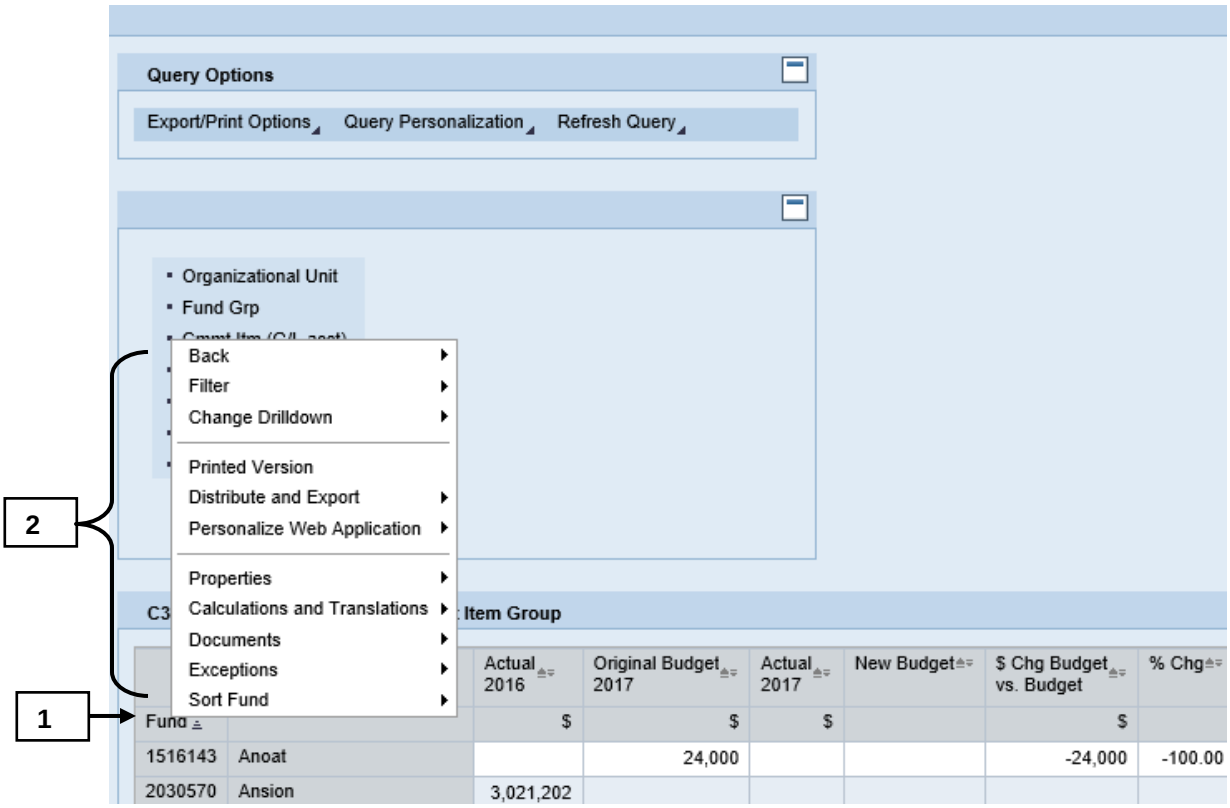
BW Based Reports (cont.)

Using Other Functions in SAP BW Based Reports

Once a report is executed, many of the other Business Warehouse functions are available in BPS for the SAP BW based reports. The Context Menu allows users to right mouse click in the report and to perform various functions. A few functions are outlined in this section. Refer to the Introduction to Business Warehouse Guide for even more functionality if desired.



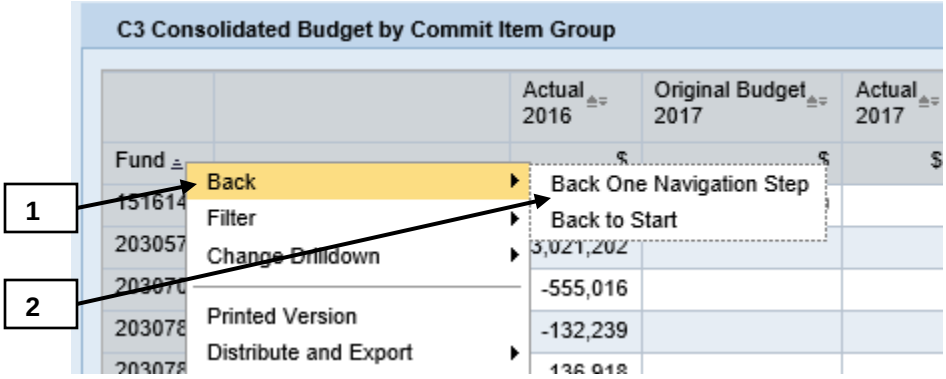
1. To access the functions, right mouse click directly on the column heading title desired, such as Fund in the example above (click on the word).

