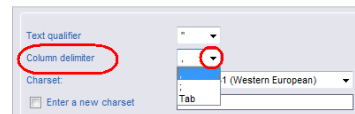
- Select **Export Document As**
- Select **CSV Archive**



Export As CSV with Options Document



- Use the drop down to select either a double quote or single quote as the **Text qualifier**
- Select a comma, a semi-colon, or a tab as the **Column delimiter**
- If you want to save the settings, click **Set as default values**
- Click **OK**





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- ds_Center_Balances_Budget_vs_Actual.zip (1.82 KB) from myukobopp@uky.edu?
- Open Save Save as Save and open

- [illegible]



- [illegible]

Export As Text

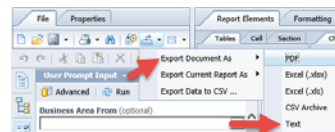


Use the following steps to export the report as a text document:

- Open the Business Objects report
- Click the **Export** icon



- Select **Export Document As**
- Select **Text**



Export As Text

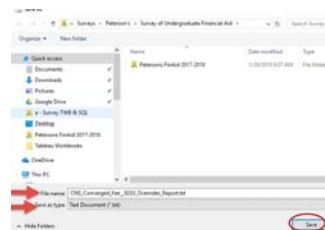


When the pop-up window appears

- Select **Save**
- Select **Save as**



- Navigate to where you want to save the document
- Keep or change the file name
- Keep the file type/extension (.txt)

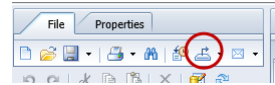


Export Data to CSV

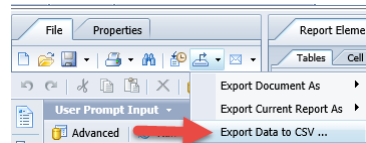


Use the following steps to export the report as a CSV document:

- Open the Business Objects report
- Click the **Export** icon



- Select **Export Data to CSV...**



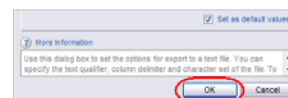
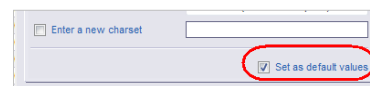
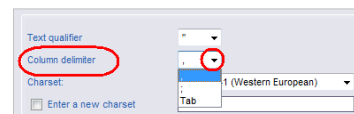
- Use the drop down to select either a double quote or single quote as the **Text qualifier**



Export As CSV with Options Document



- Select a comma, a semi-colon, or a tab as the **Column delimiter**
- If you want to save the settings, click **Set as default values**
- Click **OK**



When the pop-up window appears

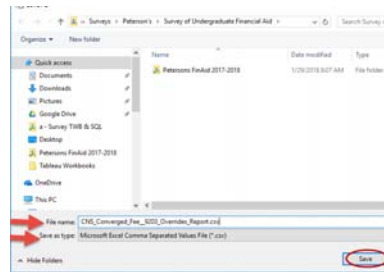
- Select **Save**
- Select **Save As**



Export As CSV with Options Document



- Select the folder where you want to save the file
- Keep or change the file name
- Keep the file type/extension (.csv)
- Select **Save** to continue



- **Note:** You will be able to open the file in Excel format or import it into other software as needed. CSV files also can be treated as text files.



Unit 4

Check for Understanding

Unit 4 Summary



- Several formats exist when exporting a report
- Business Objects reports can be exported as Excel, PDF, CSV/CSV Archive and Text (txt) documents

Unit 5



The screenshot shows an Excel spreadsheet with the following data:

	LSZ	LS3	Original	Amend	Price	Current	YTD	YTD	
	Account	Account	Budget	(Revised)	Balance	Month	Actual	Actual	
4	Funds Center Key	Funds Key							
5	UN001012003910	UN0001	1007291.86	1007291.86	22099.22	12/07/12	811642.26		
6	UN001012003910	UN0001	6250	6250	40006.83	1/08/12	41980.85		
7	UN001012003910	UN0001	57999.1	57999.1	20744.43	4/02/12	30838.74		
8	UN001012003910	UN0001			7799.39		304.67		
9	UN001012003910	UN0001			431.2	4/24	473.54		
10	UN001012003910	UN0001	40051.2	40051.2	21420.45	3/21	24741.45		
11	UN001012003910	UN0001			5003.63	2/7/12	1077.43		

Saving a Report

Unit 5 – Saving a Report



- BOBJ Naming Standards
- Saving a Report
- Creating a Shortcut

BOBJ Naming Standards



- If changes are made to a report and the report will be re-run many times, it is recommended the report be saved to your **Favorites folder** along with the changes you have made.
- The BOBJ naming standards should be followed to ensure consistency for the Business Objects reports.

