Business Warehouse Reporting Manual
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The Reporting System

Business Warehouse (BW) is Northern Kentucky University’s reporting system. It is used strictly for data retrieval and is available for use within the myNKU portal. This reporting system provides pre-defined queries that users customize to meet their needs. After customization, users often refer to these queries as reports. The queries in BW are derived from the Finance (FI), Human Resources (HR), and Student Lifecycle Management (SLCM) modules of SAP. The BW environment and queries are separate from SAP GUI and SAP GUI reports. Please also note, data-entry does not occur in Business Warehouse, and records cannot be maintained within the reporting interface.

Flowchart depicting data flow for NKU Enrollment by Specialization query.
Accessing Business Warehouse

Upon login to myNKU, follow the path below to generate a new report.

1. Select the Business Explorer tab.

2. Click the BEx Web Analyzer link.

   NOTE: Click either the link next to the icon (above), or the link that’s displayed as sub-tab.

3. Click New.

4. Click the Roles tab.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Allows users to search for queries by technical name and/or query description. Anything containing the sequence of letters/numbers entered in the field will populate in the Search Results grid. <strong>Asterisks may be utilized to complete searching</strong> (see note below)</td>
</tr>
<tr>
<td>History</td>
<td>Lists fifteen most recently accessed queries</td>
</tr>
<tr>
<td>Favorites</td>
<td>This tab is not currently utilized</td>
</tr>
<tr>
<td>Roles</td>
<td>Lists BW roles the user has access to</td>
</tr>
<tr>
<td>InfoArea</td>
<td>This tab is not currently utilized</td>
</tr>
</tbody>
</table>

**NOTE:** The asterisk (*) notifies the system of how to search for the sequence of letters/numbers input in the search field. A search of son* would seek out any match beginning with "son." A search containing *son would seek out any match ending in "son." A search containing *son* would seek out any match containing "son", regardless of where the searched characters reside.

A list of folders will display. **This list is determined by user security within Business Warehouse.**
5. Click directly on the text, highlighting the folder to be opened.

6. Single-click to select a query, and click **OK**.
Specifying Your Parameters

The queries in BW are designed to meet different needs for various users throughout the institution. The Variable Entry screen is where users identify the information specific to their needs. The requested variables are particular to the query selected.

Example Variable Entry screen

Variables marked with an asterisk (*) are required entries; they must be populated in order to proceed. Required entries are identified in the left-most column. To limit the results of any report, input as many variables as possible. The “Current Selection” column must be populated with precise codes to generate a report. To input these criteria click the selection button (outlined above) that correlates to the variable desired. Also remember, the values may be keyed directly into the corresponding cell. Once this column is populated use the buttons described below to:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Generate a report</td>
</tr>
<tr>
<td>Check</td>
<td>Ensure the values in the Current Selection column correspond to values in the BW system</td>
</tr>
</tbody>
</table>

Please note, selections made within this screen do not always display as columns within the report. Refer to the Info button for detailed information about the displayed report.
Select Values
The “Select Values” dialog box displays as a pop-up window within the internet browser. From here, users choose which information to retrieve. Please note, this is the same dialog box utilized when placing filters on your report. It contains a list of the potential entries that can be filtered to meet specific needs, and allows users to retrieve as much or as little information as desired. Some variables have thousands of entries to choose from. By default, the "Select Values" dialog box only displays the first one thousand (1,000) values. The following message at the top of the window indicates to the user that potential values are not immediately displayed:

⚠️ More than 1000 values available; not all values are displayed.

To increase the number of records displayed:

1. Type several more zero's in the Maximum Records: field.

   ![Image of Maximum Records field set to 1000000]

2. Click Refresh.

Filtering the displayed results:

1. Type an asterisk (*) in the Filter row, the text necessary for filtering, and another asterisk.

   ![Image of filter row with "*2009*"

   NOTE: The filtered results display immediately beneath the Filter row.

2. To return to the list of all entries, delete the text and click the Filter button.

   ![Image of filter button]

   NOTE: Users may also delete the text and strike Enter on the keyboard, or click Refresh.
Selecting values:

1. a. Click **Select All** to choose every value that is available.

