

2012

SAP Business Intelligence (BI) Reporting


Navigation Manual




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PASSHE
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Portal Access

BI version 7.0 reports are published on the portal for easy access. To access your BI reports via the portal, simply logon to the portal as you would to access ESS, for example.

1. Click on the Business Intelligence tab.
2. Click on the Campus Reports tab. (Tab names may vary based on authorizations and roles)
3. Click on a report link to open it in a new window. Some users may see subfolders at this level as well.

Welcome BI 10CampusTest **Pennsylvania State System of Higher Education** [Log off](#)

Home **Business Intelligence** 1

Campus Reports 2 | Accounting & Finance | Budgeting | Human Capital Management | Purchasing | Position Budget Management | Manage Saved Views | BI Message Administration

Overview History Back Forward

Detailed Navigation

- Overview 3
- Award Report
- Budget Report
- Purchasing & Procurement
- Vendor Number

Messages & Announcements

BI7 Training Daes

New BI 7.0 Budget Report. Use to view Budget, Actual, and Commitment Information.

System Status

System Online

University Contacts

Budget Office

This class is intended for users who have not previously used BI or those who would like a



If you don't see the Business Intelligence tab or the one which designates your functional area (Ex. Accounting & Finance), you do not have the appropriate Active Directory Group assigned to you. Please note, portal roles vary for each person. Your portal layout may differ from the screen shot.

Variable Entry Screen

After clicking on the report link, a Variable Entry screen will usually appear before the report runs.

Variables allow the user to change the report criteria before execution. Use caution, variables determine the data you will see. Generally, analytical reports have more flexibility by giving the user more variables. This also adds risk and requires the user to have a better understanding of the data. Finished reports, in contrast, have no or fewer variables and are more restricted at the query design level.

Variable Entry

Available Variables: [Dropdown] Save Save As... Delete Show Variable Personalization

Variable	Current Selection	Description
* Fiscal Year	2012	2012
Fund Hierarchy		
Fund (Multiple or Single)		
Funds Center (Budget Group)		
Funds Center (Multiple or Single)		
Commitment Item Hierarchy		
Commitment Item (Multiple or Single)		
Functional Area Hierarchy		
Functional Area (Multiple or Single)		
User ID (Multiple or Single)		
User Name (Multiple or Single)		

OK Check

If a Variable has an asterisk to the left of the description, it is required. You must enter a value before running the report. This is often done for time variables to limit the amount of data and reduce run time.

There are different types of variables. Some allow ranges, some only allow a single value, and some will allow the user to enter multiple values.



Screen shot of a typical budget report. Variable screens vary by report.

Tab Layout

BI reports are typically bundled into a tab layout. The variables entered when the report is executed are applied to all tabs.

To navigate from tab to tab, click on the appropriate tabs. Please note that a user should click one time only. BI will display a processing wheel until processing is complete.



In some cases, time variables may not apply to certain tabs. For example, trend tabs may automatically display 5 years, for example, and ignore any time variable entered by the user.

For most reports, tabs are arranged in a logical order. Summary or high level data is typically first followed by more detailed or specific tabs. Specialty tabs, like Trends, can be found at the end.

Shippensburg SH Summary

Last Data Update: 06/20/2012 06:06:31

Funds Center

Fund, Funds Center, Commitment Item, Fiscal Period, Item Category

Show All Values, Show All Values, Show All Values, Show All Values, Expenses & Transfers

Variable Filter

Fiscal Year 20

Expenses & Transfers

	Current Budget	Commitments + Actuals	Actuals	Commitments + Actuals	Remaining	Remaining
Funds Center	\$	\$	\$	\$	\$	%
6511100000 President's Office						
6511100010 University Related						
6511101000 Dir-Pub Rel/Events						

Query Description and Last Update

- A. For each tab selected, the description of the query will display. The query provides the underlying data for the report.
- B. The Last Data Update date and time will also display on the information bar. This is the day and time the SAP BI reports were last updated with SAP transaction or master data. Keep this date and time in mind when viewing BI reports. Remember, BI is a reporting platform and does not contain real-time data.

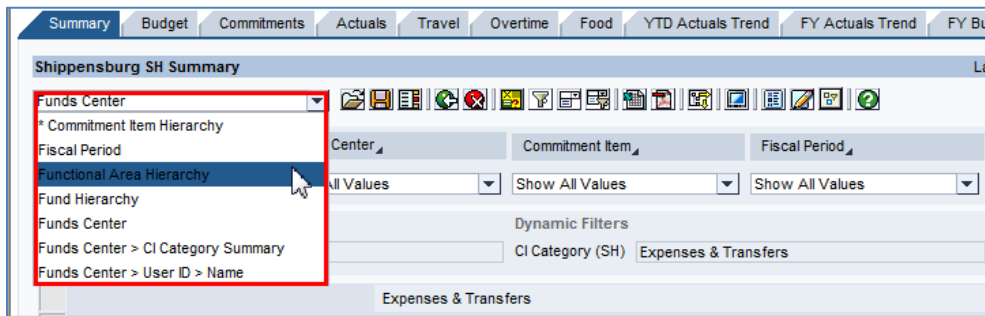
Summary Budget Commitments Actuals Travel Overtime Food YTD Actuals Trend FY Actuals Trend FY Budget Trend Payments Dashboard

Shippensburg SH Summary **A**

Funds Center

B Last Data Update: 06/20/2012 06:06:31

Global Views



The default view is typically designated by an asterisk * before the view description.

Each tab may contain multiple views in a dropdown list. Simply click on the dropdown arrow to display a list of views built on the query. Click on the desired view and wait for the screen to refresh with the new view. The views are typically other navigational states of the same data but may also contain specific filters or conditions.

The view dropdown list contains global views – available to all who use the report.




Each view selected will reset dynamic (tab specific) filters.