BOBJ Naming Standards

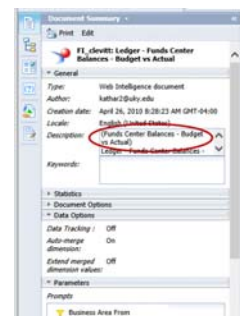


- The **Name** should consist of the following format:
 - **IRIS Module (Ex. FI, HR, SLCM, MM, etc.) or database (Remedy, ESI, CSN, etc.)**
 - The name of the folder where the report originated as well as the naming standard found in other reports in the folder can be clues on how to name this report.
 - **Underscore**
 - **User ID (your AD/MC/link blue ID)**
 - **Colon**
 - **Concise title for the report**
 - **Example:**
 - **FI_UserID22: Funds Center Balances – Budget vs Actual**

BOBJ Naming Standards



- The **Description** should consist of the following format:
 - A more in-depth description of the report,
 - This would be a good place to note the changes you made to the report,
 - Example: Filtered for my department (3J510) only
 - Example: Limited on Senior students or retiree employees, etc.
 - The **Universe** name within parentheses.
 - Example: (Funds Center Balances – Budget vs Actual)
 - **Note:** Since you are changing an existing report, the name of the Universe should appear in the description.
 - If the Universe name has not been entered, you can find the name by clicking on **Data Summary**.



BOBJ Naming Standards



- **Keywords** are optional, but can be helpful when searching for a particular report.
- Keywords can include:
 - The name of the unit
 - The name of a grant or PI
 - Project name
 - Specific words related to the report, such as budget, freshmen, etc.

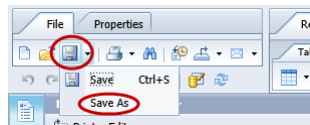
Using Save As



- You can use the **Save As** functionality for two purposes.
 - You have changed or personalized a report, and you want to save these changes.
 - You want to save the report to your **Favorites Folder** to make it easier to access in the future.

Use the following steps to save the report to your **Favorites Folder** in BOBJ:

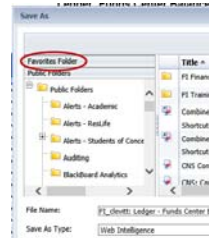
- Click on the **Save** icon
- Select **Save As**



Using Save As



- Click on **Favorites Folder**



- Enter the new name for the report in the **File Name** field
 - Important!** Use the Business Objects Naming Standards when saving your report.

File Name:

Using Save As



- Click the icon shown to expand the window for additional options



- Enter a short description of the report in the **Description** field
 - Note:** Remember to include the (Universe name) in the description!
- Enter **Keywords**, if desired

File Name:

Save As Type:

Description:

Keywords:

Assign Category:

☐ Personal Categories

☐ Corporate Categories

☐ Refresh on open

☐ Permanent regional formatting

Save Cancel

Using Save As



- **Note:** It is **HIGHLY** recommended to **not** select **Refresh on Open**!

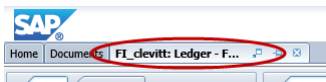
- Since you can choose to refresh your data at any time, this is an option you do not need to use.
- Choosing this option means that every time you open the report, the system will go out to the data source and pull in the data, even if the data has not changed, which will slow down the time it takes to open the report!

Using Save As



- Click **Save** to continue

- After saving, the new name will display in the report window header.



- The new report is the one now displaying on your screen.

Creating a Shortcut



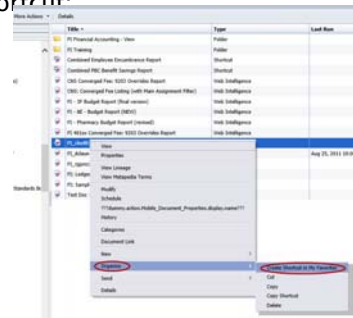
- If you have a specific report you want to run on a regular basis, you might want to create a shortcut in your **My Favorites** folder.
- By creating a shortcut, you will be able to see any changes made to the report by the original creator of the report.
- Use the following steps to create a shortcut:
 - Right-click on the report in the

Document List

- Select **Organize**

- Select **Create Shortcut in**

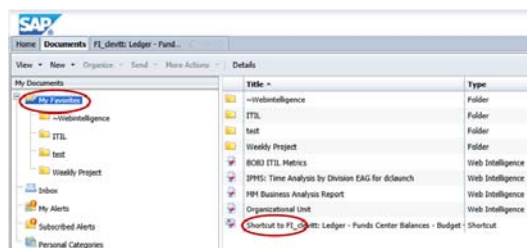
My Favorites



Creating a Shortcut



- Navigate to your My Favorites folder to see the Shortcut you have added





Unit 5

Check for Understanding

Unit 5 Summary

- The **Save As** functionality is used to save changes you have made to a report and to save the report to your **My Favorites** folder to make it easier to access in the future.
- Creating a shortcut to a report will allow you to run the report and see any changes made by the owner of the report.
- BOBJ Naming Standards ensure consistency for the Business Objects reports.

Exiting Business Objects

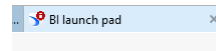


Use the following steps to exit a report and Business Objects:

- Click on the **Log off** button



- Click on the **x** to close the window



- To return to the main **myUK** tab, click on the **Launch Pad** tab



Help Websites



- myHelp** website:
 - <http://myHelp.uky.edu/rwd/HTML/BW.html>
 - Contains Quick Reference Cards (QRCs), updated course manuals, BW Frequently Asked Questions, and other job aids
- IRIS** website
 - <http://www.uky.edu/IRIS/BW/>
 - Contains Documentation, Assistance & Support, and other references
- For questions or assistance contact:
 - analytics@uky.edu
- Other Business Objects Courses
 - BI_BOBJ_300 Business Objects for Power Users
 - BI_BOBJ_301 Business Objects Lab for Power Users

Course Completion Instructions



- You can provide IRIS Training with feedback on this course by completing the [BI_BOBJ_200 Business Objects for End Users](#) course evaluation.
- Click on the button below to open the evaluation in a new window.