



# Business Warehouse Reporting Manual



NORTHERN KENTUCKY UNIVERSITY

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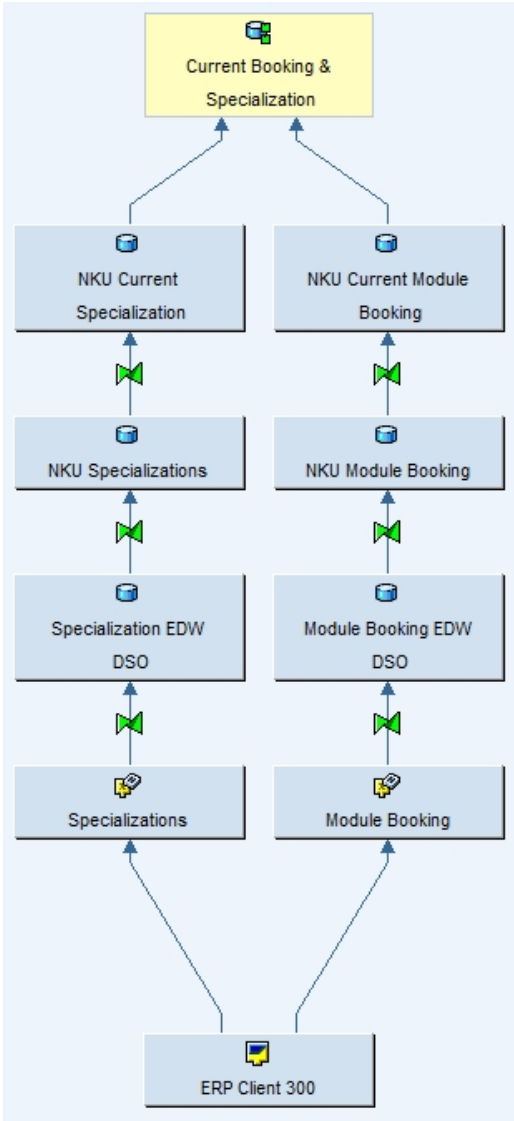
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# The Reporting System

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.

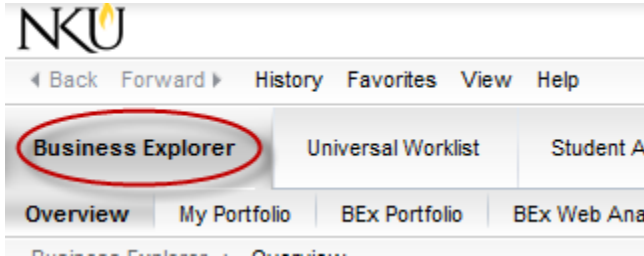


Flowchart depicting data flow for NKU Enrollment by Specialization query.

## 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.

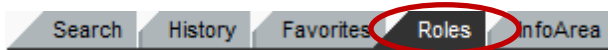


**NOTE:** Click either the link next to the icon (above), or the link that's displayed as sub-tab.

3. Click **New**.



4. Click the **Roles** tab.

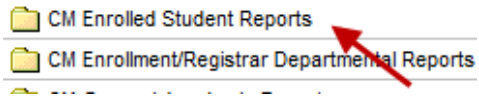


<i>Tab</i>	<i>Description</i>
<b>Search</b>	Allows users to search for queries by technical name and/or query description. Anything containing the sequence of letters/numbers entered in the field will populate in the Search Results grid. <b>Asterisks may be utilized to complete searching</b> (see <b>note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

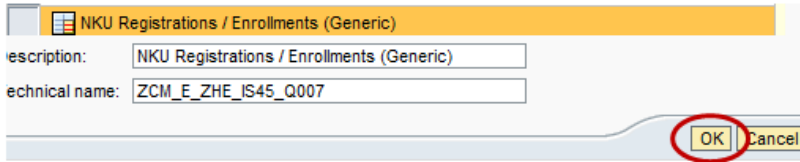
**NOTE:** The asterisk (\*) notifies the system of how to search for the sequence of letters/numbers input in the search field. A search of *son\** would seek out any match beginning with "son." A search containing *\*son* would seek out any match ending in "son." A search containing *\*son\** would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

**Variable Entry**

Available Variants:  Save Save As... Delete [Show Variable Personalization](#)

General Variables			
	Variable	Current Selection	Description
*	Academic Years		
	Academic Session		
*	Progression Category		
*	Specialization as of		

OK Check

*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:


<b>Button</b>	<b>Description</b>
OK	Generate a report
Check	Ensure the values in the Current Selection column correspond to values in the BW system

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.