Toolbar Button Icon Legend

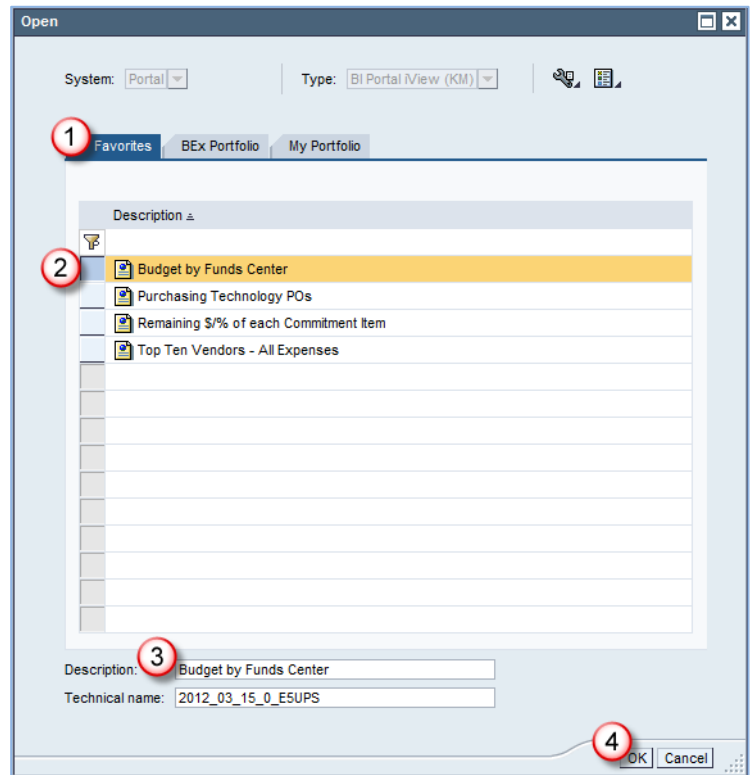


- A. OPEN - Access and open any previously saved user-defined views.
- B. SAVE - Save a user-defined View after implementing formatting and criteria changes.
- C. BOOKMARKING – Save a link to your browser’s favorites or copy a link to your clipboard.
- D. UNDO - Undo last navigation change. Each click will back out another step / change. Allow time for each screen refresh.
- E. RESET - This will undo all user navigation, filter changes, and return the view to the way it was delivered.
- F. VARIABLE SCREEN - This will return the user to the Initial Variable Screen to change his or her selections.
- G. FILTERS DISPLAY – Hide/Display Variable (report-wide) and Dynamic (tab only) Filter Values. The report defaults to display variable and filter values.
- H. DROPDOWN FILTERS & MENUS – Hide/Display fast filter dropdowns and menus. The report defaults to display fast filter dropdowns and menus.
- I. FILTER PANE - This will allow the user full access to apply / remove filters on the data. Toggle on / off.
- J. EXCEL - This will allow the user to export the current view to Excel for further processing.
- K. PDF PRINT - This will convert the current view to a pdf format to allow the user to either print the view or save the pdf file.
- L. NAVIGATION PANE - This will allow the user full access to the building blocks of the current view. Toggle on / off.
- M. FULL WINDOW VIEW - Open the report detail or chart in a full window to aid scrolling.
- N. PROPERTIES - This will display the properties of the current view. Toggle on / off.
- O. DOCUMENTATION - Access the report documentation and/or tab specific notes.
- P. ADVANCED OPTIONS - Gives users the ability to activate/create exceptions and conditions, save global views, create/edit a report broadcast, export with various formatting options, and/or display system messages. Toggle on / off.
- Q. NAVIGATION MANUAL – Provides a link to the general navigation manual surrounding BI.


Open Saved User-Defined Views

Click on the Open User Defined Views icon on the toolbar  to open the views you had previously saved.

1. Your user-defined views can be found on the Favorites tab of the Open dialog box.
2. Click on the view you want to open.
3. You will notice after clicking on the view the description will appear. Verify you have the correct view selected. You can ignore the technical name. Click the OK button to open the view.
4. After clicking OK, you may be prompted to enter variables. Your current report will then be replaced with the user-defined view you selected.



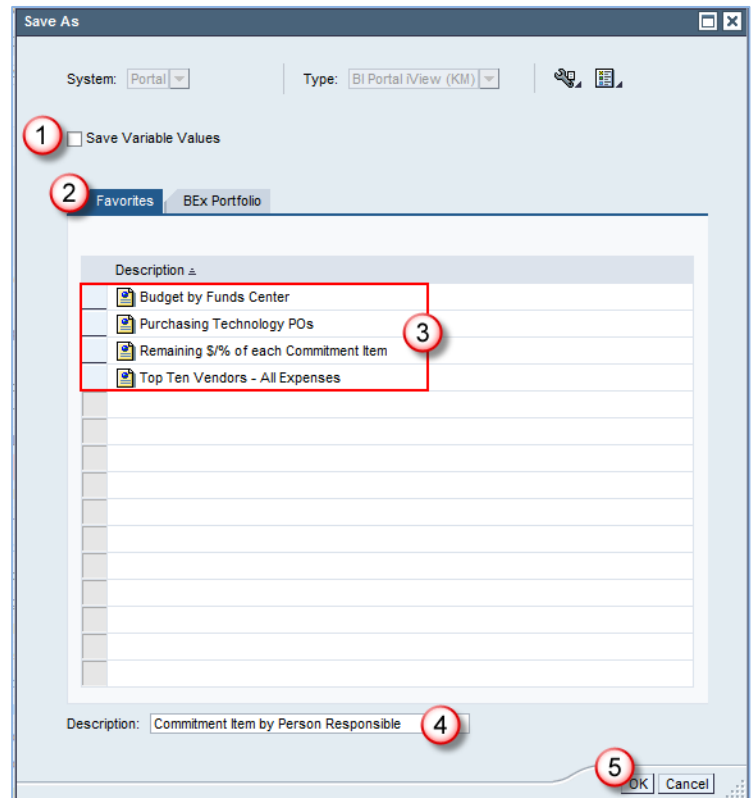
Save User-Defined Views

After making navigational and/or filter changes to a report, you may wish to save those changes for future reference. Saved Views can save considerable time. Click on the Save User-Defined Views  icon on the toolbar to create a new user-defined view.

1. The Save Variable Values will be checked by default. Uncheck this box before saving.
2. On the Favorites tab...
3. You will notice all the views you have saved. You can click on one to overwrite it (with the same name) or double-click on a folder to save in a folder.
4. Type the Description of your view.
5. After typing the Description, click OK to save the user-defined view.



Folders can be created to organize your "Favorite" views. Go to the Manage Saved Views tab under Business Intelligence on the portal.



Manage Saved Views – Open Views on the Portal

The Manage Saved Views tab on the Business Intelligence menu will be used for two purposes. It will enable a user to directly access a personal view they have created. These views will appear in the “Favorites” folder. Additionally, the portal is the only place a user can delete his or her personal views. Other users will not be able to see your personal views so feel free to create as many as necessary to meet your reporting needs.

To open a view from the Business Intelligence>Manage Saved Views tab, simply click on the view link. The report will run on the home page of the portal.

Open Personal View on **Manage Saved Views** of Portal vs. **Open Folder** on Reports

Manage Saved Views Tab

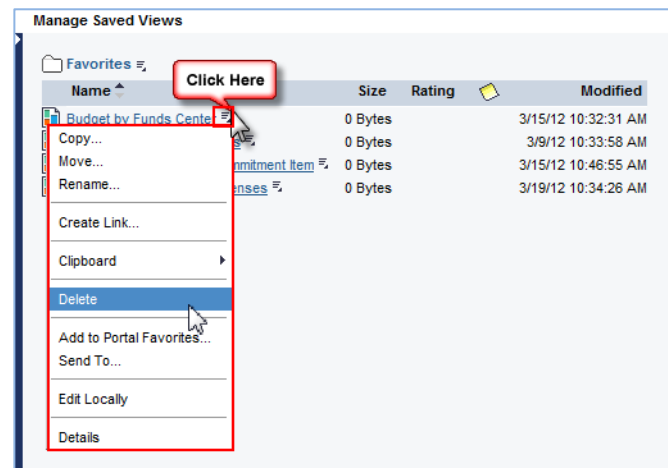
- Views can be deleted and renamed
 - Folders and subfolders can be created to organize favorites
 - Variables are not called. Report runs with saved variables
 - No working wheel is displayed
- The saved view opens on the Home page of the portal

Open Folder on Report

- Views cannot be deleted or renamed
 - Folders and subfolders cannot be created
 - Variables are called and can be changed prior to execution
 - A working wheel is displayed showing the report is running
- The saved view opens in the same window as the current report

Managed Saved Views – Delete Views on the Portal

To delete a view, click on the context menu icon to the right of the view name and select delete from the context menu. This will only delete your personal view and will not affect others.



