Other MyResearch Report Functions

Note: Most MyResearch reports allow the manipulating of the report data to different views of the report. This includes the **click, drag, and drop functionality**, as well as the right mouse **click functionality**. The right mouse click functionality is similar to the functionality in SAP BW for those users that have experience with that tool.

Overview of Report Functions Available

1. Use the **click, drag, and drop** function to change the view of the report by moving columns of data to provide a different sort/view, for instance, from a cost object view (WBS Element) to a PI (Responsible Person) view (see Swap with steps in next pages).
2. Use the right mouse click (Windows) OR click (Mac) function on either a column heading or individual line item row within the columns of data (such as the 7 digit Cost Object or an amount for current month, FYTD, ITD, etc) to perform the following options:

- **Change Drilldown** – Contains the Swap… with function (name varies by column chosen) to change the analysis presented by “swapping” columns, such as changing from a Cost Object view to a view of the data by PI. This can also easily be done using the click, drag, and drop functionality.
- **Filter** – to filter a report by the selections available.
- **Sort (name varies by column chosen)** – to sort the column of data by text or key (number) in ascending or descending order).
- **Back One Navigation Step OR Back to Start** – to remove/undo a previous function or step performed or to return to the standard view of the report and remove all previous functions.
- **Broadcast and Export** – to export the report to an Excel file or a CSV (Comma Separated Value) file.
- **Print Version** – to print the report (steps vary depending on MyResearch report).

3. Use specific steps in this section of the guide to perform the functions outlined.
Other MyResearch Report Functions (cont.)

Using the “Swap with...” Function to Change View of Data

Note: Use the click, drag, and drop function to easily swap the view of the report data by exchanging the primary column of data with another. The Swap with... function allows you to change the data presented by “swapping” columns, which changes how the report data is sorted, subtotaled and displayed (example, from a display of all amounts by Cost Object (Fund Code) to a display of all amounts by PI). This Swap with... function is also available as a right mouse click option.

1. Note how the original MyResearch report is displayed / sorted (such as listed by Cost Object, then PI or Resp. Person, as many of the reports are sorted).

2. Decide how you would like the report to be displayed / sorted (example: by PI versus by Cost Object).

3. **Click once (left click) and hold the click** on the column heading to be used as the primary view/sort (click right on the text of the column heading – in this example PI) and hold the mouse click while moving the column.

4. Move the cursor/mouse until a **black line indicator** is displayed between columns – position the mouse/cursor so that the black line indicator is to the right of the column to be “swapped”.

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**Image注释:**

- **Image 1:** Diagram illustrating the process of using the “Swap with...” function.
- **Image 2:** Close-up of the report with annotated steps 1-4 explained.
- **Image 3:** Detailed view of the column headers and the process of swapping.
- **Image 4:** Macro view of the cursor and mouse position as the black line indicator is moved.
5. Release the right mouse click to “swap” the column selected with the column to the left of the black line indicator – notice the same report data is now sorted/displayed differently (in this example, by PI instead of by Cost Object).

**Filter Data or Refresh the Selection Criteria in a Report**

1. From any MyResearch report, **right mouse click (Windows) OR click (Mac) on any column or item cell within the report.**

2. In the resulting window, click on **Filter option** and click on the desired option as follows:).
   - **Select Filter Value** – to filter on selections provided.
   - **Variable Screen** – to refresh the query using the Variable Entry selection screen to select different values and run a new report.
3. In the resulting window of filter values (varies by column selected and report), click on the grey box beside the values that are to be filtered for the report to select those values (will be highlighted in gold).

4. Click on the Add button to display the selected values on the right side of the screen.

5. Once all selections for the filter are made, click on the OK button to complete the process.

   Note: Click on the box beside a selection on the right side under Selections and use the Remove button to “deselect” any items if needed.
6. To remove the filter value if needed, right mouse click (Windows) OR click (Mac) on any column or item cell within the report.

7. In the resulting window, click on Filter option and click on the Remove Filter Value option.

**Change the Sort of a Column**

1. Simply click on the triangle icon beside the column heading text to change the sort from the current (example ascending by cost object) to a different option (like descending order).

*Note:* The right mouse click option on the column heading may also be used. In the resulting box, select Sort (name varies by column selected) by option and then select from the choices.
Other MyResearch Report Functions (cont.)

Undo Steps or Functions Using the Back Function

1. From any MyResearch report, **right mouse click** (Windows) **OR click** (Mac) on any column or item cell within the report.

2. In the resulting window, click on **Back** option and choose either option:
   - **Back One Navigation Step** - to undo the latest action taken
   - **Back to Start** – to return to the original standard view of the report and undo all changes or actions taken.
Export a Report

1. From any MyResearch report, **right mouse click (Windows) OR click (Mac)** on any cell or item within the report.

2. In the resulting window, click on **Broadcast and Export** option and click on your **desired choice** as outlined below:
   - CSV File – to create a comma delimited flat file.
   - Export to Excel 2000 – to create an Excel file.

3. In the resulting **File Download** window (displays for both Excel and CVS choices), click on either **Open** or **Save** as outlined below.
   - **Open** – to open the spreadsheet (or CVS file) directly in Excel and display on your desktop.
   - **Save** – To save the file at a certain location on your personal computer (this option also allows you to Open the file as well - see next step for more).
4. **If the Save option was selected**, identify a location to save the file on your PC in the resulting *Save As* window per these steps:

- **Choose the directory path** in the *Save in* field at the top of the window.
- **Enter a File name** with the *extension of .xls* at the end of the name.
- **Choose Microsoft Excel Worksheet** (if not defaulted) in the *Save as type* field.
- **Click on the Save button.**

In the resulting *Download Complete* window, choose **Open** to both save the file and automatically open the Excel file **OR** choose **Close** to return to the report.
Other MyResearch Report Functions (cont.)

Print a Report

1. In the MyResearch report, **right mouse click (Windows) OR click (Mac)** anywhere in the report (column heading or line item).

2. In the resulting box, click on the **Print Version** option.

3. In the resulting **Export Dialog** box, change the **Orientation** field as desired (choose either **Portrait Format** or **Landscape Format** from the Drop-down options).

4. Once choices are made, click on the **OK** button.
5. In the resulting **File Download** window, click on the **Open** button to view the PDF file via your web browser and to complete the print process (click **Save** to save a copy of the PDF file on your computer if desired).

6. Depending on your web browser and how the PDF file was displayed, click on the appropriate print icon or use the File menu path to print preview, print, etc.