

Saving Your View - When your view of the report looks the way you want to see it on a regular basis, you can save the settings by clicking on the **Save View** button (circled below).

IMPORTANT: Remember that saving a View saves your format and the values you selected or entered on the Variables screen. The next time you run the query, the data will be refreshed and you may have different results. However, your selections, format, layout, etc. will be saved. Your view will look the same, but the data will be more current.

UK UNIVERSITY OF KENTUCKY

UKY Budget Availability Report (SBX)

Data Analysis Graphical display Information

Validity of Data: 08/24/2005 16:24:10

Save View Variable Screen Exceptions and Conditions Notes Export to Excel Export to CSV

Functional area	Fund	G/L Account	Value type in FM	Budget		Overall R
				70	82	
011 General Acad Instruction	0011000100 Admin UK General	#	UK00/Not assigned			
		Result		\$ -114,670,900.00	\$ -114,670,900.00	\$ -114,670,900.00
	0011620100 PROVOST SELF SUPPO	550020	Library Books			
	Result					
0021700300 UK HAGGIN FUND	#	UK00/Not assigned		\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
	Result			\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
0110 General Acad Instruction	0011000100 Admin UK General	#	UK00/Not assigned	\$ -114,669,900.00	\$ -114,669,900.00	\$ -114,669,900.00
		130030	AR-Student			
		210110	GR/R			
		441010	Educational Supplies			
		512011	Executive - Regular			
		512013	Executive-Prem/Boun			
		512014	Executive- Overtime			
		520403	FICA-Exec/Managerial			
		520720	MFB - Staff			
		530021	Travel - Out of Stat			
		530120	Animal Care Services			
		530130	Consult Sponsor Pgms			
		530503	Training			
		535029	Parking			
		535110	Cash Discount Receiv			
				\$ 125,500.00	\$ 125,500.00	\$ 125,500.00

CAUTION: Views are shared. Everyone with access to this role can run your saved view, but they cannot change or overwrite it. Any changes they make will have to be saved as their own version with a new and unique Technical Name.

Save View – Description & Technical Name

When you click the **Save View** button, a small screen appears where you enter a **Description** and **Technical Name** for the view.

Save View

Description

Technical Name

Overwrite Existing View

Description:

Use the following format for your description: Enter your User ID, a colon, space, description

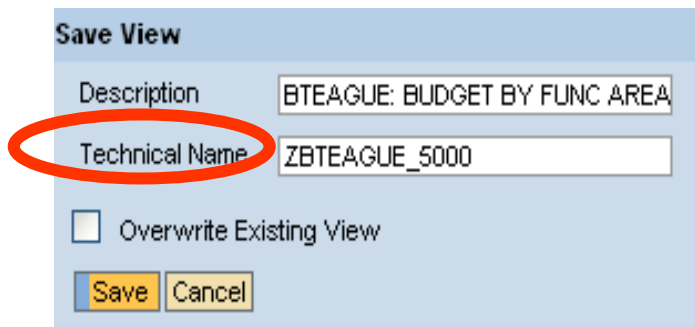
Example: USERID: Budget & Actuals by FYR by G/L
User ID Description

We also suggest using the words 'BY' and 'FOR' in your description to help you further identify the content of this particular report. For example: BUD/ACT BY FUND, FCTR FOR F/AREA 1000 - where BY indicates the drilled-down field, and FOR the filter. You can use up to 60 characters to make the description as recognizable as possible.

Technical Name:

Each Technical Name used must be **UNIQUE**. It can contain up to 30 characters. The naming convention for Views begins with 'Z', followed by your userid, followed by an underscore and **your** next available view number. 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.
Example: ZBTEAGUE_5000
5. Click the Save button to save your view.