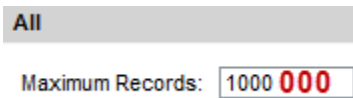
## Select Values

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:

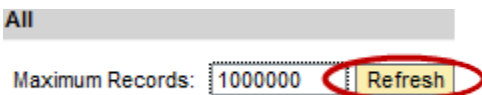
1. Type several more zero's in the *Maximum Records*: field.



All

Maximum Records: 1000 000

2. Click Refresh.




All

Maximum Records: 1000000 Refresh

## Filtering the displayed results:

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



	Academic Year: Key	Academic Year: Text
		*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**.



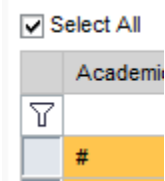
Academic Ye



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

## Selecting values:

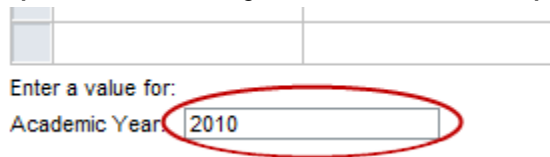
1. a. Click **Select All** to choose every value that is available.



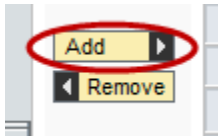
1. b. Single-click any value to select only the appropriate match. **Multiple values may be selected.**

<input type="checkbox"/>	2010	2009-2010
<input type="checkbox"/>	2011	2010-2011
<input type="checkbox"/>	2012	2011-2012
<input type="checkbox"/>	2017	2016-2017
<input type="checkbox"/>	2018	2017-2018

1. 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.**

A screenshot of a text input field. The field is empty. Below it, the text "Enter a value for:" is displayed. Underneath that, the text "Academic Year" is followed by a text box containing the number "2010". The "2010" is circled in red.

2. Click **Add**.



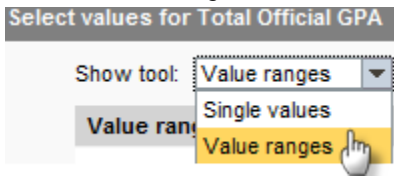
**NOTE:** Use **Remove** to eliminate a value.

4. Click **OK** to navigate back to the [Variable Entry](#) screen.



## 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.

<i>Text</i>	<i>Button</i>	<i>Description</i>
Include		Selects data within the values specified below
Exclude		Selects data outside the values specified below

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

<i>Text</i>	<i>Button</i>	<i>Description</i>
between		Selects a range of data between two values
Equal		Selects exact match(s) to data defined in the <i>From:</i> field
Greater		Selects data of a higher value than defined in the <i>From:</i> field
Greater or equal		Selects an exact match AND data of a higher value than defined in the <i>From:</i> field
lower		Selects data of a lesser value than defined in the <i>From:</i> field
Lower or equal		Selects an exact match AND data of a lesser value than defined in the <i>From:</i> field

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




**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.

Selections		
	Type	Description
	≡	2011 2010-2011
	≡	2010 2009-2010
	≡	2012 2011-2012
	≡	2013 2012-2013
	≡	2009 2008-2009

2. Use the "Change Order" buttons to place the value(s) in the desired order.

Multiple values can be selected.

Button	Description
	Moves selected entries to the beginning
	Moves selected entries up one row
	Moves selected entries down one row
	Moves selected entries to the bottom

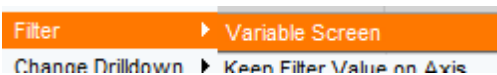
3. Click OK to navigate back to the [Variable Entry](#) screen.