2. In the resulting window, choose one of the options outlined in the next few steps (**options vary depending on report selected**).

Note: *The Change Drill-down option contains the "swap with" and "drill-down" functionality already outlined in this Guide as drag-and-drop functionality. This option is just another way to do the same thing, so the steps are not covered again in this section.*

BW Based Reports (cont.)

Using the Back Function

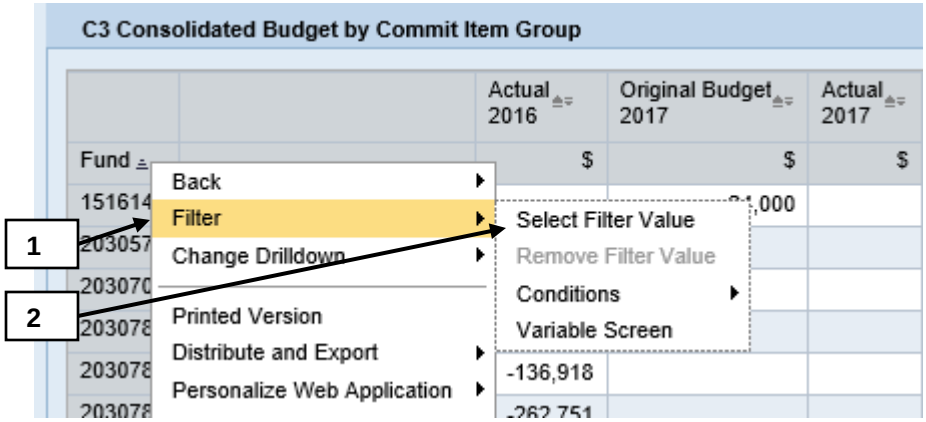


1. Right mouse click on a column heading or active field, and in the resulting window, click on the **Back** option.

2. Click on one of the following options:
   - **Back One Navigation Step** – to undo the last function performed or go back to the previous view of the report.
   - **Back to Start** – to return to the original view of the report when it was first executed.

BW Based Reports (cont.)