Bookmarking / Favorites

After clicking on the bookmark button, you have the option to **Copy to Clipboard** or **Add to Favorites**

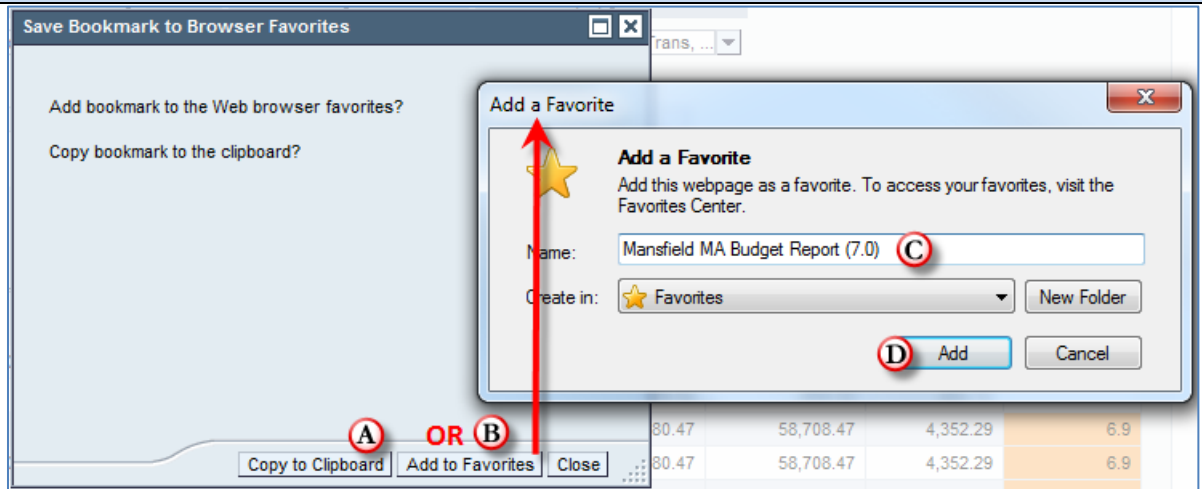
A. **Copy to Clipboard** will simply copy a URL to your computer's clipboard. You

will not see anything happen when you click this button. Instead, use the paste command (Ctrl+V) to paste the URL into an email or other document. You can also create a new shortcut and paste the URL in the shortcut location field. You could, for example, create shortcuts on your desktop or network folder to predefined BI reports.

B. **Add to Favorites** will allow you to add the bookmark URL to your browser's favorites. After clicking on the Add to Favorites button, the Add a Favorite dialog box will appear.

C. Simply change the name to whatever you would like to call your favorite and


D. Click the Add button. It will now be listed with your other favorites.



Bookmark vs. Saved Views

Bookmark	Saved Views
<ul style="list-style-type: none"> • All Variable values are saved • Generates URL that is saved as a favorite <u>locally</u> on your browser • Only available on the PC where the bookmark was created (unless the bookmark link is saved elsewhere) • You can bookmark the same report multiple times with different variables, navigation states, tab displays, etc. • Bookmarks are easy to share 	<ul style="list-style-type: none"> • Variable values are not usually saved with the view. Views will save the report, tab, navigation state, and dynamic filters but will typically not save variables. The view can apply to any set of variables. • You use your portal ID to access views. BW logon not needed • Views are saved on the <u>BI server</u> • Views are available on any computer • User-defined views cannot be shared with others

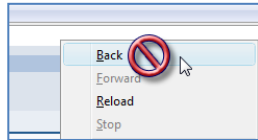
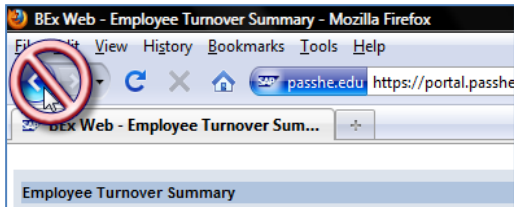
Undo

Click on the Undo icon  to undo your last navigation or filter. Each time you click the Undo button you will undo one step. You can click multiple times to undo multiple steps but you must wait for the screen to refresh after each click.



DO NOT use your browser's back button or your browser's context menu back button.


Browser Back Button and Context Menu Back Button




BI Toolbar Button



Reset

Clicking the Reset  button will remove all navigation steps and return the report to the original navigational state. It will also remove any dynamic filters that were added since the report was executed.

Filters Display

- Variable Filters:** This will display the variable values entered when you ran the report.
- Dynamic Filters:** This will display any filtering done on the current tab. Dynamic filters only apply to the tab you are viewing while Variable Filters are the same for all tabs.
- To hide the display of the Variable and Dynamic filters, toggle the  icon. Hiding the filter values will give you more screen area for the data but you may lose track of the filters on the data you are viewing.

Fast Filters - Dropdowns

Each tab may contain a filter dropdowns with a list of values. For example, if you run the report for multiple Commitment Items you can simply select a single subgroup from the dropdown. After making a filter selection, the screen will refresh to display data for the single filter value.



Selecting a different view will reset all dynamic filter values.

Selecting a filter from a dropdown menu will only filter that tab. Only variables restrict all tabs.

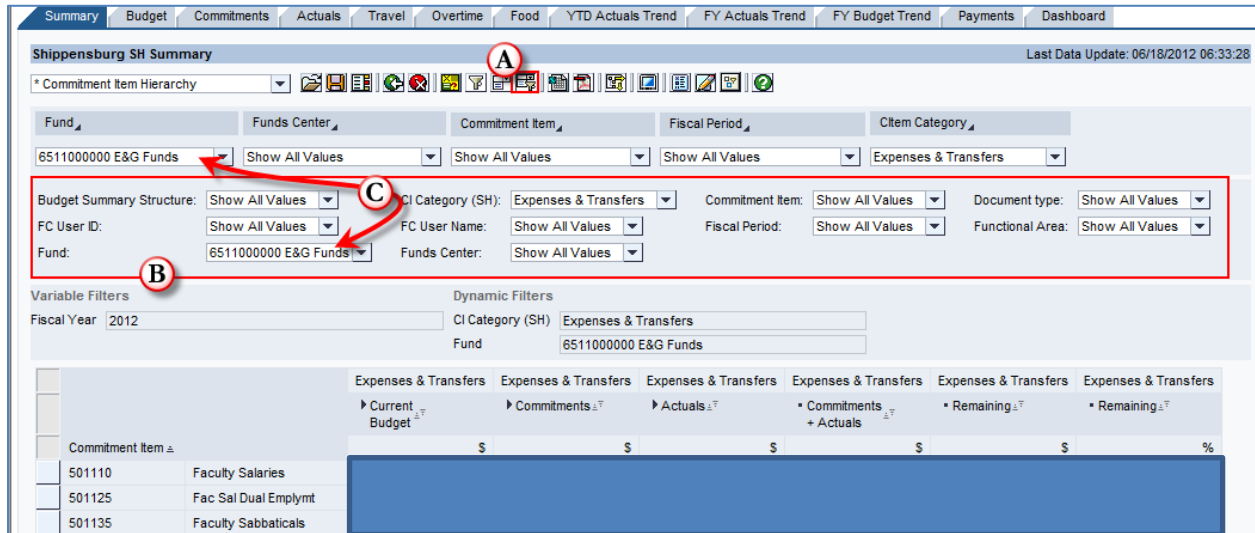
Fast Filters - Menu

The description text of each Fast Filter dropdown box is also a menu of common actions. For example, you could quickly change the Display settings (Key and Text), Sort (Key or Text), Activate/Deactivate Hierarchies (if available), Display or Hide Results Rows, Add or Remove the characteristic in drilldown, open a filter dialog box, Clear Filter values on the characteristic, or call the dialog box that displays all the characteristic's properties.