   ![Select All]

   - **Academi**
   - **#**

b. Single-click any value to select only the appropriate match. **Multiple values may be selected.**

   ![Value Selection]

   - **2010**
   - **2010-2011**
   - **2012**
   - **2016-2017**
   - **2017**
   - **2017-2018**

   ![Value Selection Example]

   - **Enter a Value for:**
   - **Academic Year:** 2010

   ![Value Entry]

c. Key any value into the **Enter a Value for:** textbox. **Multiple values may be input; be sure to separate values using a semicolon (;) and a space.**

   ![Value Entry]

2. Click **Add.**

   ![Add Button]

   ![Add Example]

   **NOTE:** Use **Remove** to eliminate a value.

4. Click **OK** to navigate back to the **Variable Entry** screen.

   ![OK Button]
Selecting a range of values:

1. Select **Value Ranges** from the “Show tool” drop-down menu.

2. Input the data necessary in the Value ranges pane:

   **Sign**: Highlight an entry from the drop-down menu.

<table>
<thead>
<tr>
<th>Text</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include</td>
<td><img src="image" alt="Include" /></td>
<td>Selects data within the values specified below</td>
</tr>
<tr>
<td>Exclude</td>
<td><img src="image" alt="Exclude" /></td>
<td>Selects data outside the values specified below</td>
</tr>
</tbody>
</table>

   **Operator**: Highlight an entry from the drop-down menu.

<table>
<thead>
<tr>
<th>Text</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>between</td>
<td><img src="image" alt="between" /></td>
<td>Selects a range of data between two values</td>
</tr>
<tr>
<td>Equal</td>
<td><img src="image" alt="Equal" /></td>
<td>Selects exact match(s) to data defined in the From: field</td>
</tr>
<tr>
<td>Greater</td>
<td><img src="image" alt="Greater" /></td>
<td>Selects data of a higher value than defined in the From: field</td>
</tr>
<tr>
<td>Greater or equal</td>
<td><img src="image" alt="Greater or equal" /></td>
<td>Selects an exact match AND data of a higher value than defined in the From: field</td>
</tr>
<tr>
<td>lower</td>
<td><img src="image" alt="lower" /></td>
<td>Selects data of a lesser value than defined in the From: field</td>
</tr>
<tr>
<td>Lower or equal</td>
<td><img src="image" alt="Lower or equal" /></td>
<td>Selects an exact match AND data of a lesser value than defined in the From: field</td>
</tr>
</tbody>
</table>

   **From**: Use the selection button to identify the value, or type it directly in the field.

   ![From](image)

   **NOTE**: Selecting "Operator: between" requires users to also identify a value in the To: field.

3. Click **OK** to go back to the Variable Entry screen.
Changing the order of your values:

1. Highlight the value(s) you’d like to re-order.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011 2010-2011</td>
</tr>
<tr>
<td></td>
<td>2010 2009-2010</td>
</tr>
<tr>
<td></td>
<td>2012 2011-2012</td>
</tr>
<tr>
<td></td>
<td>2013 2012-2013</td>
</tr>
<tr>
<td></td>
<td>2009 2008-2009</td>
</tr>
</tbody>
</table>

2. Use the “Change Order” buttons to place the value(s) in the desired order. Multiple values can be selected.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Moves selected entries to the beginning</td>
</tr>
<tr>
<td></td>
<td>Moves selected entries up one row</td>
</tr>
<tr>
<td></td>
<td>Moves selected entries down one row</td>
</tr>
<tr>
<td></td>
<td>Moves selected entries to the bottom</td>
</tr>
</tbody>
</table>

3. Click OK to navigate back to the Variable Entry screen.

NOTE: Repeat all steps above, as necessary, until the Variable Entry screen is populated.

Navigating back to the Variable Entry screen:

1. After the report is generated, right-click anywhere within the report.

2. Click Filter Variable Screen.

The Variable Entry screen opens as a pop-up window within the internet browser.

OR

1. Click the Variable Screen button on the BW toolbar.

The Variable Entry screen opens as a pop-up window within the internet browser.
Saving Your Entries as a Variant

Users often access the same queries many times throughout the year. Business Warehouse provides a feature to enable users to save the selections entered into the Variable Entry screen. This allows users to generate a report in fewer clicks. To save the entries as a variant:

1. Click **Save As...**

   ![Available Variants:](Image)

2. Ensure "Save As User Variant" contains a check-mark.

   ![Save Variant](Image)

3. Type a meaningful title in the **Description:** textbox.

   ![Description:](Image)

4. Click **OK.**

   ![OK](Image)

**Changing your variants:**

1. Select a variant from the "Available Variants" drop-down menu.

   ![Available Variants:](Image)

2. Edit the variables, then click **Save.**

   ![Available Variants:](Image)