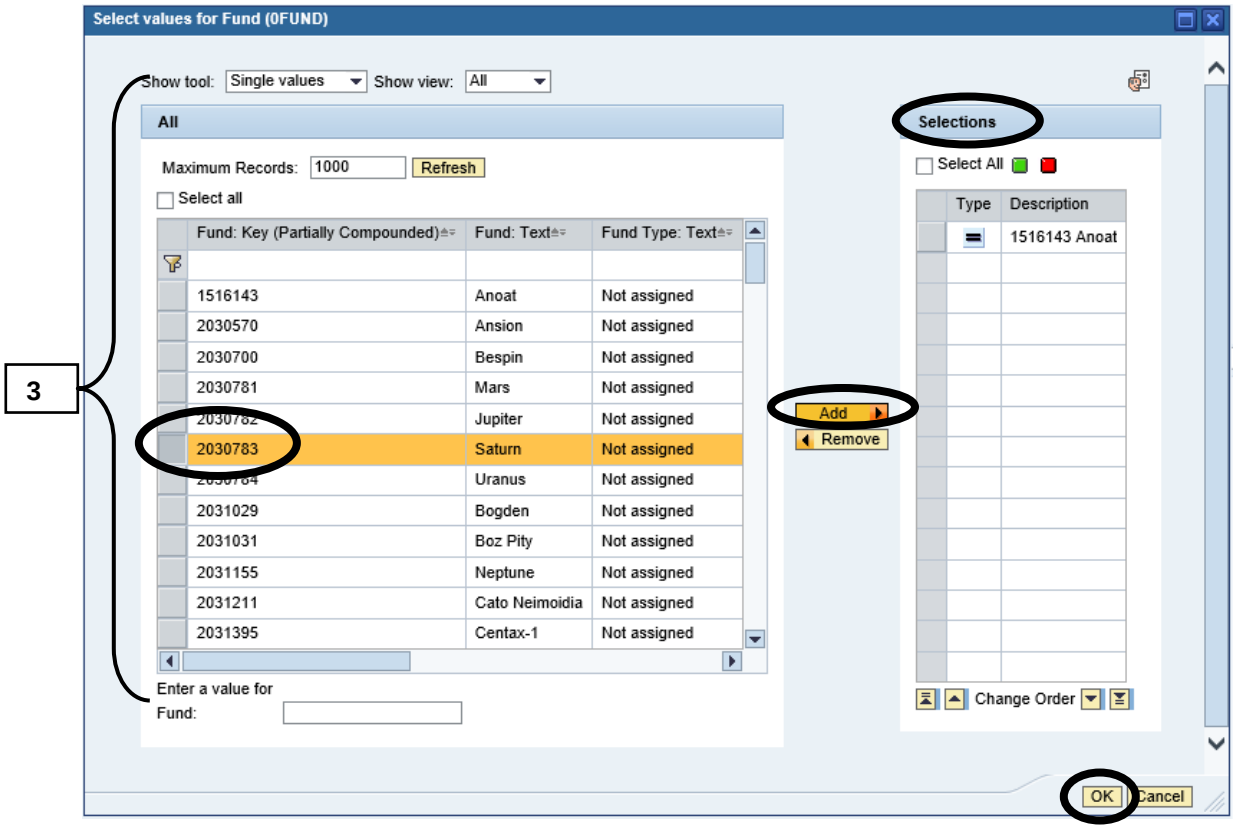
Using the Filter Function



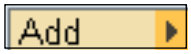
1. Right mouse click on a column heading or active field, and in the resulting window, click on the **Filter** option.

2. Click on the **Select Filter Value** option.

BW Based Reports (cont.)



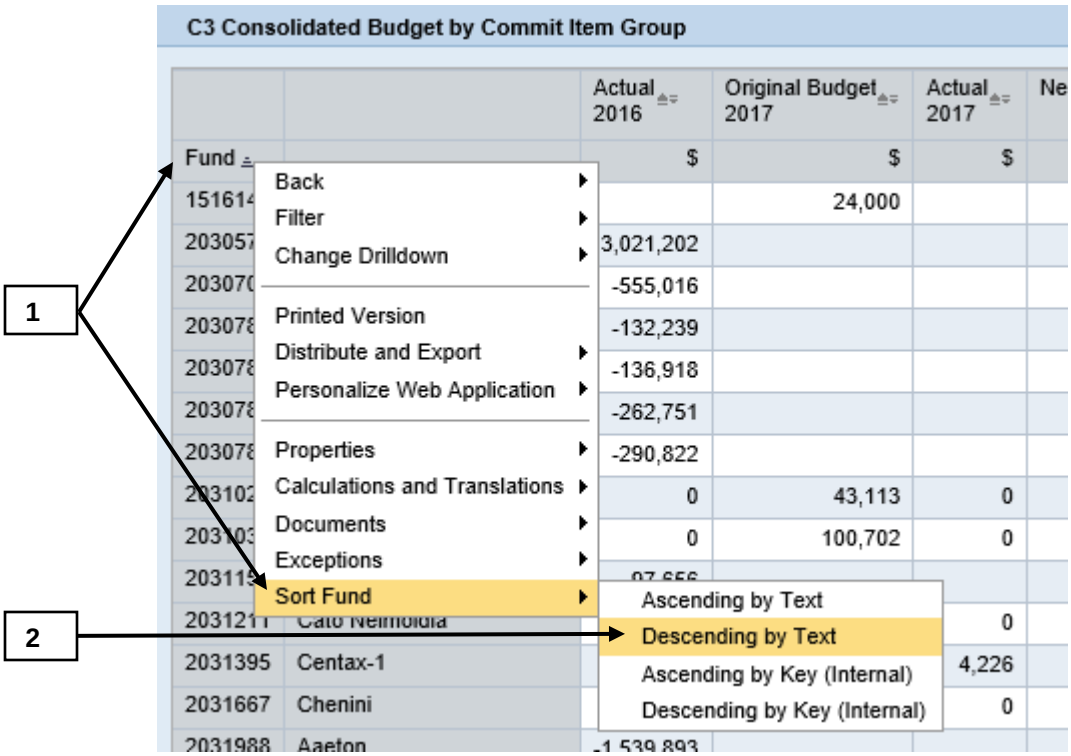
3. In the *Select values for*… window (**name varies by column selected for the filter**):

   - Click on the **box to the left of a value** under the ***All*** section to select that as the **desired filter value** (more than one may be selected).
   - Click on the  **Add** button to add the value as a filter selection under the ***Selections*** section on the right side of the screen**.**
   - To remove a filter, click on the **box to the left of a value** under the ***Selections*** section and click on the  **Remove** button.
   - When all values for the filter are selected, click on the **OK** button.

Note: *Use the **Back One Navigation Step** or **Back to Start** options to undo the action if desired or repeat steps above to remove the filters.*

Reporting (cont.)

Using the Sort Function



1. Right mouse click on a column heading or active field, and in the resulting window, click on the **Sort**… option (name varies by type of report and column chosen; in this example Sort Fund is shown).

