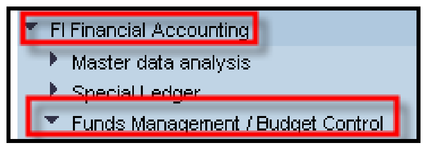
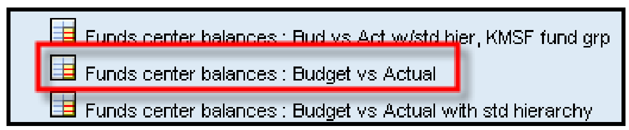
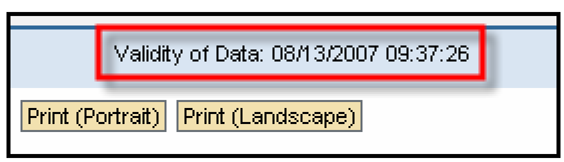
Quick Reference Card - Basic

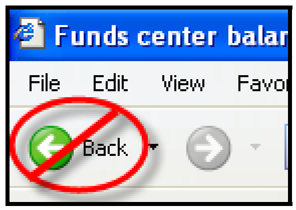
BW Designing Report Layouts

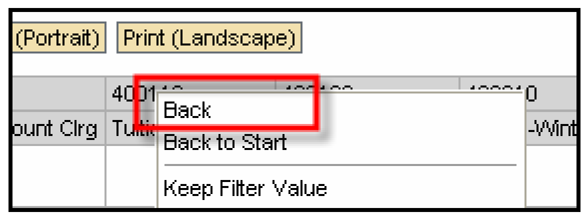
Process: Business Warehouse reports can be modified to meet the specific needs of the users. The following steps will show you how you can design your report layout to analyze the data. The techniques described may be used on any BW report. See related Quick Reference Cards (QRCs) for more information: **BW Reports – Entering Variables**, **BW Using Context Menus**, **BW Saving A View**, **BW Opening A Saved View**, and QRCs covering the details of various reports.	
Role: Authorized Users	**Frequency:** When needed

BEGINNING STEPS	
After logging into the myUK portal, click on the **BW Web Reporting** icon.	
BW REPORT (WELCOME SCREEN)	
Click on the triangle next to the report group and any subsequent groups to get to the reports.	
Click on the name of the report, ***not*** the icon to the left of it.	
VARIABLES (REPORT PARAMETER SCREEN)	
Enter the variables you wish to use for the report along with any required variables.	
When you have set all the variables, click on the **Execute** button.	
DATA ANALYSIS TAB	
The **Validity of Data** date will display at the top of the screen. It shows the last time the data was updated in BW. ***Tip:*** If this date is not current (within the past 48 hours), click on your browser's **Refresh** button to refresh the data generated by the query. If it still is not current, the BW Team is aware of the problem and is correcting it	 

MOVING BACKWARDS A STEP

While designing the layout of your report, you may need to step backward or return to the original view of the report. **DO NOT** use the **Back** icon at the top of your web browser to step backward.



To step back one step: Right-click on any column heading. Select **Back**.	
To step back to the original layout of the report: Right-click on any column heading. Select **Back to Start**. **CAUTION:** Any modifications you have made will be lost.	

ROWS, COLUMNS, & FREE CHARACTERISTICS (left side of screen)

Rows section	Specifies fields shown in rows in the view of the report.
Columns section	Specifies fields shown in columns in the view of the report.

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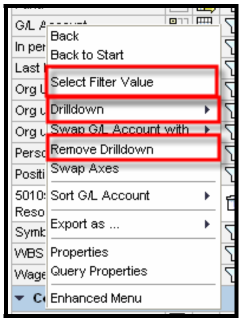
Free Characteristics section	Fields that are not shown in the initial view, but are available if you want to use them as a column, row, or filter in your view of the report. **Free Characteristics** are non-amount values or values that describe what a key figure represents and are usually displayed in rows.
Key Figures	Dollar amounts or units; typically displayed in columns.
Structure	Data elements that are grouped together because they are closely related or dependent on each other. Choosing a **Structure** will provide all of the associated fields in that **Structure**.
DATA ANALYSIS FEATURES	
Drill-Down 	To display a field's data in rows, click on the **Drill-down** icon in the first column of settings for the field (found under Free Characteristics).
Drill-Down Off 	To turn off the drill-down, click on the **Collapse** icon in the first column of the settings for the field (found under Rows).
Drill-Across 	To display a field's data in columns, click on the **Drill-across** icon in the second column of settings for the field. **Caution:** Depending on the data, there may be too many values to display in columns. If there are too many, turn off **Drill-Across** or right-click on the column heading and choose **Back**.
Drill-Across Off 	To turn off the drill-across, click on the **Collapse** icon in the second column of settings for the field (found under Columns).
Filters 	Use filters to narrow your view to very specific data; the selected filter value(s) will be listed on the Report's side panel under the filtered item.