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

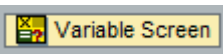
## Navigating back to the Variable Entry screen:

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.

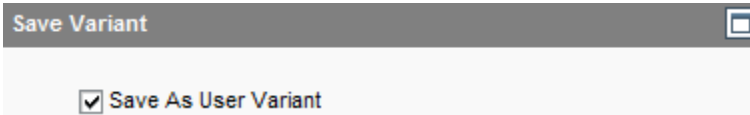
## Saving Your Entries as a Variant

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:

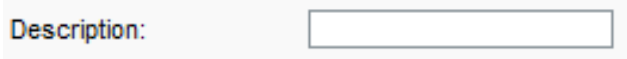
1. Click **Save As...**



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



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

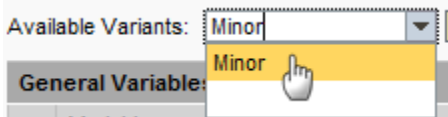


4. Click **OK**.

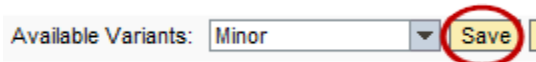


### Changing your variants:

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



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

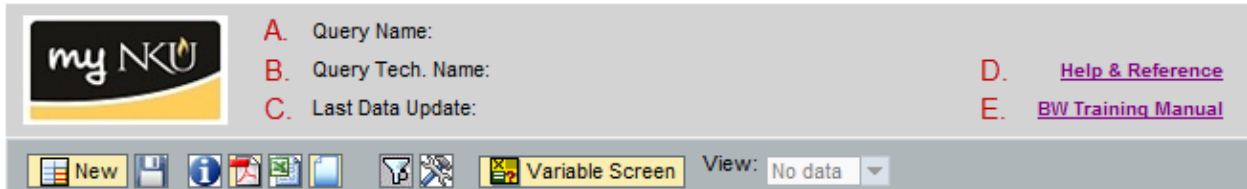


3. To remove a variant, click **Delete**.



## 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.



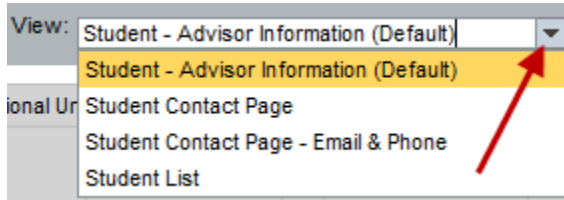
- A. Identifies the description of the open query.
- B. Identifies the technical name of the open query.
- C. Identifies the day and time the open query was refreshed.
- D. Hyperlink to the myNKU Help website.
- E. Hyperlink to the Business Warehouse Reporting Manual.

<i>Button</i>	<i>Description</i>
	Launch a new report
	Save a report for future reference
	Access detailed information about the query <a href="#">See Appendix A.</a>
	Preview the report as a .pdf file
	<a href="#">Export the report to Microsoft® Excel</a>
	Access report documentation
	Open the Filter Options
	Open the Settings Options
	Open the <a href="#">Variable Entry Screen</a>
View: (Default) ▼	Open the alternate views (if applicable)

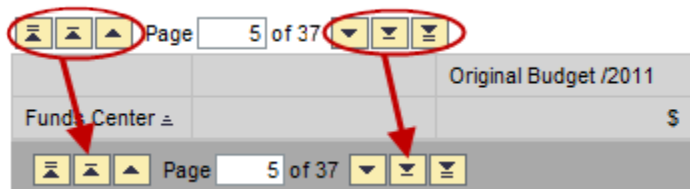
**IMPORTANT:** The toolbar displayed here applies only to those reports generated from the “New” button within the BEx Web Analyzer beginning **Monday February 20<sup>th</sup>, 2012**; reports saved in the [BEx Portfolio](#) or [Portal Favorites](#) before Monday February 20<sup>th</sup>, 2012 will not 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.*