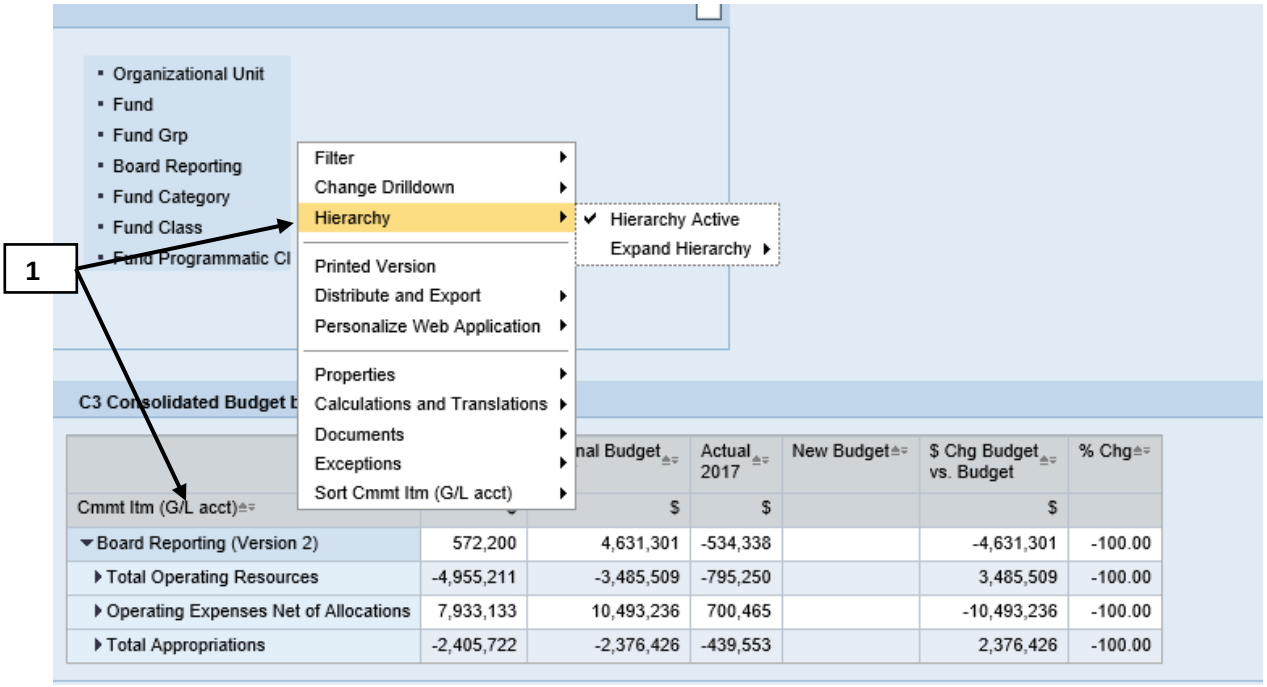
2. Click on one of the following options for the sort (may vary by column chosen) as follows:
   - **Ascending by Text** – A to Z by the text / description field.
   - **Descending by Text** – Z to A by the text / description field.
   - **Ascending by Key (Internal)** – Lowest to highest by number.
   - **Descending by Key (Internal)** – Highest to lowest by number.

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

BW Based Reports (cont.)