Filter Pane

Click on the Filter Pane toolbar button to display the Filter Pane above the data table. The Filter Pane will allow you to add or remove a filter on any characteristic or key figure.

- Click on the Filter Pane button. The button is a toggle – click on again to hide the Filter Pane.
- The Filter Pane will appear above the data table, specifically below the Fast Filters. All Characteristics and Key Figures will be displayed as dropdown boxes for filtering.
- If you used a Fast Filter dropdown, notice the same Fast Filter dropdown filter values can be found in both the Fast Filter and the Filter Pane.



Filter Pane vs. Fast Filters

Filter Pane

- All Characteristics and Key Figures in the query are displayed
- Drag-and-drop functionality
- Must open dialog box in most cases to filter – values not listed directly in dropdown
- The characteristics or key figure description is text only
- Can select multiple filter values with the dialog box

Fast Filters

- Only commonly used Characteristics and/or Key Figures are displayed
- No Drag-and-drop functionality
- Available filter values display in dropdown box
- The characteristics or key figure description is a menu of commonly used commands
- Can only select one filter value at a time

Filter Pane - Dialog Selection

1. The Filter Pane will display above the data table with all available characteristics and key figures.
2. To filter on a characteristic (Commitment Item in this example) select Edit from the dropdown box.

3. A new dialog window will open for the characteristic selected.
4. Find the value(s) you want to include (or exclude) in your filter and select the value(s) by clicking on the block to the left.
5. After making your selections, click on the **Add** button to move values to the **Selections** table on the right.
6. After clicking the **Add** button, the added values will display on the **Selections** table.

7. You can also exclude values by selecting the value and clicking the red square to exclude the value (Note: not all characteristics will have the exclude option).
8. When complete, click the OK button to transfer the filter.

9. After clicking the OK button to transfer the filter values, the dropdown will display the filtered value.



A “!” before the value indicates the value is **excluded**.

Filter Pane - Drag and Drop

Instead of using the filter dialog box to select filter values, you can also drag and drop values to restrict or exclude them from the results, depending on the “drop” location.

To filter or restrict to a single value, click on the value and drag-and-drop it onto the Filter Pane. The Filter Pane will highlight in teal when you hover over it with the selected value.

Drop on Filter Pane and wait for screen to refresh.

Budget Summary Structure: Show All Values | CI Category (SH): Expenses & Transfers | Commitment Item: Show All Values
 FC User ID: Show All Values | FC User Name: Show All Values | Fiscal Period: Show All Values
 Fund: Show All Values | Funds Center: Show All Values

Variable Filters: Fiscal Year 2012 | Dynamic Filters: CI Category (SH) Expenses & Transfers

	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers
	Current Budget	Commitments	Actuals	Commitments + Actuals
	\$	\$	\$	\$
599500 Other Empl Fee Wvr	225.00		71,035.20	71,035.20
599581 RA/Grad Dir Hsng Wvr			38,210.00	38,210.00
599582 RA/Grad Dir Ding Wvr			67,779.00	67,779.00
605110 Postage	530,339.03	93,666.89	394,766.72	488,433.61
606110 Local Telephone Svc	132,329.18	37,671.68	49,789.51	87,461.19
606115 Long Dist Tele Svc	18,674.89	2,386.98	2,819.36	5,206.34
606130 Tele Equip Install	27,538.23	2,273.53	17,718.55	19,992.08
606140 SSHEnt Charges	297,651.87	103,982.63	192,924.83	296,607.46

Commitment Item: Postage
 Fiscal Period: Show All Values

Expenses & Transfers

Current Budget

Commitment Item	\$
605110 Postage	530,339.03

After dropping the value onto the Filter Pane, you will notice the data table will display only the single value and the Filter Dropdown on the Filter Pane will also indicate there is a filter.



The Filters tab will always display all dynamic filter values.

To **Exclude** a value from the data, click on the value and drag-and-drop it off the table until you see the by the cursor indicating the value is going to be excluded. A “!” before the value in the Filter Pane indicates the value is excluded.

Commitment Item: !Long Dist Tele Svc



If you drag off a characteristic description, it will remove it from the drilldown, not exclude any values.

Budget Summary Structure: Show All Values | CI Category (SH): Expenses & Transfers | Commitment Item: Show All Values | Document ID: Show All Values
 FC User ID: Show All Values | FC User Name: Show All Values | Fiscal Period: Show All Values | Fund: Show All Values
 Fund: Show All Values | Funds Center: Show All Values

Variable Filters: Fiscal Year 2012 | Dynamic Filters: CI Category (SH) Expenses & Transfers

	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expense
	Current Budget	Commitments	Actuals	Commitments + Actuals	Remain
	\$	\$	\$	\$	\$
598583 RA/Grad Dir Tut Wvr			71,035.20	71,035.20	
599500 Other Empl Fee Wvr	225.00		38,210.00	38,210.00	
599581 RA/Grad Dir Hsng Wvr			67,779.00	67,779.00	
599582 RA/Grad Dir Ding Wvr			139,345.00	139,345.00	
605110 Postage	530,339.03	93,666.89	394,766.72	488,433.61	
606110 Local Telephone Svc	132,329.18	37,671.68	49,789.51	87,461.19	
606115 Long Dist Tele Svc	18,674.89	2,386.98	2,819.36	5,206.34	
606130 Tele Equip Install	27,538.23	2,273.53	17,718.55	19,992.08	

Filter & Navigation Pane – Filter and Drilldown with Drag and Drop

Initial state of the BI interface. The 'Commitment Item' dropdown is set to 'Show All Values' (C). The 'Navigation Pane' on the left shows a tree structure with 'Fund' selected (A). The 'Long Dist Tele Svc' characteristic is highlighted in the table (B).

Commitment Item	Current Budget	Commitments	Actuals
598583 Ra/Grad Dir Tuit Wvr			71,035.20
599500 Other Empl Fee Wvr	225.00		38,210.00
599581 RA/Grad Dir Hsng Wvr			67,779.00
599582 RA/Grad Dir Ding Wvr			139,345.00
605110 Postage	530,339.03	93,666.89	394,766.72
606110 Local Telephone Svc	132,329.18	37,671.68	49,789.51
606115 Long Dist Tele Svc	18,674.89	2,386.98	2,819.36
606130 Tele Equip Install	27,538.23	2,273.53	17,718.55
606140 SSHENet Charges	297,651.87	103,982.63	192,924.83
607100 Advertising	686,455.61	211,494.54	428,195.52

Using the Navigation Pane, or Filter Pane, you can filter and drilldown in a single step.