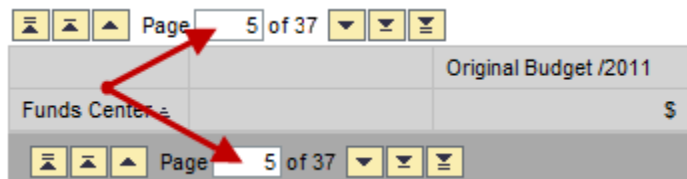


Navigational buttons (outlined below) appear directly above and below the report area and are useful when crossing between pages. These buttons are only displayed when a report is multiple pages in length. To scroll between pages, single-click one of the buttons illustrated below. *Please note, pages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



<i>Button</i>	<i>Description</i>
	Moves to first entry/ first page, first 25 lines
	Moves up one page, per 25 lines
	Moves up one row
	Moves down one row
	Moves down one page, per 25 lines
	Moves to last entry/last page, last 25 lines

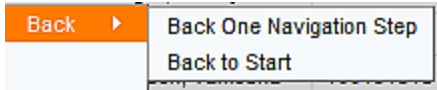
Users can also type a number directly in the *Page* textbox (indicated below) and strike **Enter** on the keyboard. *Please note, one can use either textbox for page navigation.*



## 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*.



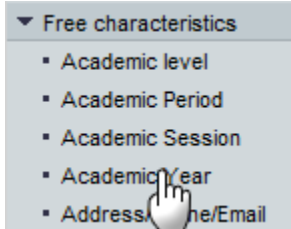
<i>Menu Option</i>	<i>Description</i>
Back One Navigation Step	Equivalent to a browser <i>Back</i> button; navigates back to the previous drilldown
Back to Start	Equivalent to generating the report again; navigates back to the original data

### Free Characteristics

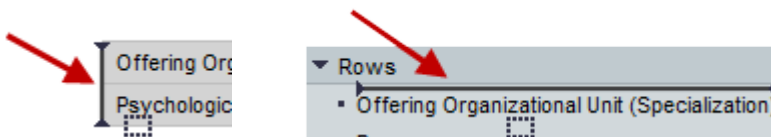
A free characteristic (FC) is a field in a query that can be used to drill down. These fields are different from variables, in that they are not displayed until after the initial run of the query. Free characteristics are viewed as rows or columns and can be added to each report using simple drag-and-drop 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:

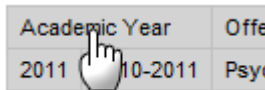
1. Right-click directly on top of the FC.
2. Select **Change Drilldown**  $\cup$  **Drill Down By**  $\cup$ , then select *Horizontal* or *Vertical*.



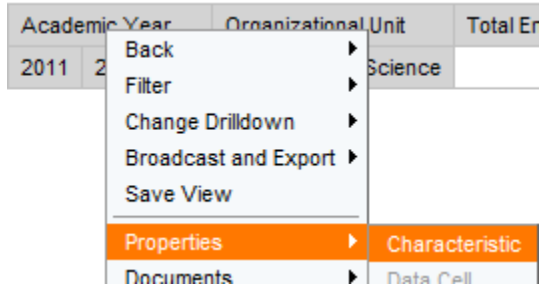
<i>Menu Option</i>	<i>Description</i>
Horizontal	Inputs the FC as a row.
Vertical	Inputs the FC as a column.

### Displaying additional information about a free characteristic:

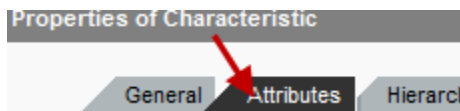
1. Place the cursor directly on top of the FC.



2. Select **Properties**  $\cup$  **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	Offer
2011	10-2011 Psyc

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.

Year	Academic Period	Offer
10-2011	2011	Psyc
	2011020	Psyc
	2011030	Psyc

2. In the BW Context menu, select **Change Drilldown** or **Swap \_\_\_\_\_ with**.

1101	Back	Organizational Unit (Specialization)
1102	Filter	al Science
1103	Change Drilldown	Drill Down By
	Broadcast and Export	Swap Academic Session with
	Save View	Remove Drilldown

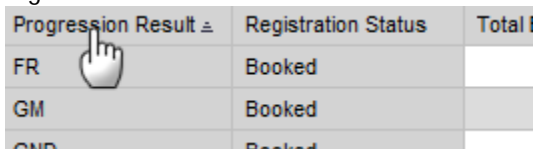
3. A scrolling menu appears. Single click on the FC.