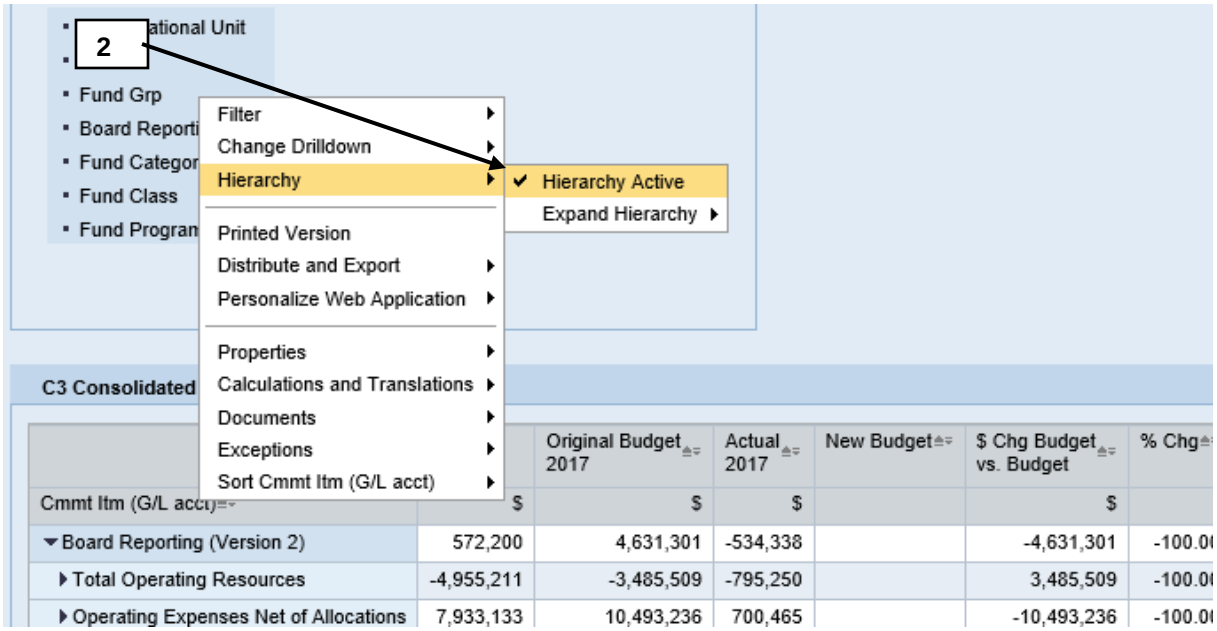
Using the Hierarchy Function

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****.*

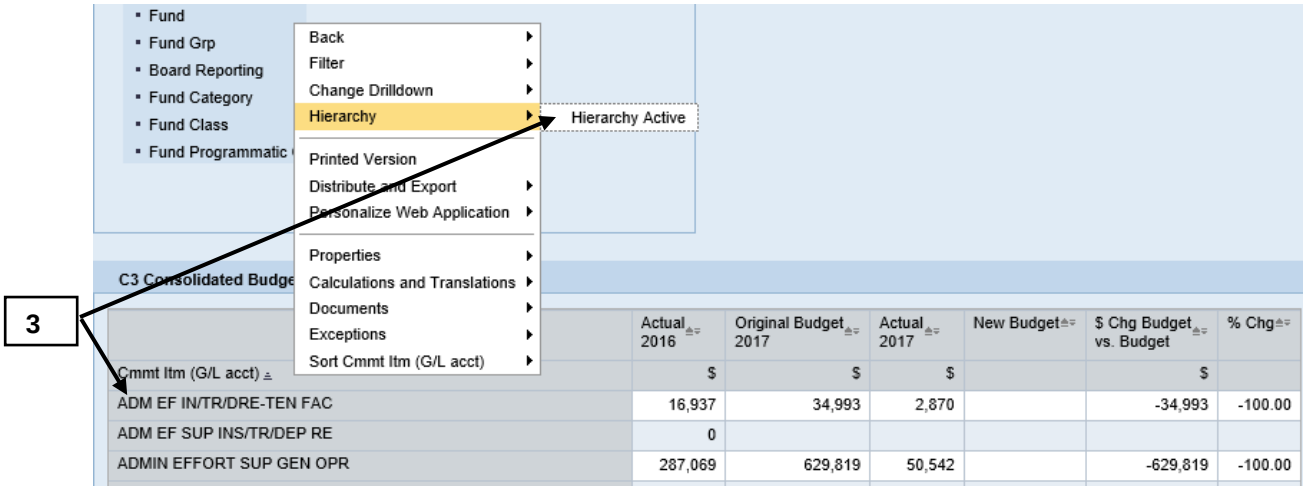


1. Right mouse click on a column heading or active field, and in the resulting window, click on or hover mouse over the **Hierarchy** option (not available on some reports).

BW Based Reports (cont.)



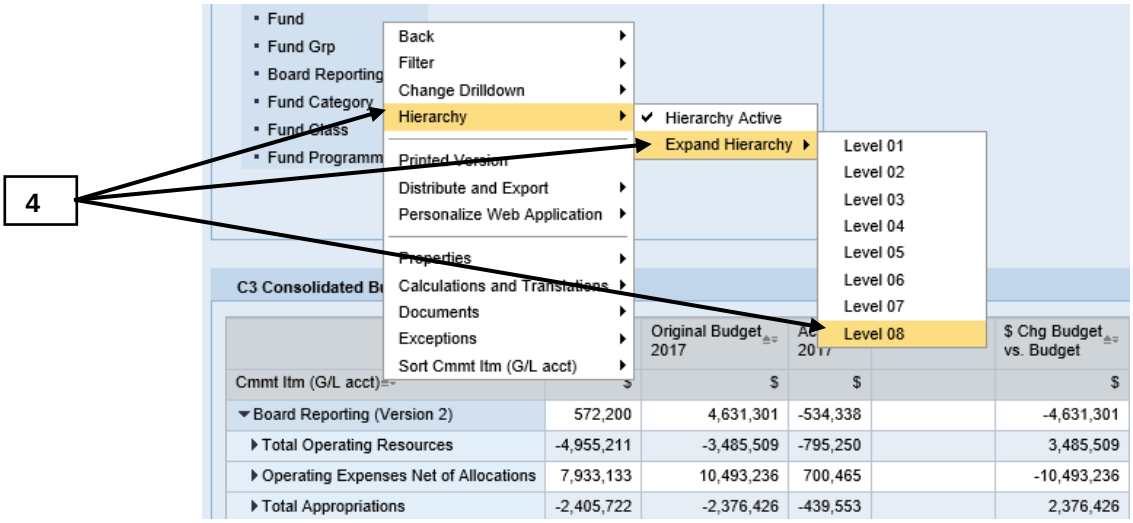
2. To remove the hierarchy (if option available), click on the check mark beside the **Hierarchy Active** option and note the following:
   - The check mark will be removed (toggles between check mark indicating active and no check mark indicating inactive with each mouse click on the Hierarchy Active 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.