- Left-click and hold on the characteristic in the Navigation or Filter Pane.
- Drag the characteristic onto the data table and drop it on the value you would like restricted.
- Notice in the example, Commitment Item has no restrictions prior to Fund being dropped onto a Commitment Item value, such as Long Dist Tele Svc.
- After releasing, the characteristic moved from the Navigation or Filter Pane will appear in the rows.
- Additionally, you will notice the characteristic value that the new characteristic was dropped on now shows up in filter restrictions.

Result of the drag-and-drop action. The 'Commitment Item' dropdown is now set to 'Long Dist Tele Svc' (E). The 'Navigation Pane' shows 'Fund' selected (D). The table now only displays rows for 'E&G Funds' and 'Comp Health Fund'.

Fund	Current Budget	Commitments	Actuals
6511000000 E&G Funds			
6513000500 Comp Health Fund			
Overall Result			

By following these steps, you can easily filter and restrict with a single drag and drop action.



Remember, this action can be performed from the Filter Pane and the Navigation Pane.

Hierarchies - Overview

Hierarchies group characteristic values together for reporting purposes. The layout of a hierarchy is similar to a folder and subfolder structure. Lower levels of a hierarchy roll up into higher levels creating subtotals at defined levels.

Some hierarchies are created in the SAP transactional system and transferred to BI every night, like BCS Groups and PASSHE's standard commitment item hierarchy. Other hierarchies are created and maintained directly in BI and are only available in BI for reporting, such as hierarchies created on Fund, Vendor, PO, Fiscal Period, etc.

PASSHE Standard Commitment Item Hierarchy **Active**

Commitment Item Σ		\$
▼ COMMITMENT ITEM HIERARCHY	COMMITMENT ITEM HIER	30,836,287.26
▼ 2-EXPENSES	Expenses	18,859,640.05
▼ NON-PERSONNEL	Non-Personnel	18,859,640.05
▼ OPERATING	Operating	18,084,082.16
▶ UTILITIES	Utilities	3,582,744.56
▶ LEASES-REAL_ESTATE	Leases-Real Estate	155,518.13
▶ STUDENT_AID	Student Aid	1,582,844.00
▼ OTHER_EXPENSES	Other Expenses	12,762,975.47
▶ 605	Postage/Freight	102,350.92
▶ 606	Telecom Charges	704,137.45

Hierarchy **Deactivated** for Commitment Item

Commitment Item Σ		\$
605100	Postage/Freight/Ship	150.00
605110	Postage	80,707.71
605130	Freight/Shipping	21,493.21
606100	Telephone & Telecomm	6,280.00
606110	Local Telephone Svc	118,562.37
606115	Long Dist Tele Svc	28,788.27
606120	Telecomm Leases	150.00
606125	Telephone Line Rent	14,640.00
606130	Tele Equip Install	7,380.00

Hierarchies contain nodes that can be open/expanded or closed when you click on the node symbol. When all the hierarchy nodes are expanded, you will see the individual characteristic(s). The characteristic values are the leafs of the hierarchy tree and cannot be expanded.

Hierarchies for Common Characteristics

Fund – Every university has the ability to roll funds up in a hierarchy similar to their application of funds. For example, all E&G funds (xx11xxxxx) can quickly and easily be selected or displayed. Similarly, all Restricted Grants, for example, can be filtered or displayed.

Funds Center – Funds Center hierarchies are available to every university as well. Most use the BCS Group as defined in SAP but others have custom Funds Center hierarchies.

Commitment Item – BI users can select from several Commitment Item hierarchies. Every university will have the PASSHE standard CI hierarchy. Many have custom “pool” and “line” hierarchies as well and there is even a commitment item hierarchy for a BUDRPT view for the budget office.

Account - In accounting reports, a hierarchy on account can be activated to group accounts into the standard PASSHE commitment item hierarchy for revenue and expenses. Assets and liabilities are also grouped on account hierarchies.

Fiscal Period – Hierarchy activation will group periods into quarters and half. Some fiscal period hierarchies will put SPO into July.

Vendor – Vendors can be grouped by APAY, employee, university, one time, etc.

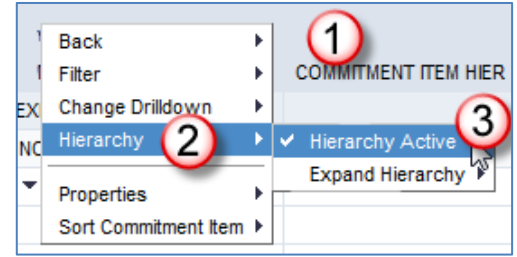
PO Number – PO Number hierarchy will group PO numbers by the type of PO (Standard, Contract, Rush, etc.)

Hierarchies – Activate and Deactivate

Context Menu

You can activate or deactivate a hierarchy several ways.

1. Right-click on the characteristic with the active/deactivated hierarchy
2. From the context menu, select:
3. Hierarchy Active to toggle the state. The ✓ on the context menu indicates the hierarchy is currently active.



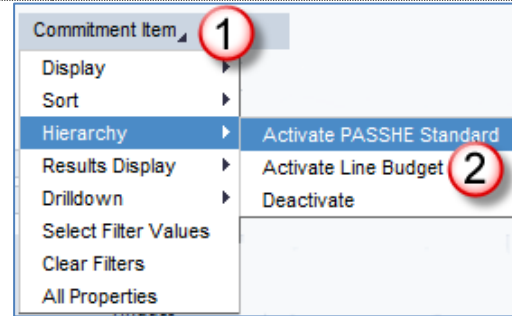
This action will activate the default hierarchy only. You cannot select from a list of possible hierarchies.

Fast Filter Menu

If there is a Fast Filter menu for your characteristic...

1. Click on the menu item (commitment item in this example)
2. Select the Hierarchy to activate from the menu

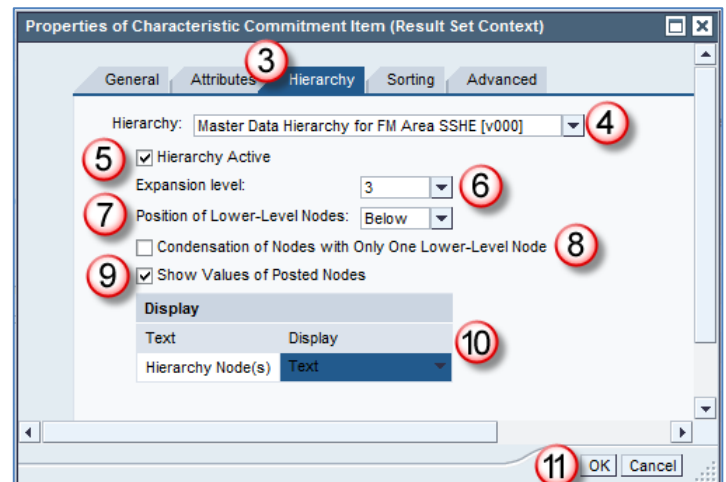
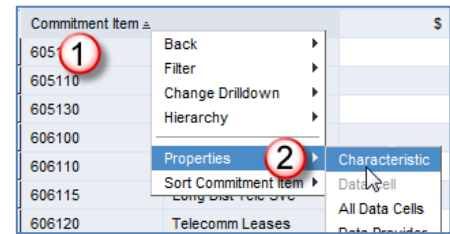
Some may have multiple hierarchies to select. Most will only have an Activate or Deactivate option. In this example, there are three possible hierarchies to activate for Commitment Item. Each will group and subtotal commitment items differently.