Change Drilldown	Drill Down By	
Broadcast and Export	Swap Academic Session with	Academic level

## Filtering Your Report

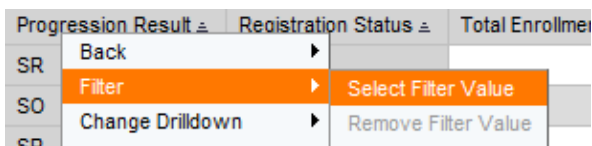
Drill down also includes filtering the query. Filtering enables each user to make informed decisions based on very specific data sets. The benefit of filtering is that it does not eliminate the original data; it simply removes data from your immediate view. Users choose the parameters for filtering using the [Select Values](#) dialog box. To place a filter on the report:

1. Right-click on the characteristic.



Progression Result	Registration Status	Total
FR	Booked	
GM	Booked	
GND	Booked	

2. Click **Filter** or **Select Filter Value**.



Progression Result	Registration Status	Total Enrollment
SR	Back	
SO	Filter	Select Filter Value
SR	Change Drilldown	Remove Filter Value

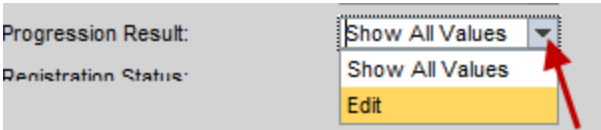
3. See [Selecting Values](#) to proceed.

## Filtering – Option Two:

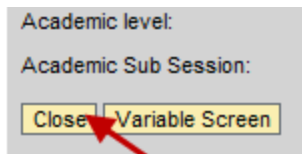
1. Click the **Filter** button.



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

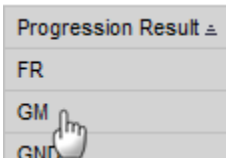


3. See [Selecting Values](#) to proceed.
4. Click **Close** to collapse the filter options.

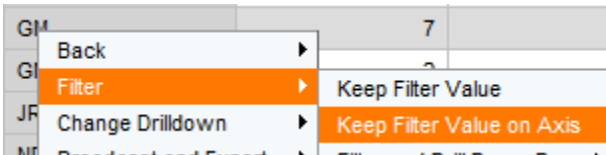


## Filtering – Option Three:

1. Right-click on a cell.



2. Click **Filter** > **Keep Filter Value on Axis**.



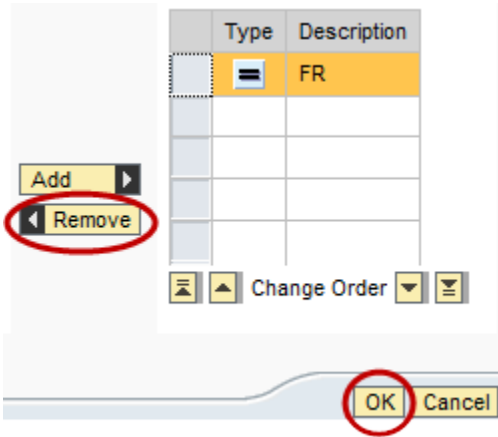
**NOTE:** This method of filtering is only appropriate when interested in viewing data contained in **one** cell; all other values will be removed from immediate view.