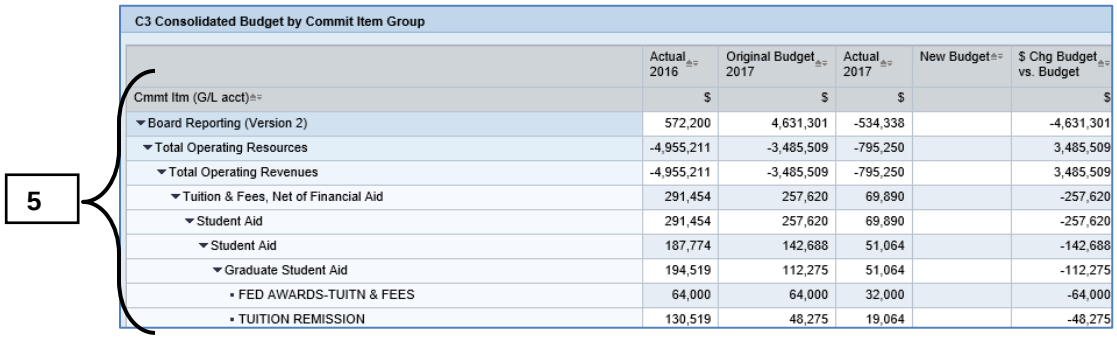
*Note: Use the **Back One Navigation Step** or **Back to Start** options to undo the action if desired.*

BW Based Reports (cont.)



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).



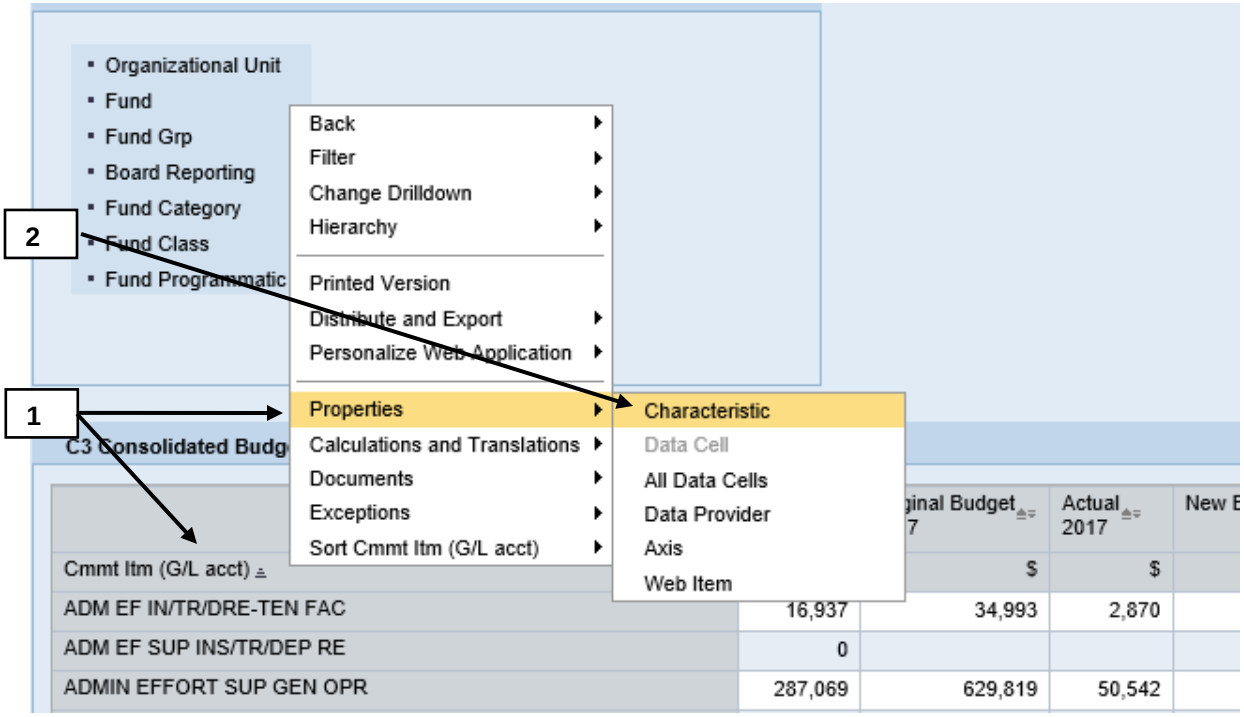
5. Review the results with triangle icons expanded based on the level chosen.