Filter Off

To turn off the filter, click on the **Delete** icon in the settings.

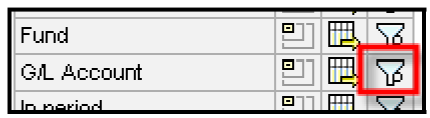
Context Menus



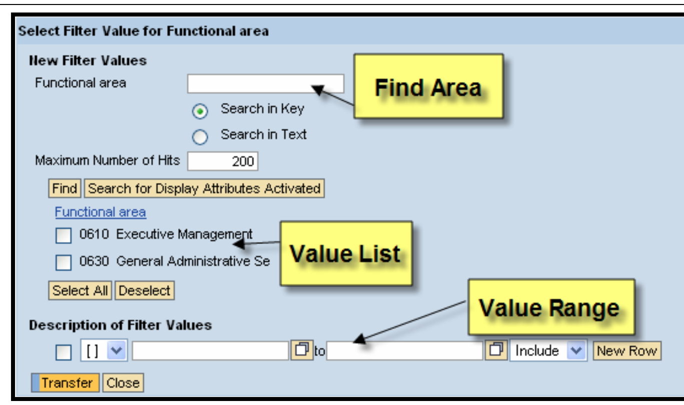
You also can use a **Context Menu** to turn features of drill-down, drill-across, and filtering on and off; right-click on the field name to access the menu.

USING FILTERS

Click on the **Filter** icon to the right of the field name in the settings area.



The **Select Filter Value** window will display.

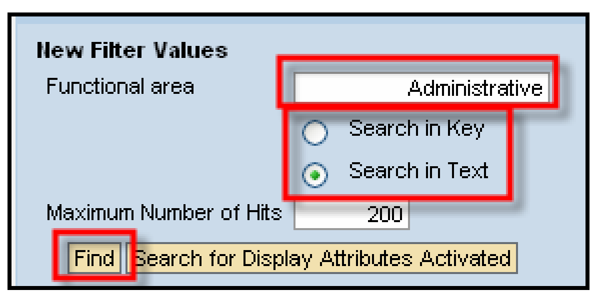


To choose a filter:

Find Area – Can be used when the value list is long.

Enter the value or partial value preceded or followed by a wildcard (*) (key or text) in the **Find** field, select **Search in Key** or **Search in Text**, click on the **Find** button.

Reminder: The **Find** field is CASE SENSITIVE.



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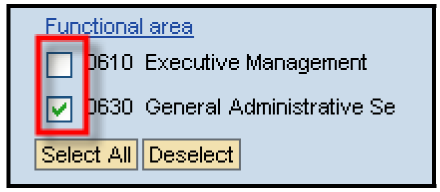
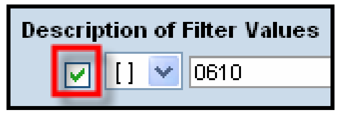
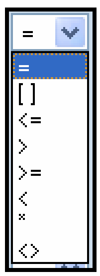
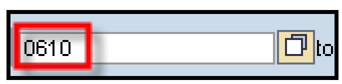
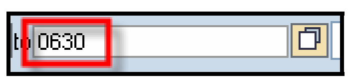
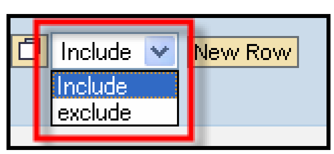
OR, find the value in the **Value List** and click in the checkbox to the left of the value. ***Tip:*** You can select more than one value at a time.	
To enter a range of values:	
Click in the **Description of Filter Values** checkbox.	
Select an **Operator** 	<u>Symbol</u> <u>Meaning</u> = Equal to [ ] Range (From/To) < = Less than OR Equal to > Greater than > = Greater than OR Equal to < Less than * Wildcard < > Not equal to
If a range [ ] operator is selected:	
Enter the beginning value in the **From** field.	
Enter the ending value in the **To** field.	
You can insert a new row of values by clicking on the **New Row** button.	
Select whether to **Include** or **Exclude** the new row. The new row can have a different operator.	