## Removing a filter:

1. Right-click the FC.

Progression Result ▾	Registration Status
FR	Booked

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



## Removing a filter – Option Two:

1. Right-click the FC.

Progression Result ▾	Registration Status	Total I
FR	Booked	
GM	Booked	
GM	Booked	


2. Select **Filter** > **Remove Filter Value**.

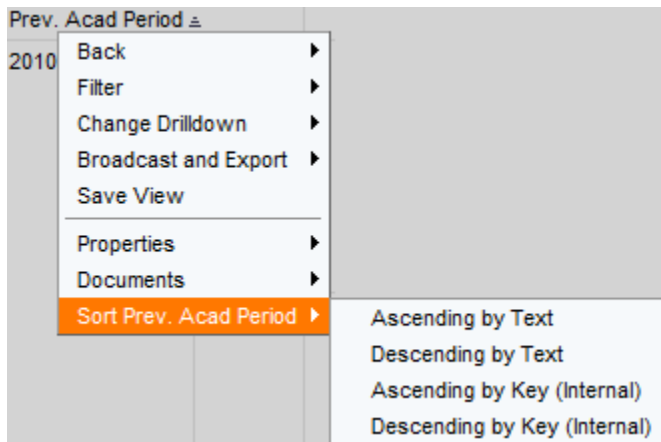
Progression Result	Registration Status	Total Enroll
FR		

- Back
- Filter
  - Select Filter Value
  - Remove Filter Value
- Change Drilldown
- Broadcast and Export
  - Variable Screen

## Sorting Your Report

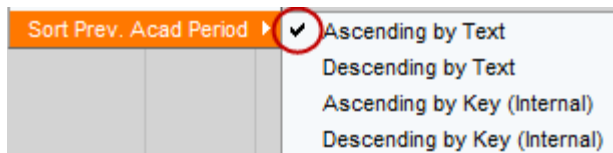
In addition to filtering, users may also determine the order in which their data is displayed by editing the sort order of a field. Sorting can be completed on columns that contain both numeric (1,2,3) and alpha (a,b,c) characters. Users may sort in ascending or descending order. To sort a column:

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]** , and then make a selection.



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

**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.

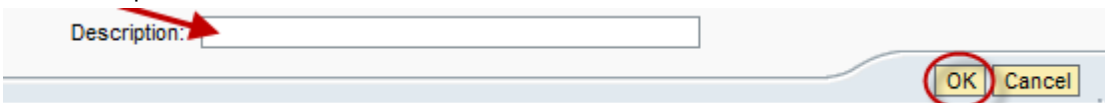
### Portal Favorites

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



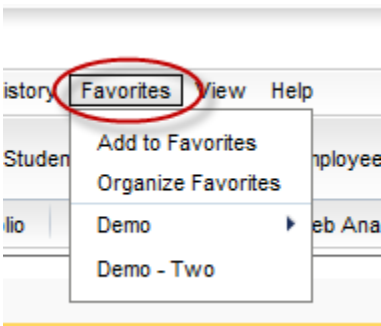
2. Title the report, and click **OK**.



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

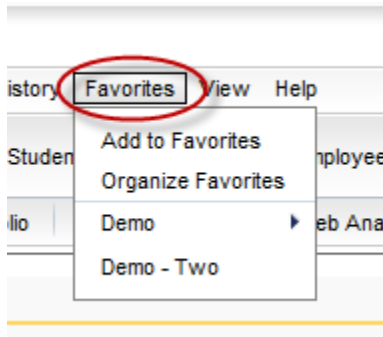
### Displaying Your Portal Favorites:

1. Click the "Favorites" option to view the complete list of saved entries.

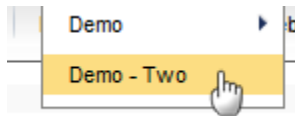


## Opening a Saved Report:

1. Single-click the "Favorites" option.



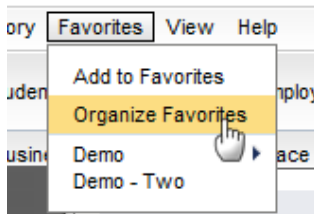
2. Select the desired favorite.



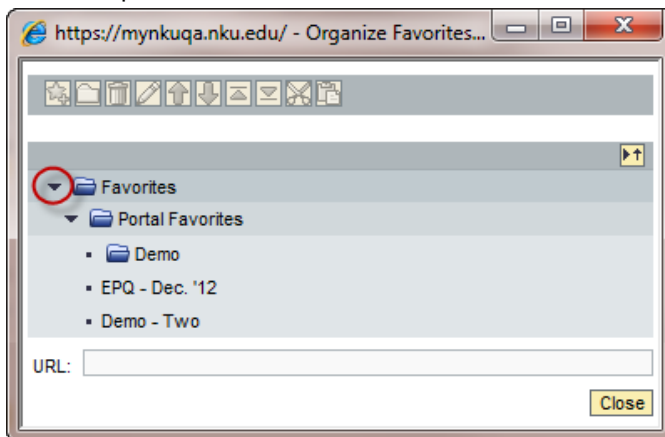
**NOTE:** The Variable Entry screen will display. After ensuring the desired parameters are selected click "OK."