Properties>Characteristic

You can also activate the hierarchy, and many other options, from the characteristics' properties window.

1. Right-click on the characteristic to bring up the BI context menu
2. From the context menu, select Properties>Characteristic to open the properties dialog box for the selected characteristic
3. On the Hierarchy tab...
4. You can pick from all the available hierarchies
5. Activate or Deactivate
6. Select a level to expand all nodes
7. Position the hierarchy to roll up or roll down (subtotals above or below the lower levels)
8. Hide a node if there is only a single node below it. This saves space but can produce a confusing output for some.
9. If a node has a rollup value and a posted value (not typically done) you can check this box to see the posted and rollup values as two separate nodes. The nodes can display text and or the key. You can show the text for the hierarchy and still display the key and text for the characteristic (on the General tab).
10. OK to transfer settings



Multiple Ways to Activate a Hierarchy

Context Menu	Fast Filter Menus	Properties>Characteristic
<ul style="list-style-type: none"> • Simple right-click on characteristic • Only <u>one</u> hierarchy (query default) is available • Available on all characteristics 	<ul style="list-style-type: none"> • Simple click on fast filters menu item • <u>Multiple</u> hierarchies (but not all) <i>may</i> be available • Available on some characteristics 	<ul style="list-style-type: none"> • Multiple steps required • <u>All</u> hierarchies are available, even those created for other universities • Available on all characteristics • Many other hierarchy settings available

Hierarchies - Expand and Collapse

You can expand or collapse hierarchy nodes one at a time or quickly expand to a set level. To expand a node simply click on the node symbol ▶. When expanded, the symbol will turn to a down (or up if lower levels are set to above) symbol ▼, indicating it is expanded. Hierarchy nodes will always display an expanded or collapsed icon. When the hierarchy is fully expanded, the individual characteristics will display a bullet • symbol.

▼ 2-EXPENSES	Expenses	18,859,640.05
▼ NON-PERSONNEL		18,859,640.05
▼ OPERATING	Operating	18,084,082.16
▶ UTILITIES		3,582,744.56
▶ LEASES-REAL_ESTATE	Leases-Real Estate	155,518.13
▶ STUDENT_AID	Student Aid	1,582,844.00
▼ OTHER_EXPENSES	Other Expenses	12,762,975.47
▶ 605	Postage/Freight	102,350.92
▶ 606	Telecom Charges	704,137.45
▶ 607		334,192.64
▶ 608		17,131.00
▶ 609	Memberships	268,472.21
▶ 610	Printing & Duplicati	178,022.38

Open Node

Closed Node

Result of lower

▼ OTHER_EXPENSES	Other Expenses	12,762,975.47
▼ 605	Postage/Freight	102,350.92
• 605100	Postage/Freight/Ship	150.00
• 605110	Postage	80,707.71
• 605130	Freight/Shipping	21,493.21

Fully expanded hierarchy - displaying actual characteristic values. There is no node at this level and the hierarchy tree cannot be

If you want to expand multiple nodes, use the context menu to expand the hierarchy to the desired level. Right-click on the characteristic name, then select Hierarchy>Expand Hierarchy>Level 0x.

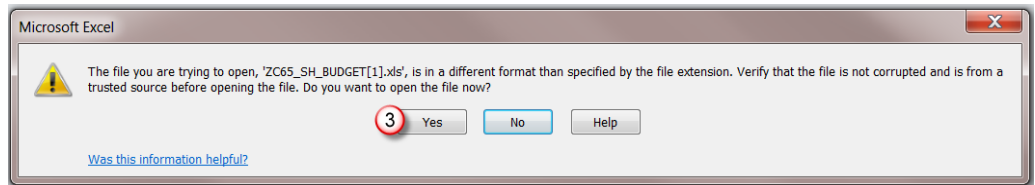
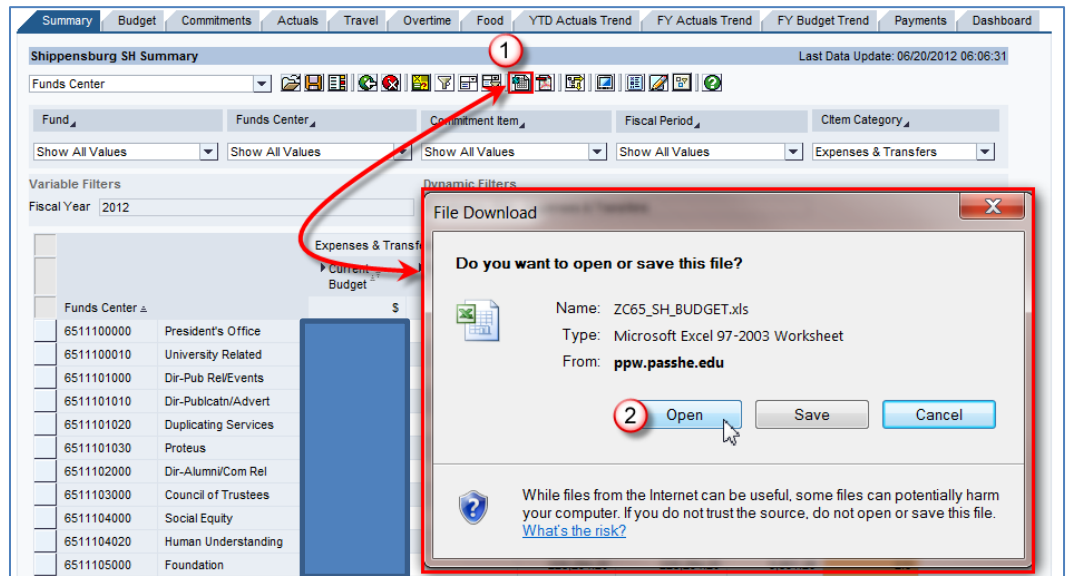


You can also expand levels of only a single node without expanding the other nodes of the hierarchy. To expand all lower levels of a single node, simply right-click on the node (not the characteristic name) and select Hierarchy>Expand Hierarchy>Level 0x from the context menu.

Commitment Item		\$	\$	\$
▼ Overall				
▼ Operat				
▶ Oper				
▶ Capi				
▼ Trans t				
▶ Trans to/from Plant				
▼ Chargebacks				
▶ Chargebacks				

The Excel  button can be used to easily export the data table to Microsoft Excel.