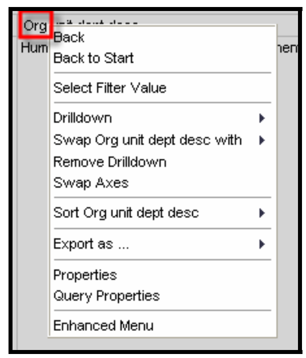
After making your selections, click on the **Transfer** button to transfer the filters to the report.

The view of the report will change to show only data for the value you specified.

CONTEXT MENUS

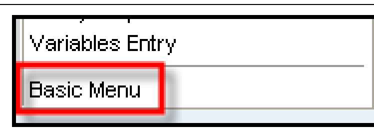
The **Context Menus** offer more options for analyzing report data; the menus vary slightly depending on the cell or header you select; most menus contain both a basic and enhanced menu; see the QRC **BW Using Context Menus** for more details.

To access a **Context Menu**, right-click on the desired field.



To change from a **Basic Menu** to an **Enhanced Menu**, click on **Enhanced Menu**.

To change back from an **Enhanced Menu** to a **Basic Menu**, click on **Basic Menu**.



EXCEPTIONS

Exceptions allow you to color-code cells that meet specified criteria; Example, you can use an exception to alert you that a dollar figure has exceeded a certain amount.

To view an existing **Exception**:

Click on the **Exceptions and Conditions** button.

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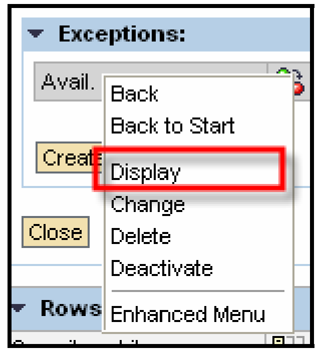
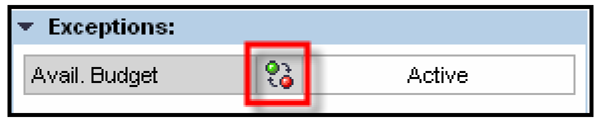
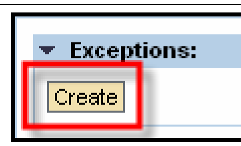
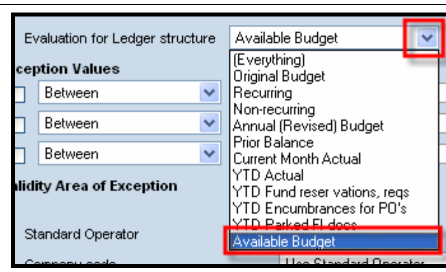
To view an **Exception**, right-click on the **Exception** name and select **Display**.	
Turn the **Exception** on or off by clicking on the **Activate/Deactivate Toggle** button under the **Exceptions** heading.	
To create an **Exception**:	
Click on the **Exceptions and Conditions** button.	
Under the **Exceptions** heading, click on the **Create** button.	
When the **Define Exception** window displays, enter a brief, but recognizable **Description** for the Exception.	
In the **Evaluation for Ledger Structure** field, click on the **Drop-down List** icon and select the field value for which the **Exception** is to be applied (and color-coded).	
Under **Exception Values**, you must click on the first box preceding each row to checkmark/activate that row's values.	