## Managing Your Portal Favorites:

1. Select "Organize Favorites."











2. Click to expand the "Portal Favorites" section.



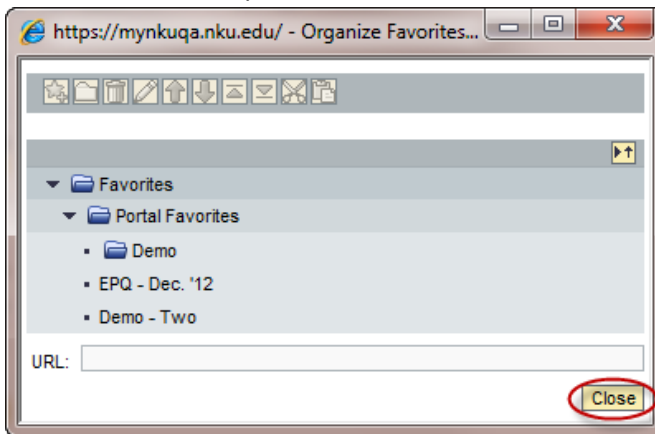
**NOTE:** Users may select  (Collapse All) to quickly hide the displayed list of favorites.



3. Selections for editing your saved reports are available on the toolbar. Utilize the buttons on the toolbar to:

<i>Button</i>	<i>Description</i>
	Adds a new link to favorites
	Creates a new favorites folder
	Removes the selected item
	Renames the selected item
	Moves the selected item up one position
	Moves the selected item down one position
	Cut a favorite item
	Paste a favorite item

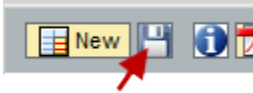
4. When edits are complete, select "Close."



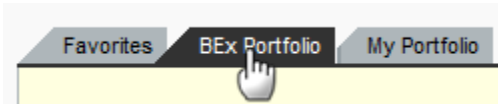
## BEx Portfolio

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:

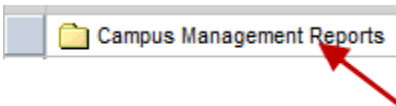
1. Click the **Save As...** button



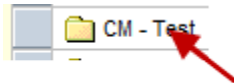
2. Select the **BEx Portfolio** tab.



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

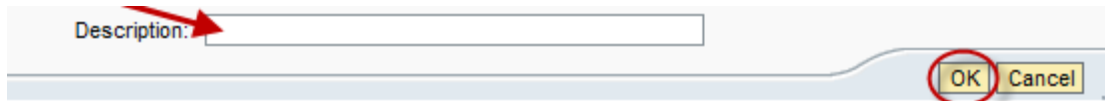


4. Select the department's folder.



**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**.

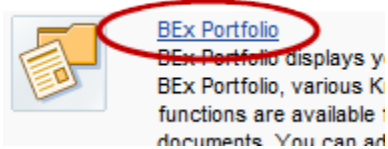


## Accessing BEx Portfolio:

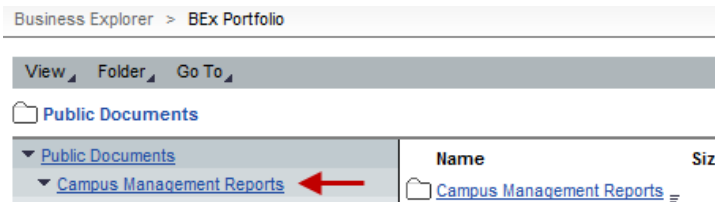
1. Click the **Business Explorer** tab.