3. To remove a variant, click **Delete.**

   ![Available Variants:](Image)
The Business Warehouse Toolbar

In every query, the standard BW environment displays above the report area. The options described below remain consistent on each report.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New Button" /></td>
<td>Launch a new report</td>
</tr>
<tr>
<td><img src="image" alt="Save Button" /></td>
<td>Save a report for future reference</td>
</tr>
<tr>
<td><img src="image" alt="Details Button" /></td>
<td>Access detailed information about the query <a href="#">See Appendix A</a></td>
</tr>
<tr>
<td><img src="image" alt="Preview Button" /></td>
<td>Preview the report as a .pdf file</td>
</tr>
<tr>
<td><img src="image" alt="Export Button" /></td>
<td>Export the report to Microsoft® Excel</td>
</tr>
<tr>
<td><img src="image" alt="Filter Options" /></td>
<td>Access report documentation</td>
</tr>
<tr>
<td><img src="image" alt="Settings Options" /></td>
<td>Open the Filter Options</td>
</tr>
<tr>
<td><img src="image" alt="Variable Screen" /></td>
<td>Open the Variable Entry Screen</td>
</tr>
<tr>
<td><img src="image" alt="View Options" /></td>
<td>Open the alternate views (if applicable)</td>
</tr>
</tbody>
</table>

**Important:** The toolbar displayed here applies only to those reports generated from the "New" button within the BEx Web Analyzer beginning **Monday February 20th, 2012**; reports saved in the BEx Portfolio or Portal Favorites before Monday February 20th, 2012 will not contain this version of the toolbar when they are launched. Please see [Appendix B](#) for more information.
Navigating Between Views & Pages

Various BW reports allow the user to toggle between several representations of the same data by utilizing the “View:” menu. To navigate to a different view, place the cursor on the drop-down menu (indicated below) and select one of the options. Views vary based upon the report opened.

Navigational buttons (outlined below) appear directly above and below the report area and are useful when crossing between pages. These buttons are only displayed when a report is multiple pages in length. To scroll between pages, single-click one of the buttons illustrated below. Please note, pages are displayed in rows of twenty-five (25).

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ ▲ ▲</td>
<td>Moves to first entry/first page, first 25 lines</td>
</tr>
<tr>
<td>▲</td>
<td>Moves up one page, per 25 lines</td>
</tr>
<tr>
<td>▲</td>
<td>Moves up one row</td>
</tr>
<tr>
<td>▼</td>
<td>Moves down one row</td>
</tr>
<tr>
<td>▼ ▼ ▼</td>
<td>Moves down one page, per 25 lines</td>
</tr>
<tr>
<td>▼</td>
<td>Moves to last entry/last page, last 25 lines</td>
</tr>
</tbody>
</table>

Users can also type a number directly in the Page textbox (indicated below) and strike Enter on the keyboard. Please note, one can use either textbox for page navigation.
Making Your Report Meaningful to You

Once appropriate variables have been input a report is generated. There are several ways to manage the data, and create a unique report that contains information pertinent to each user. Editing the report is accomplished through drill down. Drill down within a report increases the level of detail and limits the information displayed within the immediate view. Take note; when you need to undo an action do not use your browser’s navigational buttons. Instead:

1. Right-click within the report to open the BW Context Menu.

2. Select Back, and then select Back One Navigation Step or Back to Start.

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back One Navigation Step</td>
<td>Equivalent to a browser Back button; navigates back to the previous drilldown</td>
</tr>
<tr>
<td>Back to Start</td>
<td>Equivalent to generating the report again; navigates back to the original data</td>
</tr>
</tbody>
</table>

Free Characteristics

A free characteristic (FC) is a field in a query that can be used to drill down. These fields are different from variables, in that they are not displayed until after the initial run of the query. Free characteristics are viewed as rows or columns and can be added to each report using simple drag-and-drop functionality. Free characteristics are specific to the various modules, and vary by query. Click here to view a document containing descriptions to some of the most common free characteristics.

