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 BW 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.

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

**Note:** For details on entering variables, see the Entering Variables Quick Reference Card on myHelp.

Enter any required variables

Enter any optional variables

Click **Execute**
### Report Tips

**Last Data Update** date displays at top of screen  
**Note:** It will show the last time the data was updated in BW. If the data 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 and you have questions, contact BW at [BI-Requests@email.uky.edu](mailto:BI-Requests@email.uky.edu)

**CAUTION! 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.
### Using the Navigation Pane

<table>
<thead>
<tr>
<th><strong>Rows</strong></th>
<th>Specifies fields shown in rows in the view of the report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Columns</strong></td>
<td>Specifies fields shown in columns in the view of the report</td>
</tr>
<tr>
<td><strong>Free Characteristics</strong></td>
<td>Fields not shown in the initial view, but available if you want to use them as a column, row, or filter in your view of the report. Typically characteristic objects (non-amount values or values) that describe what a key figure represents and are usually displayed in rows.</td>
</tr>
<tr>
<td><strong>Key Figures</strong></td>
<td>Dollar amounts or units; typically displayed in columns</td>
</tr>
<tr>
<td><strong>Structure</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Drill-Down</strong></td>
<td>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).</td>
</tr>
</tbody>
</table>
### BW Report – Designing Report Layouts

<table>
<thead>
<tr>
<th>Feature</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Drill-Down Off</strong></td>
<td>- To turn off the drill-down, click on the Collapse icon in the first column of the settings for the field (found under Rows)</td>
</tr>
<tr>
<td><img src="image1" alt="Drill-Down Off" /></td>
<td></td>
</tr>
<tr>
<td><strong>Drill-Across</strong></td>
<td>- To display a field’s data in columns, click on the Drill-across icon in the second column of settings for the field</td>
</tr>
<tr>
<td><img src="image2" alt="Drill-Across" /></td>
<td><strong>Caution:</strong> 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.</td>
</tr>
<tr>
<td><strong>Drill-Across Off</strong></td>
<td>- To turn off the drill-across, click on the Collapse icon in the second column of settings for the field (found under Columns)</td>
</tr>
<tr>
<td><img src="image3" alt="Drill-Across Off" /></td>
<td></td>
</tr>
<tr>
<td><strong>Filters</strong></td>
<td>- Use filters to narrow your view to very specific data</td>
</tr>
<tr>
<td><img src="image4" alt="Filters" /></td>
<td>- Selected filter value(s) will be listed on the Report’s side panel under the filtered item</td>
</tr>
<tr>
<td><strong>Filter Off</strong></td>
<td>- To turn off the filter, click on the Delete icon in the settings</td>
</tr>
<tr>
<td><img src="image5" alt="Filter Off" /></td>
<td></td>
</tr>
<tr>
<td><strong>Context Menus</strong></td>
<td>- Can also use a Context Menu to turn features of drill-down, drill-across, and filtering on and off</td>
</tr>
<tr>
<td><img src="image6" alt="Context Menus" /></td>
<td>- Right-click on the field name to access the menu</td>
</tr>
</tbody>
</table>

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myHelp Website: http://myhelp.uky.edu/rwd/HTML/index.html
### Using Filters

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

<table>
<thead>
<tr>
<th>Free Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount type</td>
</tr>
<tr>
<td>Budget type</td>
</tr>
<tr>
<td>Budget funds</td>
</tr>
</tbody>
</table>

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

#### Find Area - use when the value list is long

Enter value or partial value

**Note:** The field is **CASE SENSITIVE**!

Select either **Search in Key** or **Search in Text**

Select maximum number of hits

Click **Find**

#### Value List Area – use when list of values is small

Click desired values
Can click **Select All**

If want to remove any selected values, click **Deselect**

**Filter Values Area** – use to enter a range of values

Click in **Description of Filter Values**

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal to</td>
</tr>
<tr>
<td>[ ]</td>
<td>Range (From/To)</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than OR Equal to</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than OR Equal to</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
</tr>
<tr>
<td>*</td>
<td>Wildcard</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Not equal to</td>
</tr>
</tbody>
</table>

Enter beginning value in **From**

**Note:** Use **Selection** to select the values, if needed.

Enter ending value in **To**

Click **New Row** to insert new row of values
Select **Include** or **Exclude** for the new row

**Note:** The new row can have a different operator.

Click **Transfer** to transfer filters to report

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

### Using 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 **Basic Menu** to **Enhanced Menu**, click **Enhanced Menu**

To change back from **Enhanced Menu** to **Basic Menu**, click **Basic Menu**
### Using 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 existing **Exception**:

1. Click **Exceptions and Conditions**

#### To create an **Exception**:

1. Click **Exceptions and Conditions**
2. Click **Create**
3. Enter brief, but recognizable **Description**
4. Select field value for which the **Exception** is to be applied (and color-coded)
5. Click in first box preceding each row to activate that row’s values
Select **Operator** to be used for evaluating field values or amounts.