The image shows a 'Save View' dialog box with two text input fields. The first field is labeled 'Description' and contains the text 'BTEAGUE: BUDGET BY FUNC AREA'. The second field is labeled 'Technical Name' and contains the text 'ZBTEAGUE_5000'. This second field is highlighted with a red oval. Below the fields is a checkbox labeled 'Overwrite Existing View' which is currently unchecked. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

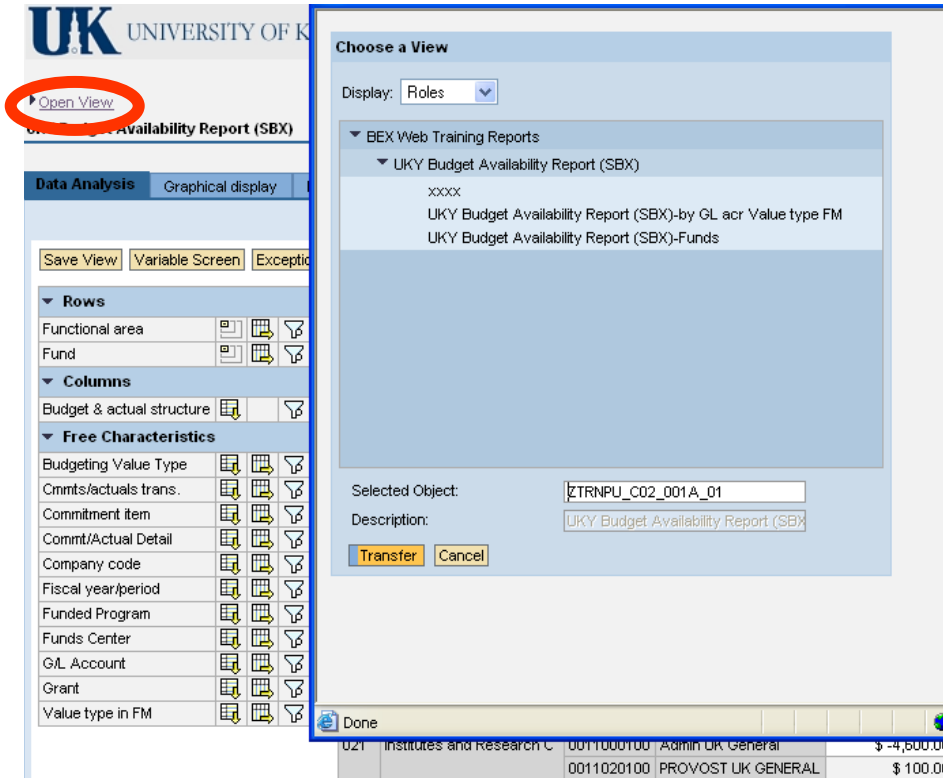
Use of the **Naming Standard** helps to identify the views that have been saved. It also quickly identifies the person who saved the view and makes it easier for each user to identify their next available view number.

Since technical names have to be unique in BW, you will need to keep track of your next view number.

How Do I Find a Saved View?

After saving your View, you will need to know how to locate it to use it again:

- Click the **Open View** link. The “Choose a View” window will open.



- The **Display** field may default to **History**, which lists Views you have recently saved or executed.
- You can check the listed views by moving your cursor slowly over each one – its technical name will appear; Or if you click on a View, the technical name will display in the **Selected Object:** field.
- Note the Views with technical names beginning with your User ID to help determine the next available number.

If you want to see **ALL** Views saved by everyone within the same access (**Role**) as yours:

- On the “Choose a View” window, click on the drop-down menu in the **Display** field and choose **Roles**.
- You can expand/open a Role to see the Views by clicking on the small black arrows.

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 close the “Choose a View” window without selecting a view, click the **Cancel** button.

Ctrl-F (Find)

As the list of views gets longer, you may have difficulty finding a particular view. You can use the "Find" feature (Ctrl-F) to quickly locate a view. After the views are displayed, enter a search string that BW can use to help find the view, e.g., your UserID. Then, click "Find Next".

Running a Saved View

1. Click on the view you want to run. This will populate the Selected Objects box with the Technical Name.
2. Click the Transfer button

Another way to run the saved view is to type the Technical Name, if known, directly into the Selected Objects box and then click the Transfer button.

Changing a Saved View

Once you save a view, no one can overwrite the saved view. Any changes to the layout, filters, drilldowns, parameters, etc. can be executed using the current view, but if you wish to save these changes, you will have to save them as a new view with a new Technical Name.

However, you **can** run an existing view, make changes, and then save it with a **new Technical Name**. This action creates a new view and leaves the original view unchanged.

Deleting Views

If you no longer need a view, send an email to the BW Team:

Analytics@uky.edu. Be sure to include the **Technical Name** of the view. Deleting views that are no longer needed will help keep unwanted views from cluttering the system. You can reuse the technical name after a view is deleted, so you should note the deletion in your spreadsheet.