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

BW Based Reports (cont.)

Displaying Columns for Additional Information (Numbers, Names, etc.)

Note: When changing the view of a report using other options outlined in this section of the guide, you may wish to also add and display the name (text) or number (key) associated with a column of data. For instance if the name of the Commitment Item (G/L Account) is displayed and you'd like to also see a number associated with the G/L Account, use these steps to select and add the column. Names associated with this function will vary by type of report and column chosen.

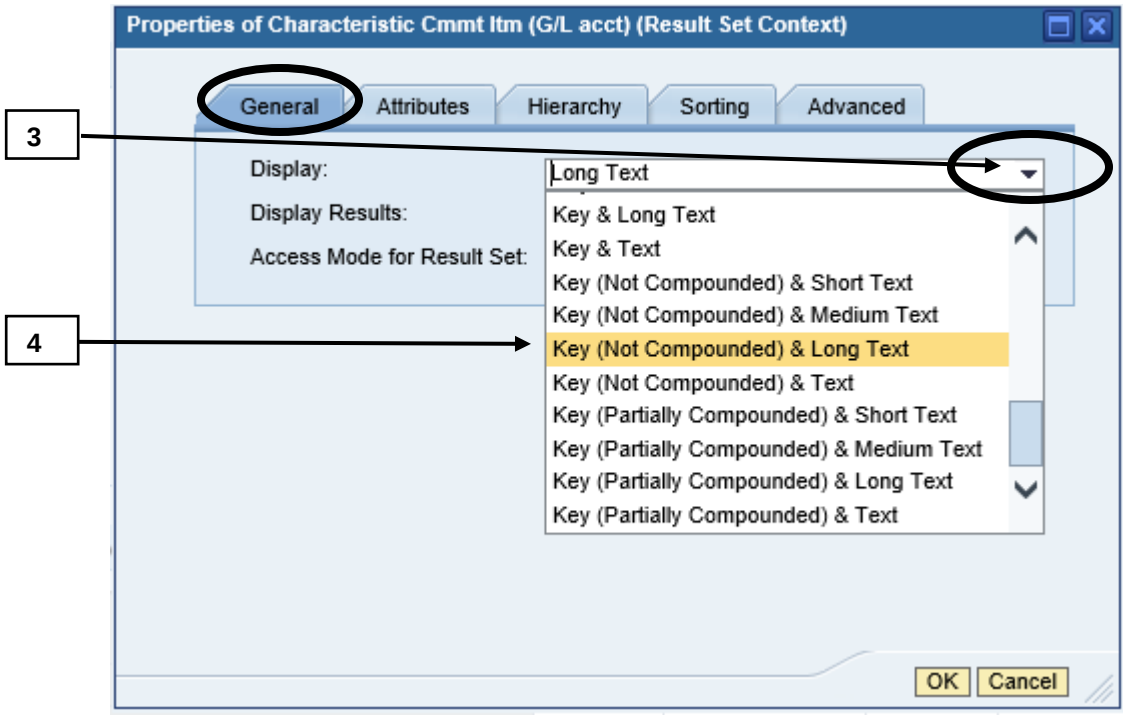


Note: In this example, the type of report and selection made for the report only display the name of a Commitment Item (G/L Account). To show the G/L Account number, the steps below are used.

1. Right mouse click on a column heading or active field within the column that needs added information, and in the resulting window, click on the **Properties** option.

2. Click on **Characteristic** to open a dialog box.

BW Based Reports (cont.)