Adding a free characteristic:

1. Place the cursor directly on top of the FC.

2. Drag the FC to the report, or the Rows area directly above the free characteristics.

3. When you see the divider (below), let go.
Adding a free characteristic– Option Two:

1. Right-click directly on top of the FC.

2. Select **Change Drilldown** and **Drill Down By**, then select **Horizontal or Vertical**.

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horizontal</td>
<td>Inputs the FC as a row.</td>
</tr>
<tr>
<td>Vertical</td>
<td>Inputs the FC as a column.</td>
</tr>
</tbody>
</table>

Displaying additional information about a free characteristic:

1. Place the cursor directly on top of the FC.

2. Select **Properties** and **Characteristic**.

3. Click the **Attributes** tab.

**NOTE:** See step two of **Selecting Values** for step by step instructions for choosing available values.
Removing a free characteristic:

1. Place the cursor directly on top of the FC.

   ![Academic Year]  | Offe
   2011  | 10-2011  | Psy

2. Drag the cursor in any direction; when you see the "X" let go.

Swapping free characteristics:

1. Right-click on top of the FC.

   ![Academic Year]  | Offe
   2011  | 10-2011  | Psy
   2011020  |  | Psy
   2011030  |  | Psy

2. In the BW Context menu, select Change Drilldown and Swap ______ with.

   ![Change Drilldown]  | Drill Down By
   ![Broadcast and Export]  | Swap Academic Session with
   ![Save View]  | Remove Drilldown

3. A scrolling menu appears. Single click on the FC.

   ![Change Drilldown]  | Drill Down By
   ![Broadcast and Export]  | Swap Academic Session with
   ![Academic level]  |
Drill down also includes filtering the query. Filtering enables each user to make informed decisions based on very specific data sets. The benefit of filtering is that it does not eliminate the original data; it simply removes data from your immediate view. Users choose the parameters for filtering using the Select Values dialog box. To place a filter on the report:

1. Right-click on the characteristic.

2. Click Filter and Select Filter Value.

3. See Selecting Values to proceed.
Filtering – Option Two:

1. Click the Filter button.

2. Click the drop-down button for the appropriate characteristic and then click Edit.

3. See Selecting Values to proceed.

4. Click Close to collapse the filter options.

Filtering – Option Three:

1. Right-click on a cell.

2. Click Filter and Keep Filter Value on Axis.

NOTE: This method of filtering is only appropriate when interested in viewing data contained in one cell; all other values will be removed from immediate view.
Removing a filter:

1. Right-click the FC.

2. Highlight the value(s) that should be removed. Click Remove, and then OK.

Removing a filter – Option Two:

1. Right-click the FC.

2. Select Filter \textit{u} Remove Filter Value.
In addition to filtering, users may also determine the order in which their data is displayed by editing the sort order of a field. Sorting can be completed on columns that contain both numeric (1,2,3) and alpha (a,b,c) characters. Users may sort in ascending or descending order. To sort a column:

1. Right-click on the Free Characteristic that requires editing.
   
   In this example, sorting will be completed on **Prev. Acad Period**.

2. Select Sort [field] $u$, and then make a selection.

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ascending by Text</td>
<td>Sorts the characteristic in A-Z order based on alpha characters</td>
</tr>
<tr>
<td>Descending by Text</td>
<td>Sorts the characteristic in Z-A order based on alpha characters</td>
</tr>
<tr>
<td>Ascending by Key (Internal)</td>
<td>Sorts the characteristic in 1-9 order based on numeric characters</td>
</tr>
<tr>
<td>Descending by Key (Internal)</td>
<td>Sorts the characteristic in 9-1 order based on numeric characters</td>
</tr>
</tbody>
</table>

NOTE: When a field is sorted, a checkmark will display next to sort option selected.
Saving Your Report

Oftentimes users need to frequently access a single query based on similar information. Business Warehouse allows queries to be saved in the myNKU portal environment; thus saving time and allowing users to retrieve up-to-date information while eliminating the need to customize a single query multiple times.

Portal Favorites
Users can save formatted queries as Portal Favorites. Saved reports are specific to each user- no one may directly access others’ Portal Favorites. What’s more; Portal Favorites can be accessed from any tab in the user’s myNKU account from the "Favorites" folder located on the myNKU header. To save any report as a Portal Favorite:

1. Click the Save As… button

2. Title the report, and click OK.

**NOTE:** Portal Favorites is the default location for saving. Click [here](#) for instruction on saving to myNKU’s BEx Portfolio.