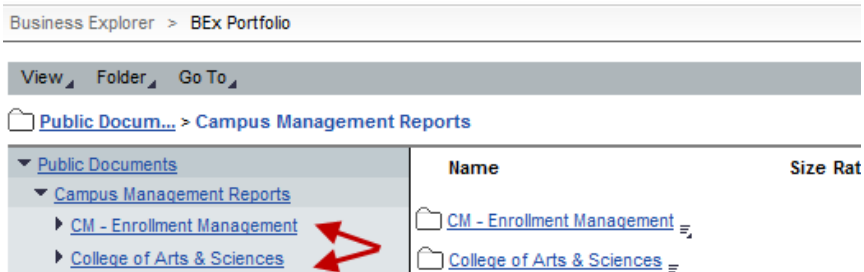
2. Click the **BEx Portfolio** link.



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

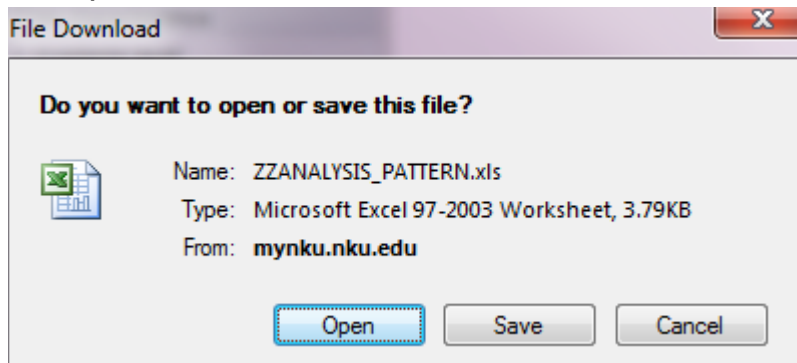
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Queries are formatted in BW in standard gray scale. To apply other formatting options, users may export data to Microsoft® Excel. Exporting allows users to apply color schemes, insert formulas, add comments, and complete numerous other tasks. When 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

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### 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.

<b>A General information</b>		<b>B Static Filters</b>	
Query Technical Name	ZCM_E_ZHE_IS45_Q007	Academic Session	Spring
Query Description	NKU Registrations / Enrollm	Academic Year	2011 2010-2011
InfoProvider Technical Name	ZHE_IS45	Transferred Credits	Not Transferred
InfoProvider Description	NKU Current Enrollment	Registration Status	Booked
Last Data Update	02/14/2011 06:49:46	Organizational Unit	Communication
Key Date	01/10/2011	Privacy Level	!NKU Duplicate Record W&
Created By		<b>C Dynamic Filters</b>	
Last Changed By		Transferred Credits	Not Transferred
Changed at	10/25/2010 08:06:16	Key Figures	Total Enrollments
Current User			Attempted Credits
Last refresh	02/14/2011 12:10:03		Student Count
Web Template	ZZANALYSIS_PATTERN	<b>D Variables</b>	
System	SAP_BW		

**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

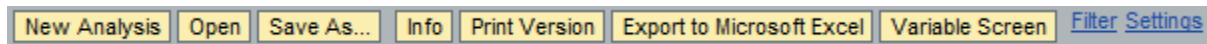
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### *The Business Warehouse Toolbar*

The illustrations below provide detail related to the Business Warehouse toolbar and page navigation prior to **Monday February 20<sup>th</sup>, 2012**. This information is specific to saved reports accessed via [Portal Favorites](#) or [BEx Portfolio](#) before Monday February 20<sup>th</sup>, 2012.

**A** NKU Registrations / Enrollments (Generic)      **B** Last Data Update: 02/24/2011 06:47:45

- 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.*



New Analysis   Open   Save As...   Info   Print Version   Export to Microsoft Excel   Variable Screen   Filter   Settings

<i>Button</i>	<i>Description</i>
New Analysis	Launch a new report
Open	Open a saved report
Save As...	Save a report for future reference
Info	Access detailed information about the query <a href="#">See Appendix A</a>
Print Version	Print the open report
Export to Microsoft Excel	Send the report to Microsoft® Excel
Variable Screen	Open the Variable Entry Screen
Filter	Open the Filter Options
Settings	Open the Settings Options