BW Based Reports (cont.)

Using the Hierarchy Function

*Note:* The Hierarchy function is available on reports that have levels of subtotals displayed based on a hierarchy, like Org. unit or Commitment Item Group (G/L Account group). The function allows a user to expand the levels of the hierarchy versus opening each level with the triangle icons which can be time consuming. The function may also allow a hierarchy to be removed completely.

1. Right mouse click on a column heading or active field, and in the resulting window, click on or hover mouse over the **Hierarchy** option (not available on some reports).
2. To remove the hierarchy (if option available), click on the check mark beside the **Hierarchy Active** option and note the following:

- The check mark will be removed (toggles between check mark indicating active and no check mark indicating inactive with each mouse click on the Hierarchy Active option).
- The report hierarchy is no longer active and the levels of subtotals are now removed from the view.

3. Review the results with the hierarchy removed and note that the Hierarchy Active button is unchecked.

**Note:** Use the **Back One Navigation Step** or **Back to Start** options to undo the action if desired.
4. To expand or collapse the hierarchy (if hierarchy is active), right mouse click on the column heading, choose the Hierarchy option, click on the Expand Hierarchy and follow these steps:

- Review the levels displayed in the resulting pop-up box that indicate the levels of the hierarchy that are now displayed (for Org. Units this depends on the level of the Org. Unit in that organization and varies by Org. Unit selected).

- Click on a level to expand to that level (i.e. open the triangle icons – the higher the level chosen, the more granular the data will be on the report).

- Use the highest level displayed (the bottom of the list) to expand the hierarchy fully (all triangle icons are open/pointing down to display the most granular level of detail available).

5. Review the results with triangle icons expanded based on the level chosen.

Note: Use the Back One Navigation Step or Back to Start options to undo the action if desired.