Displaying Your Portal Favorites:

1. Click the “Favorites” option to view the complete list of saved entries.
Opening a Saved Report:

1. Single-click the "Favorites" option.

![Favorites option]

2. Select the desired favorite.

![Demo - Two selected]

**NOTE:** The Variable Entry screen will display. After ensuring the desired parameters are selected click "OK."

Managing Your Portal Favorites:

1. Select “Organize Favorites.”

![Organize Favorites]

2. Click to expand the “Portal Favorites” section.

![Portal Favorites expanded]

**NOTE:** Users may select (Collapse All) to quickly hide the displayed list of favorites.
3. Selections for editing your saved reports are available on the toolbar. Utilize the buttons on the toolbar to:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add" /></td>
<td>Adds a new link to favorites</td>
</tr>
<tr>
<td><img src="image" alt="Create" /></td>
<td>Creates a new favorites folder</td>
</tr>
<tr>
<td><img src="image" alt="Remove" /></td>
<td>Removes the selected item</td>
</tr>
<tr>
<td><img src="image" alt="Rename" /></td>
<td>Renames the selected item</td>
</tr>
<tr>
<td><img src="image" alt="Up" /></td>
<td>Moves the selected item up one position</td>
</tr>
<tr>
<td><img src="image" alt="Down" /></td>
<td>Moves the selected item down one position</td>
</tr>
<tr>
<td><img src="image" alt="Cut" /></td>
<td>Cut a favorite item</td>
</tr>
<tr>
<td><img src="image" alt="Paste" /></td>
<td>Paste a favorite item</td>
</tr>
</tbody>
</table>

4. When edits are complete, select “Close.”
**BEx Portfolio**

The portfolio is an area inside myNKU that allows users to save/access reports. This restricted area enables users with similar access to collaborate and view reports based on the same data sets. To save a report to BEx Portfolio:

1. Click the **Save As**...button

2. Select the **BEx Portfolio** tab.

3. Select the destination folder; click directly on the text to highlight the folder to be opened.

4. Select the department’s folder.

   **NOTE:** Be advised, additional drill down may be required. Further navigation will be dependent upon the structure determined by the business unit.

5. Title the report, and click **OK**.
Accessing BEx Portfolio:

1. Click the Business Explorer tab.

2. Click the BEx Portfolio link.

3. Select the desired folder.

4. Select the department's folder.

**NOTE:** Be advised, additional drill down may be required. Further navigation will be dependent upon the structure determined by the business unit.
Changing the Appearance of Your Report

Queries are formatted in BW in standard gray scale. To apply other formatting options, users may export data to Microsoft® Excel. Exporting allows users to apply color schemes, insert formulas, add comments, and complete numerous other tasks. When the export functionality is utilized users get full access to the application. To export a report:

1. Click the **Export to Microsoft Excel** button.

2. Click **Open** or **Save**.

3. Click **Yes** in the "File Download" dialog box.

**NOTE:** See Microsoft Office® Help and How-to for assistance with **Saving a File**. See Microsoft Office® Support for assistance with using Excel.
Appendix A

Information on Query tab

The Info button allows the user to identify pertinent details specific to the displayed query. Detailed sections include: General Information, Static Filters, Dynamic Filters & Variables.

A: General Information
- Provides detailed technical information specific to the query.

B: Static Filters
- Identifies fields that cannot be altered; they are applied to the query at development. The selections indicated on the Variable Entry screen are also included in this group.

C: Dynamic Filters
- Identifies fields that have been filtered after the query is initially ran.

D: Variables
- Identifies the parameters placed specific to the Variable Entry screen. This area will only display the values for which parameters were placed in the Variable Entry screen.

NOTE: The fields displayed in B, C & D (above) are specific to the query and will vary based upon the customization of the open report.
Appendix B

The Business Warehouse Toolbar

The illustrations below provide detail related to the Business Warehouse toolbar and page navigation prior to Monday February 20th, 2012. This information is specific to saved reports accessed via Portal Favorites or BEx Portfolio before Monday February 20th, 2012.

A. Identifies the query you’re working with. *This may vary from what is indicated above.*
B. Identifies the last time the query was refreshed. *This may vary from what is indicated above.*

<table>
<thead>
<tr>
<th><strong>Button</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>New Analysis</td>
<td>Launch a new report</td>
</tr>
<tr>
<td>Open</td>
<td>Open a saved report</td>
</tr>
<tr>
<td>Save As…</td>
<td>Save a report for future reference</td>
</tr>
<tr>
<td>Info</td>
<td>Access detailed information about the query</td>
</tr>
<tr>
<td></td>
<td><em>See Appendix A</em></td>
</tr>
<tr>
<td>Print Version</td>
<td>Print the open report</td>
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<td>Export to Microsoft Excel</td>
<td>Send the report to Microsoft® Excel</td>
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<td>Variable Screen</td>
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<td>Filter</td>
<td>Open the Filter Options</td>
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<td>Settings</td>
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