Enter the number(s) that fits the comparison, e.g., Greater Than 100, Between 50 and 100, etc.

Select **Severity**

**Severity** - indicated by varying degrees of color-codes
- **Good** - shades of green
- **Critical** - shades of yellow/orange
- **Bad** - shades of red

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

Change **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 **Exceptions**, click **Save View**

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

**Using 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.

Click **Exceptions and Conditions**

Click **Create**

Enter name for **Condition in Text**, such as **Top 10 Actuals**.

Select either **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 **Single characteristics or combinations of characteristics** chosen, select desired characteristics

If **Display all values for which at least one of the following conditions applies** chosen, click in first box to insert checkmark

Select desired condition

Select appropriate condition value

Enter appropriate number or amount

If needed, click **New Row** to add another row
Click **Transfer**

To keep **Conditions**, click **Save View**

**Using 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 the Report**

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, especially if using Excel 2003.

To export to Excel:

1. Click on the **Export to Excel** button.
2. Click **Save**
3. Select desired folder
4. Enter name for report
**Quick Reference Card – Business Warehouse**

**BW Report – Designing Report Layouts**

<table>
<thead>
<tr>
<th><strong>Steps</strong></th>
<th><strong>Image</strong></th>
<th><strong>Instructions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>Save</strong></td>
<td><img src="image1.png" alt="Save button" /></td>
<td><strong>To export to CSV:</strong></td>
</tr>
<tr>
<td>Click <strong>Export to CSV</strong></td>
<td><img src="image2.png" alt="Export options" /></td>
<td><strong>To save, click File</strong></td>
</tr>
<tr>
<td>Click <strong>Save As</strong></td>
<td><img src="image3.png" alt="Save As dialog" /></td>
<td><strong>Select desired folder</strong></td>
</tr>
<tr>
<td>Enter name for report</td>
<td><img src="image4.png" alt="Save As dialog" /></td>
<td><strong>Note:</strong> <strong>Save as Type</strong> should default to Text file. If not, change to Text file (*.txt) as the extension.</td>
</tr>
<tr>
<td>Click <strong>Save</strong></td>
<td><img src="image5.png" alt="Save dialog" /></td>
<td></td>
</tr>
</tbody>
</table>

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**myHelp Website:**

http://myhelp.uky.edu/rwd/HTML/index.html
### Displaying Data in Graph or Chart

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

**Click Graphical Display**

Select type of chart or graph

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

### Using the Information Tab

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

#### Information on Query

<table>
<thead>
<tr>
<th>Key Date</th>
<th>02/09/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status of Data</td>
<td>02/09/2010 00:22:43</td>
</tr>
<tr>
<td>Changed At</td>
<td>02/09/2010 10:11:48</td>
</tr>
<tr>
<td>Last Changed By</td>
<td>DCLaunch</td>
</tr>
<tr>
<td>Last Refreshed</td>
<td>02/09/2010 08:03:32</td>
</tr>
<tr>
<td>Query Description</td>
<td>Funds center balances : Budget vs Actual</td>
</tr>
<tr>
<td>Query Technical Name</td>
<td>QZPU_C08_5A08</td>
</tr>
</tbody>
</table>

**Displays:**
- Key Date
- Status of Data (Last time data updated in BW)
- Changed At
- Last Changed By
- Last Refreshed
- Query Description
- Query Technical Name
### Static Filter

- Displays filters applied to query when initially developed.
- Some may be displayed on the **Variable for Ad Hoc Report** screen and allow you to select a value(s).
- Other filters may be in the background and cannot be changed by you.

### Dynamic Filter

- Displays filters applied on the **Data Analysis** tab of the query report view.

### Variable Values

- Displays 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.