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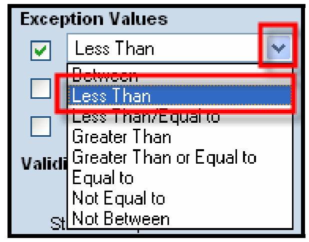
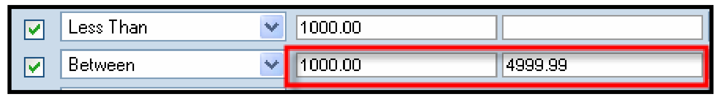
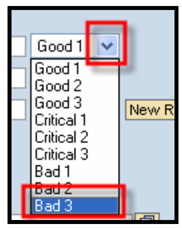
In the next box, click the **Drop-down** button to select the **Operator** or function to be used for evaluating field values or amounts.



Fill in the next field(s) with the number(s) that fits the comparison, e.g., Greater Than 100, Between 50 and 100, etc.



Select the **Severity** (indicated by varying degrees of color-codes).



Severity is indicated by varying degrees of color-codes in the report.

Good-shades of green.

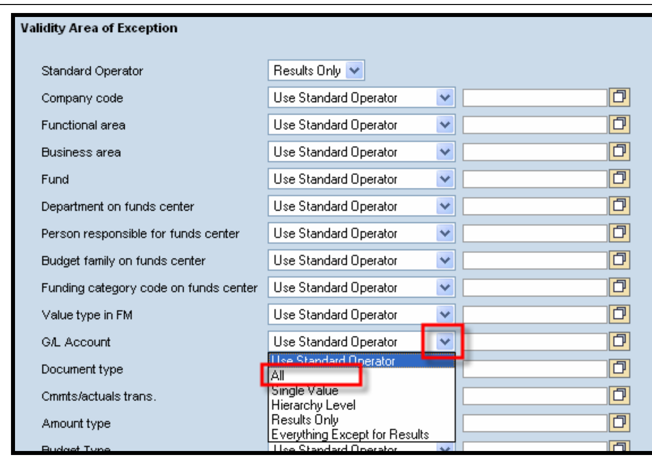
Critical–shades of yellow/orange.

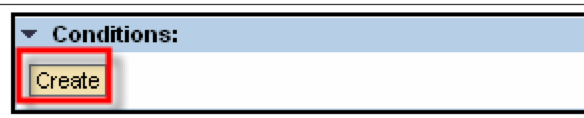
Bad–shades of red.

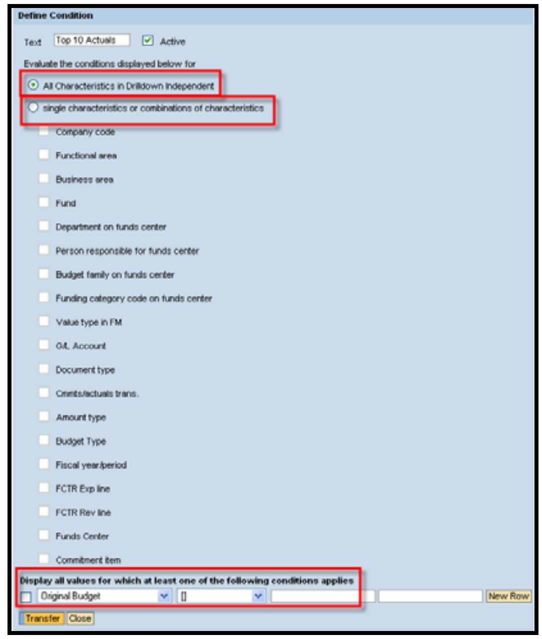
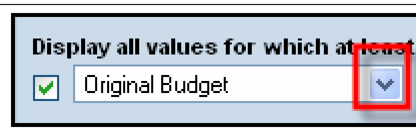
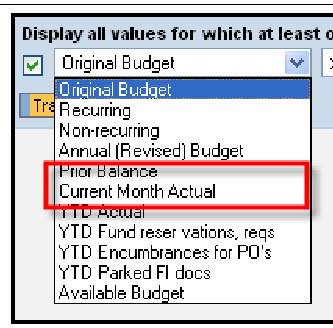
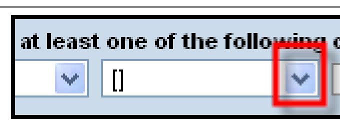
Good 1	Good 2	Good 3
Critical 1	Critical 2	Critical 3
Bad 1	Bad 2	Bad 3

