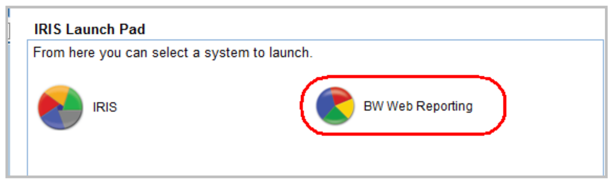
BW Report – Entering Variables

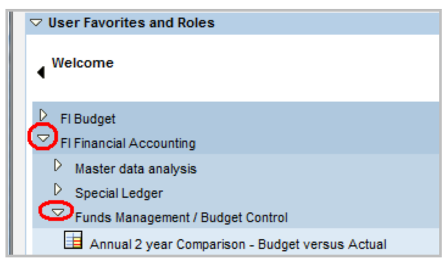
Process: Business Warehouse reports available on the menu can be modified to meet the specific needs of the users. The following steps will show you how to select the variables to pull up the needed data. For this Quick Reference Card, the **Funds Center Balances: Budget vs Actual** report will be used. The techniques described may be used on any BW report. See related QRCs for more information: **BW Designing Report Layouts**, **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

Entering BW Web Reporting

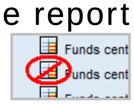
After logging into the myUK portal, click on the **BW Web Reporting** icon

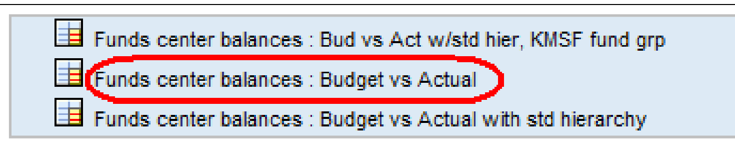


Click on the triangle next to the report group and any subsequent groups to get to the reports



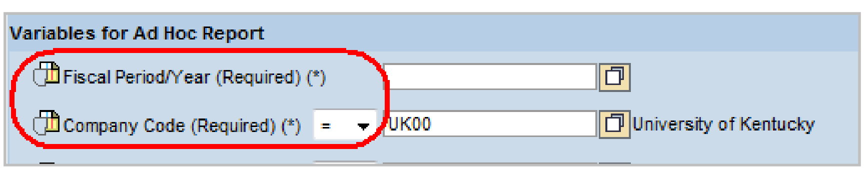
Click on the name of the report, ***not*** the icon to the left of it





Entering Variables (Report Parameter Screen)

IMPORTANT! Variable names followed by an asterisk (*) or (Required) **MUST** be completed!



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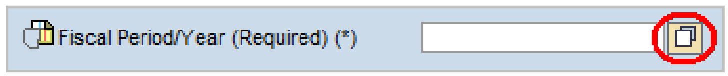
Enter the data directly into the appropriate field, such as 007/2007 for January 2007

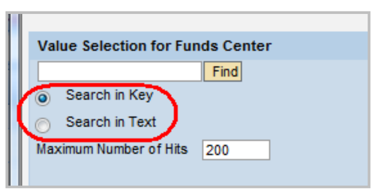
OR, click on the **Selection** button to the right of the field to display a list of valid values from which to choose



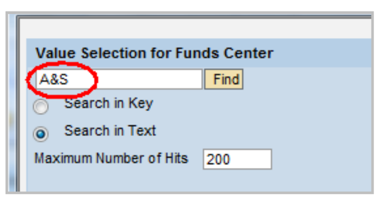
Tip: Click on the **Selection** button if unsure of the format if entering the data directly. For date/time fields, the slash / is not required, for example, type in 0072007.

OR, use the **Find** field to search for the value

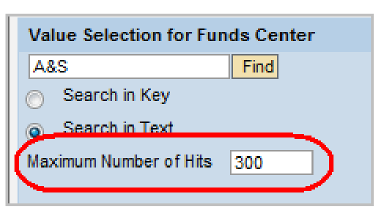
When searching you can choose to search for either the key or the text.



Enter the value, or a part of the value, then click on the **Find** button.



The **Maximum Number of Hits** may need to be changed if doing a partial search.



TIP: This field is CASE SENSITIVE!!