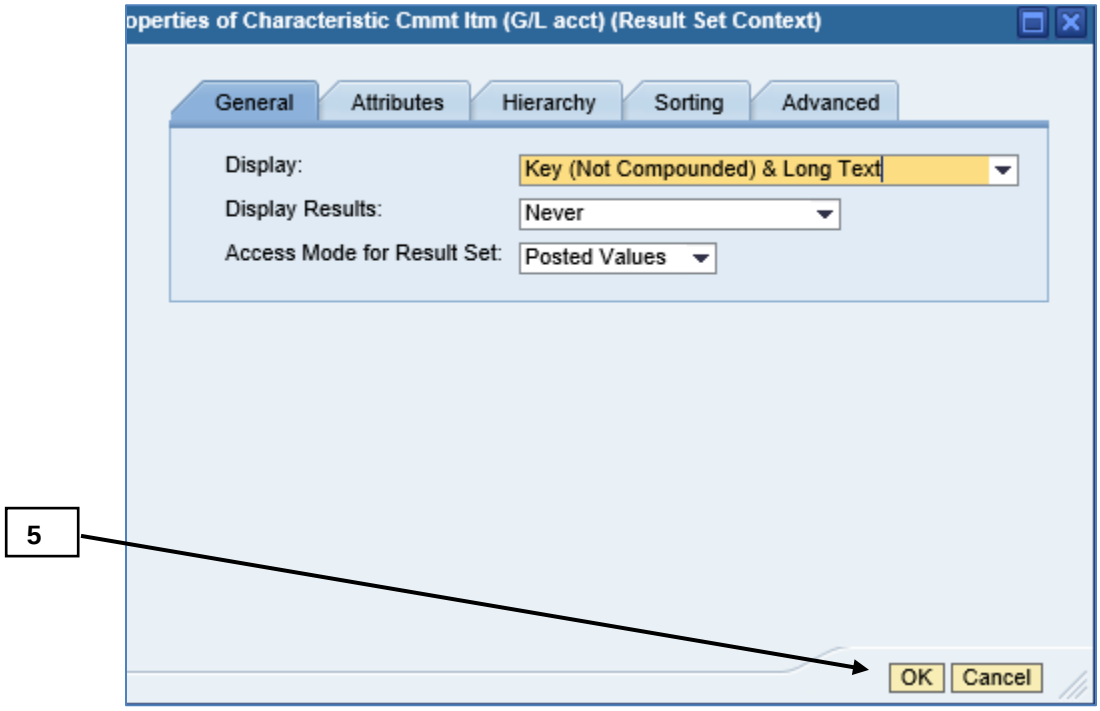
3. In the resulting window under the **General** default tab, use the **Drop-down** in the Display field (Long Text shows in this example).

Note: The Drop-down in the Display field on the General tab is the easiest way to add a number or text to a column. As an alternative, the Attributes tab may be used as well to choose and add a separate column that would contain the key or text.

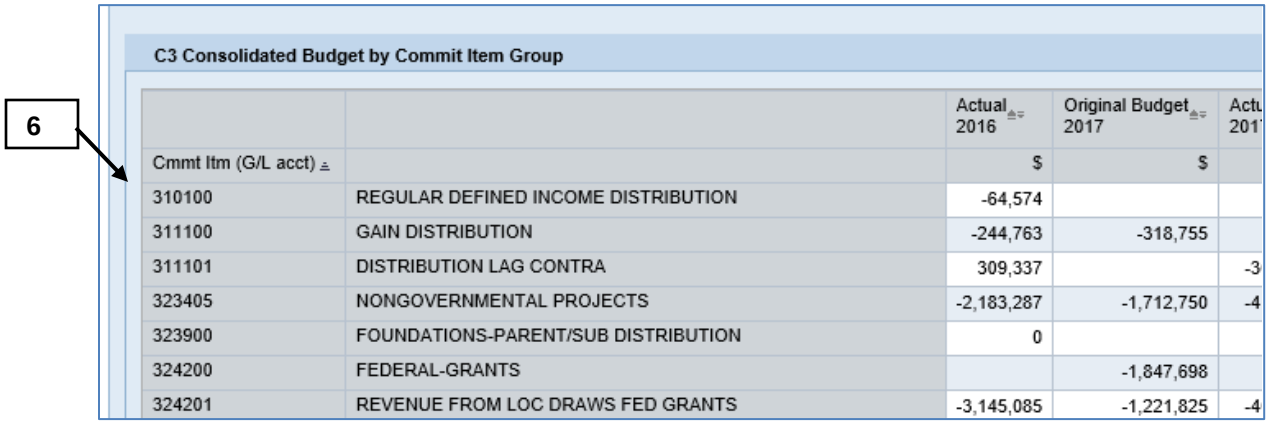
4. From the Drop-down menu, scroll through the many options and select an option that best suits your needs, as follows:

- Any option indicated as Key represents the number.
- Any option indicated as Text or Name represents a description or name.
- If you are interested in sorting numerically, then you'd want to select an option that begins with the word Key (in this example, Key Not Compounded and Long Text is a good choice as some Key choices show the word DUKE in front of the number).
- Experiment with selecting various options available until you find the right one for your needs.

BW Based Reports (cont.)



5. Once an option is selected, click OK to apply the choice to the report.



Cmmt Itm (G/L acct)		Actual 2016 $	Original Budget 2017 $	Actu 201
310100	REGULAR DEFINED INCOME DISTRIBUTION	-64,574		
311100	GAIN DISTRIBUTION	-244,763	-318,755	
311101	DISTRIBUTION LAG CONTRA	309,337		-3
323405	NONGOVERNMENTAL PROJECTS	-2,183,287	-1,712,750	-4
323900	FOUNDATIONS-PARENT/SUB DISTRIBUTION	0		
324200	FEDERAL-GRANTS		-1,847,698	
324201	REVENUE FROM LOC DRAWS FED GRANTS	-3,145,085	-1,221,825	-4

6. Review the additional information now added to and displayed in the column (in this example the Commitment Item / GL Account number is added to the beginning of the column for easy sorting).

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