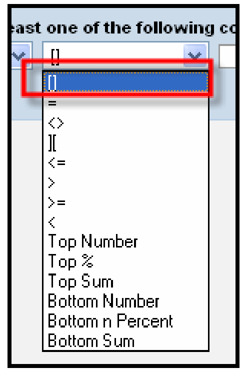
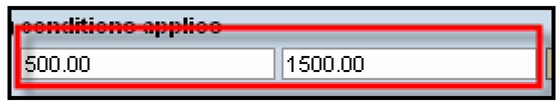
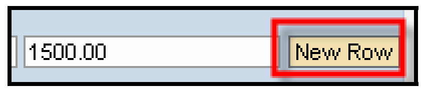
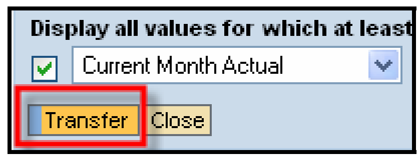
The system provides three rows for **Exception Values**, and more rows can be added by clicking **New Row** button.

You can change various **Validity Areas of Exception** by using the drop-down menus to the right of the validity area or changing the **Standard Operator**.



Click the **Transfer** button and double-check for accuracy based on the colors for values.	
To keep your **Exceptions**, click on the **Save View** button, and save your view of the report or they will be discarded when you exit. See QRC **BW Saving a View** for more details.	
CONDITIONS	
Conditions provide a way to change a report so that only the data that meets certain criteria, defined by the user, is selected and displayed.	
To create a **Conditions**:	
Click on the **Exceptions and Conditions** button.	
Under the **Conditions** heading, click on the **Create** button.	
When the **Define Conditions** window appears, enter a name for the **Condition** in the **Text** field, such as **Top 10 Actuals**.	

Choose the condition by clicking in the radio button before one of the following: **All Characteristics in Drilldown Independent**, **Single Characteristics or combinations of characteristics**, or **Display all values for which at least one of the following conditions applies** If you choose either **Single Characteristics or combinations of characteristics**, or **Display all values for which at least one of the following conditions applies**, you will need to provide additional specifics for the **Condition**.	
In this example, under **Display all values for which at least one of the following conditions applies**, click in the first box to insert a checkmark.	
In the first field, click the **Drop-down List** icon.	
Select the **Condition**.	
In the next field, click the **Drop-down List** icon.	

Select the appropriate **Condition** value.	
In the third field, enter the appropriate number.	
If needed, click on the **New Row** button to add another row.	
Click on the **Transfer** button.	
To keep your **Conditions**, save your view of the report or they will be discarded when you exit.	

NOTES

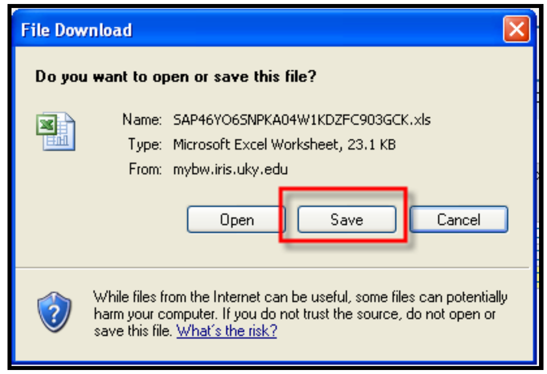
Notes are documentation (comments) that users can create which are specific to the initial query. They are useful for relaying information about the query. **CAUTION!** Notes can be seen and changed by anyone with access to the role and query. If you save a **View** and have added Notes to your view, you also have added those Notes to the query in the role.

EXPORTING

You can export (send) your report to an Excel spreadsheet or a CSV (comma-delimited) file. This is handy if you want to use the data in Access, Crystal, or Brio. ***Suggestion:*** Export large reports to CSV, since Excel has a limit of around 65,000 lines.

To export to Excel:	
Click on the **Export to Excel** button.	

When the **File Download** box appears, click on the **Save** button.



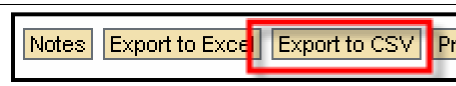
Select where you want to save the file using the **Save in** field.

Enter a name for your report in the **File Name:** field.

Click on the **Save** button.