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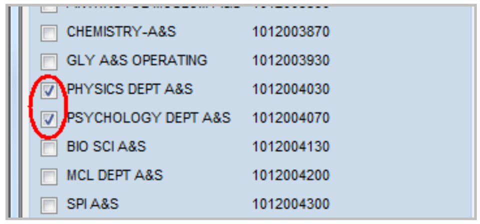
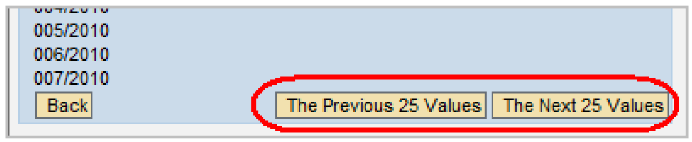
When you locate your value(s), click in the **Selection** checkbox to the left of the value(s)

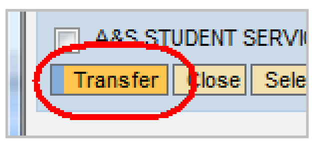
Tip: Multiple selections may be checked



If using the **Selection** button, the **Value Selection** box will display; you can search the list by clicking **The Next 25 Values** button to display more choices

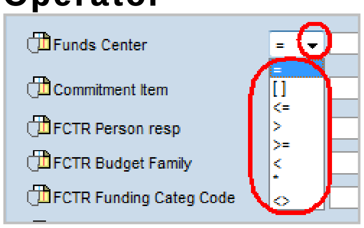


When your selections are complete, click on the **Transfer** button



Using Operators

Operator



Use the operator located to the left of the variable field to specify selection conditions for that variable

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

Choose the appropriate operator

Symbol	Meaning
=	Equal to
[ ]	Range (From/To)
<=	Less than OR Equal to
>	Greater than
>=	Greater than OR Equal to
<	Less than
*	Wildcard
<>	Not equal to

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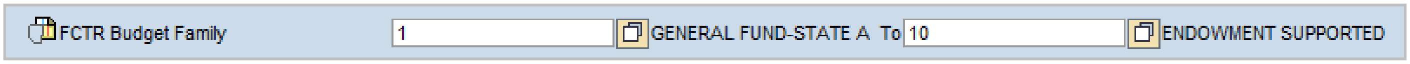
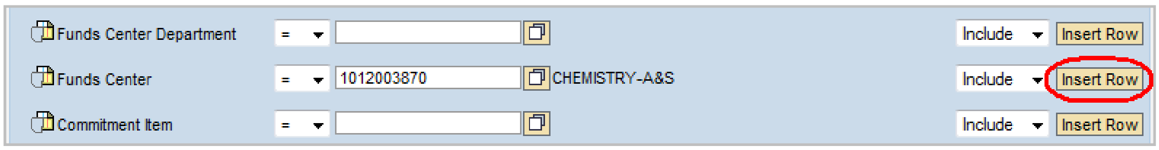
Using Ranges

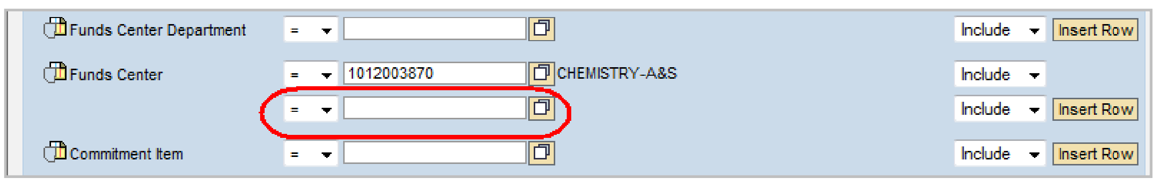
Some fields will allow a range selection with a **From** and a **To** field with a **Selection** button for each.



Inserting a Row

When the variable field does not allow for a range selection, you can use the **Insert Row** button to add another row to include or exclude another value in the query.

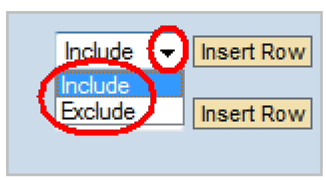




Using Include or Exclude

Some variables allow you to **Include** or **Exclude** certain values when using the field to the far right of the variable.