1. Click on the Export to Excel icon button.
2. A new dialog box will open. You can either save the file or open it. (Note: This dialog box will vary depending on the web browser you use.)
3. If you Open the file, you may be prompted to allow the file to open – depending on your version of Excel and security settings. Click on **Yes** button indicating you trust the file.



Only values are transferred to Excel, not formulas for results rows. Consider removing result rows and/or deactivating hierarchies before exporting to Excel. Removing results first may also make sorting and other functions in Excel easier to perform.

- A. In Excel, the exported data will display first in rows, the description of the query and the last update date and time.
- B. Variable Values and Dynamic Filters will appear above the data table.
- C. The data table will be exported in the format it was displayed in the BI web application. Rows with the same data will repeat automatically when exported to Excel.

ZC65_SH_BUDGET[2] [Protected View] - Microsoft Excel


File Home Insert Page Layout Formulas Data Review View Add-Ins Acrobat

Protected View This file was opened from a potentially unsafe location. Click for more details. Enable Editing


A1 Shippensburg SH Summary

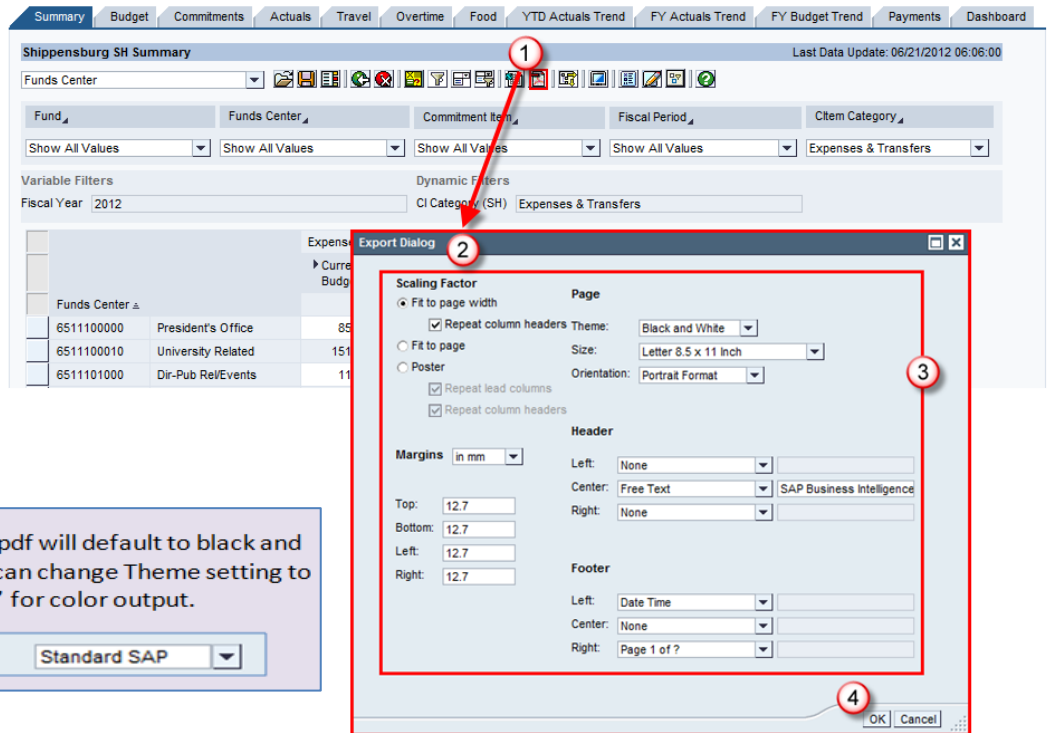
	A	B	C	D	E	F	G	H
1	Shippensburg SH Summary							
2								
3	Last Data Update:							
4								
5	06/20/2012 06:06:31							
6								
7	Fiscal Year	2012						
8								
9	CI Category (SH)	Expenses & Transfers						
10								
11			Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers	Expenses & Transfers
12			Current Budget	Commitments	Actuals	Commitments + Actuals	Remaining	Remaining
13	Funds Center		\$	\$	\$	\$	\$	%
14	5511100000	President's Office						
15	5511100010	University Related						
16	5511101000	Dir-Pub Rel/Events						
17	5511101010	Dir-Publicatn/Advert	694,935.00	200,120.00	150,233.40	1,002,424.00	541,120.00	30.1%




To remove result rows, right-click on the row and select Properties → Characteristic. Then choose 'Never' for the Display Results dropdown followed by OK. **OR** left-click on the row and drag until you see the  symbol, release the mouse button and the characteristic value will be restricted out of the data.

Create Adobe .pdf Document

1. Click on the PDF Print button  to open the...
2. Export Dialog box.
3. Make any desired setting changes. You can change from Black and White to color, change orientation (landscape or portrait), change margins, and even add text to the header or footer.
4. Click OK to complete export.



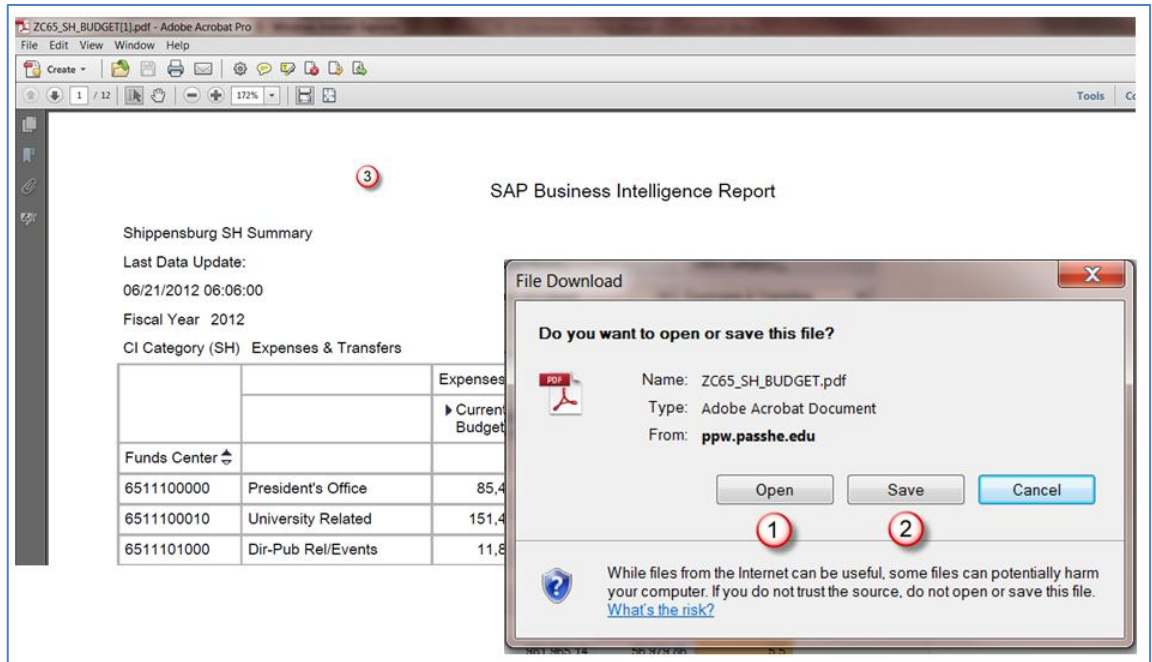
 The Export to .pdf will default to black and white but you can change Theme setting to "Standard SAP" for color output.