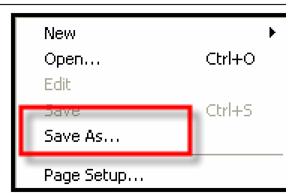
To export to **CSV**:

Click on the **Export to CSV** button.

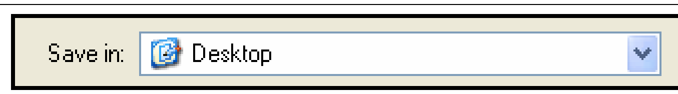


When the file appears, click on **File** in the browser menu.

Click on **Save As.**

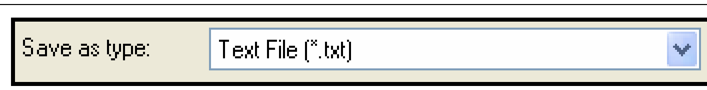


Select where you want to save the file using the **Save in** field.

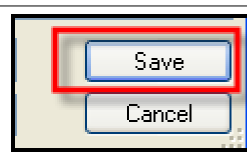


Enter a name for your report in the **File Name:** field.

Change **Save as Type:** to Text File (*.txt)



Click on the **Save** button.



DISPLAY DATA IN GRAPH OR CHART

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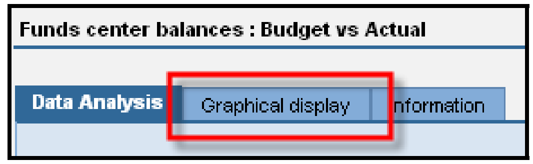
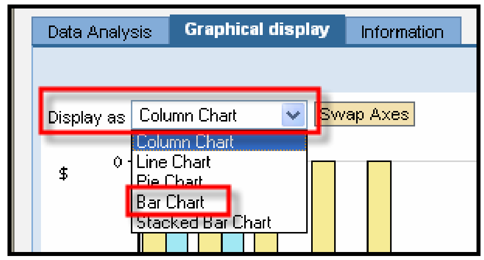
The **Graphical Display** tab helps you put your data in the form of a chart or graph.

Click on the **Graphical Display** tab.



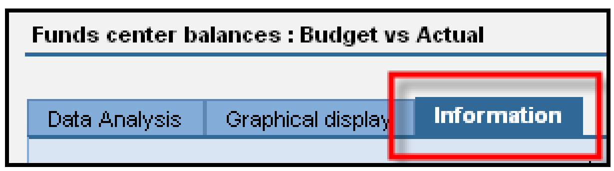
In the **Display As** field, select the type of chart or graph you wish to display.

The graphs cannot be saved or exported. If graphs are needed, it is best to use the graph functions available in Excel.

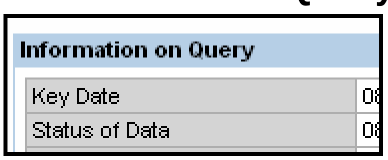


INFORMATION TAB

The **Information** tab displays the following information about the view of the data on the **Data Analysis** tab.



Information on Query

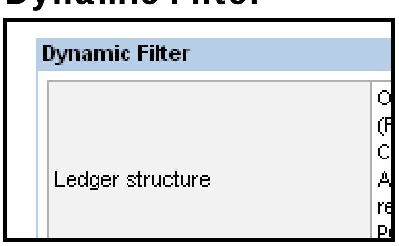


Displays the status of data which is the same date and time shown in the **Validity of Data** field, the **Query Description**, and the **Query Technical Name**

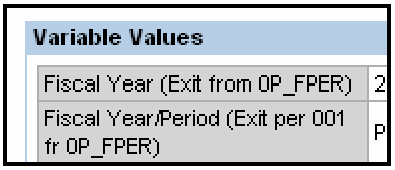
Static Filter

Displays filters which were applied to the query when it was initially developed; some of these may be displayed on the **Variable for Ad Hoc Report** screen and allow you to select a value(s); other filters are in the background and cannot be changed by you

Dynamic Filter



Displays filters which are applied on the **Data Analysis** tab of the query report view

Variable Values 	Displays the variables available in the **Variable for Ad Hoc Report** screen; the values you selected are listed for those parameters (variables) you chose to complete, as well as the values entered for required variables.