Examples: Funds Center; Grant; GL Account; WBS Element

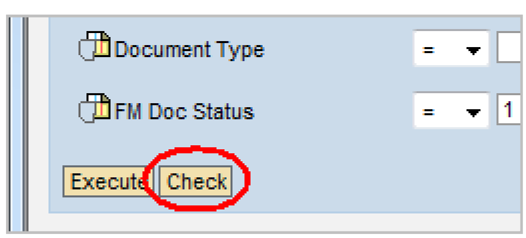


Checking Variables

If you entered values in any of the variable boxes, without using the **Selection** button, you should check the format of your data entry, such as spacing, special characters, etc.

Click on the **Check** button.

Tip: Using the **Check** button does not check the validity of the data, only the format of the way it has been entered.



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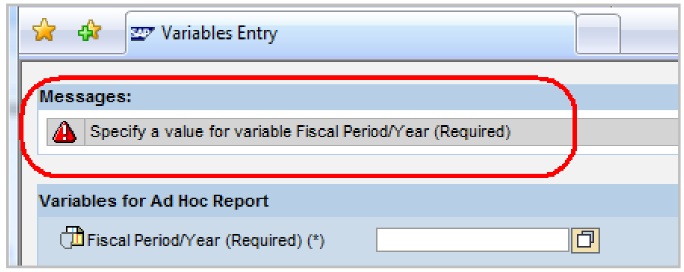
If you have not entered a required variable or have entered a variable using the wrong format, the system will display a system message letting you know what the problem is.

The message will display at the top of the screen.

If you do receive a message, you will need to fix the problem, and then click on the **Check** button again.

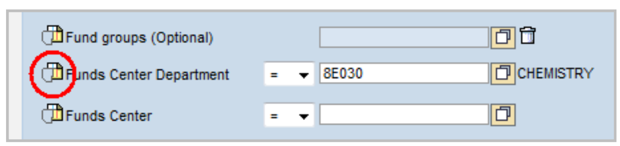


Setting Personalization

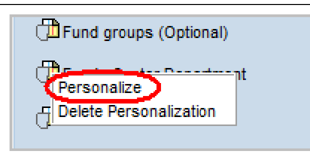
You can set personalization on a variable. If you find you are using the same criteria for a variable again and again, across multiple queries, setting personalization will automatically complete the criteria for every query using that variable.

To turn on Personalization:

After entering the value or values you wish to personalize, right-click on the **Personalization** icon next to the field name



On the menu that appears, select **Personalize**



The screen will flicker and the field will disappear. You have given the system a default value to use for the field automatically, and you will not have to enter this value each time.

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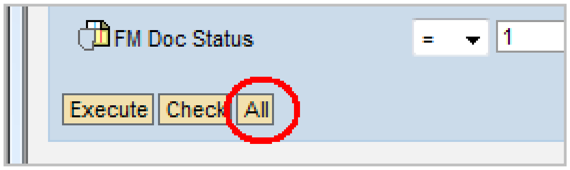
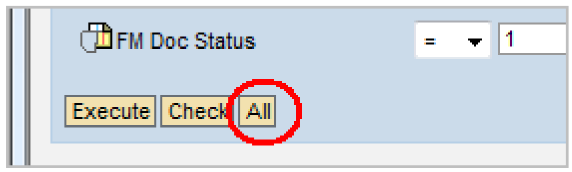
Reminder: Since personalization is an automatic way of setting a variable and does affect the reporting results, you need to remember which variables you have personalized. If you are getting unexpected results, you may need to check for personalization. To do this, see if the **All** button is displayed next to the **Check** button. If so, you have personalization set on one or more variables.



To check for hidden Personalized variables, click on the **All** button to the right of the **Check** button

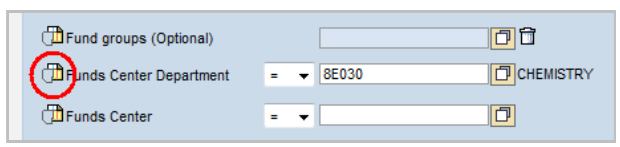


To re-hide the personalized variable(s), click on the **Free** button to the right of the **Check** button

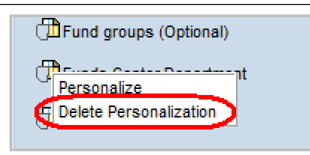
To turn off Personalization:

Right-click the **Personalization** icon to the left of the field name

Tip: Please note the change in the **Personalization** icon when it has been personalized



On the menu that appears, select **Delete Personalization**



Running the Report

When you have set all the variables, click on the **Execute** button to run the report.