

Process: Business Warehouse reports can be modified to meet the specific needs of the users. The following steps will show you how you can create and use conditions to design a very specific report. The techniques described may be used on any BW report. See related BW Web Reporting Quick Reference Cards (QRCs) for more information: **Entering Variables**, **Using Context Menus**, **Saving A View**, **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	IRIS Launch Pad From here you can select a system to launch. IRIS IRIS BW Web Reporting
Click on the triangle next to the report group and any subsequent groups to get to the reports	✓ User Favorites and Roles ✓ Welcome ✓ FI Budget ✓ FI Financial Accounting ▷ Master data analysis ▷ Special Ledger ✓ Funds Management / Budget Control ☑ Annual 2 year Comparison - Budget versus Actual
Click on the name of the report, not the icon to the left of it	Funds center balances : Bud vs Act w/std hier, KMSF fund grp Funds center balances : Budget vs Actual Funds center balances : Budget vs Actual with std hierarchy
Entering Variables	
Note: For details on entering variables, Card on <i>myHelp</i> .	see the Entering Variables Quick Reference
Enter any required variables	Variables for Ad Hoc Report Fiscal Period/Year (Required) (*) Company Code (Required) (*) = UK00 UK00
Enter any optional variables	Fund groups (Optional) Funds Center Department Kenter Department K
	□ Document Type = ▼ □ □ FM Doc Status = ▼ 1

Execute Check

Click Execute

Using Exceptions

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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 existing Exception: Data Analysis Graphical display Information Click Exceptions and Conditions Save View Variable Scree Exceptions and Conditions Available Buog Back Back to Start Right-click Exception name and Create Display select **Display** Change Close Delete Deactivate Rows Enhanced Menu Turn **Exception** on or off by clicking Activate/Deactivate 23 Available Budget Active Toggle To create an **Exception**: Data Analysis Graphical display Information Click Exceptions and Conditions Save View Variable Scree Exceptions and Condition Click Create Create Define Exception Enter brief, but recognizable Description Available Budget Description $\overline{\mathbf{O}}$ Evaluation for Ledger structure (Everything) Exception Values Original Budget Recurring Between Select field value for which the Recuming
 Annual (Revised) Budget
 Prior Balance
 Current Month Actual
 YTD Actual Between **Exception** is to be applied (and Between color-coded) Validity Area of Exception YTD Fund reser vations, reqs YTD Encumbrances for PO's YTD Parked El docs Validity Area for All Characteristi Available Budget Exception Values Click in first box preceding each Between row to activate that row's values •



Select Operator to be used for evaluating field values or amounts	Exception Values Between Eess Than Called Greater Than or Equal to Requal to Not Equal to Not Equal to Not Beduen Validity Area for All collarace	enstic	
Enter the number(s) that fits the comparison, e.g., Greater Than 100, Between 50 and 100, etc.	Exception Values	√ 1000.00	
Select Severity	Good 1 Good 1 Good 2 Critical 1 Critical 3 Bad 1 Bad 2 Bad 3		
Severity - indicated by varying	Good 1	Good 2	Good 3
• Good-shades of green	Critical 1	Critical 2	Critical 3
 Critical-shades of yellow/orange Bad-shades of red 	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.	Critical 2 - Critical 3 -	V ROW	
Change Validity Areas of Exception by using the drop-down menus to the right of the validity area or changing the Standard Operator .	Validity Area of Exception Validity Area for All Characteristics Not Listed Company code Functional area Business area Fund Department on funds center Budget family on funds center Fund Outpartment on funds center Funding category code on funds center Value type in FM OCument type Commity average Budget Type Budget Type FCTR Rev line FCTR Rev line Payse name Document Status Payee vendor Payee vendor Funds Center Status Payee vendor Pares Commitment #em	ieuta Ony	

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Click the **Transfer** button and double-check for accuracy based on the colors for values.

To keep Exceptions, click Save View

See QRC **Saving a View** for more details.

Prime vendor	Standar
Funds Center	Standar
Commitment item	Standar
Transfer Close	
Save View Variable Screen	n [