Theme:

Adobe .pdf Document

A File Download dialog box will prompt you to Open or Save the Adobe .pdf file.

1. Open will open Adobe Acrobat for future printing or saving.
2. Save will allow you to save the file for future reference. The formatted report is displayed.



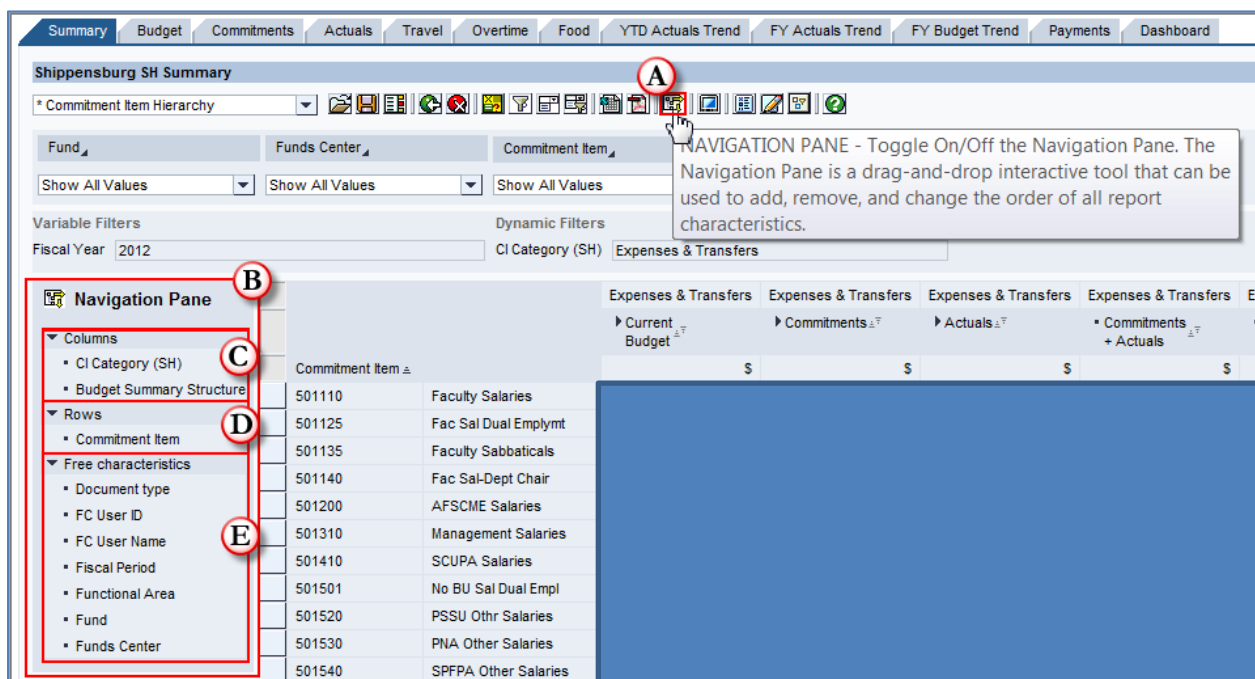
Funds Center	Description	Expenses
6511100000	President's Office	85,4
6511100010	University Related	151,4
6511101000	Dir-Pub Rel/Events	11,8

3. After exporting to Adobe .pdf, you will be able to **Print**, **email**, or **Save** the document for future reference. One of the new improvements to .pdf printing is that columns and/or rows headings will repeat for all pages.


Navigation Pane

Click on the Navigation Pane toolbar button to display the Navigation Pane to the left of the data table. The Navigation Pane will allow you to swap characteristics, add drilldown to rows or columns, and remove drilldown, as well as filter and drilldown.

- Click on the Navigation Pane button. The button is a toggle – click on again to hide Navigation Pane.
- The Navigation Pane will appear to the left of the data table.
- Columns – will display the data fields in the table columns. Typically, **Key Figures** (*quantitative* data like Current Budget, Commitments, Actuals, etc.) will be displayed in columns but **Characteristics** (*qualitative* data like Commitment Item, Document type, Functional Area, etc.) can be displayed in columns too.
- Rows – will display the data fields in the table rows. Typically, Characteristics (qualitative) data will be displayed in rows. There can be several data fields in rows.
- Free Characteristics – are the available data fields that can be added to the table's rows or columns. If you see the data field (Key Figure or Characteristic) here, it is available to add to the report. If it is not listed, it cannot be added. The Key Figures and Characteristics in the Navigation Pane are based on the query design and usually vary by tab. Detail tabs typically have more Free Characteristics available for drilldown.



The screenshot shows the 'Shippensburg SH Summary' report interface. At the top, there are tabs for Summary, Budget, Commitments, Actuals, Travel, Overtime, Food, YTD Actuals Trend, FY Actuals Trend, FY Budget Trend, Payments, and Dashboard. Below the tabs, there are filters for Fund, Funds Center, and Commitment Item, each with a 'Show All Values' dropdown. There are also sections for Variable Filters (Fiscal Year: 2012) and Dynamic Filters (CI Category (SH): Expenses & Transfers). The main area is divided into a 'Navigation Pane' on the left and a data table on the right. The Navigation Pane has three sections: 'Columns' (CI Category (SH), Budget Summary Structure), 'Rows' (Commitment Item), and 'Free characteristics' (Document type, FC User ID, FC User Name, Fiscal Period, Functional Area, Fund, Funds Center). The data table shows columns for Current Budget, Commitments, Actuals, and Commitments + Actuals, with rows for various commitment items like Faculty Salaries, Faculty Sabbaticals, etc. A tooltip labeled 'A' points to the Navigation Pane toggle button in the toolbar, with the text: 'NAVIGATION PANE - Toggle On/Off the Navigation Pane. The Navigation Pane is a drag-and-drop interactive tool that can be used to add, remove, and change the order of all report characteristics.' Other labels B, C, D, and E point to the Navigation Pane header, the Columns section, the Rows section, and the Free characteristics section respectively.

 If there is a specific characteristic that is not listed in the Free Characteristics and you think it would be valuable for reporting, please contact the [BI Team](#) with your recommendation.

Navigation Pane - Swap Key Figures/Characteristics

To swap (replace) one characteristic with another one, single-click on the characteristic you want inside the Navigation Pane (Fund in this example) and drag-and-drop it on top of the characteristic you want to replace.

Click and Drag

To replace one characteristic with another, simply drag-and-drop one over the other. You will know when the characteristic you want to swap is selected when it appears highlighted in teal.

Commitment Item	Value
605100	Postage/Freight/Ship
605100	Postage
605130	Freight/Shipping
606100	
606110	
606115	
606120	
606125	
606130	
606135	
606140	SSHENet Charges
606155	Cellular Phones

Fund was moved to rows and Commitment Item was moved to Free Characteristics after swap.

Fund	Value
1011000000	E&G General Funds
1012020002	Faculty Dev/Wellness
1012020003	
1012020004	
1012030001	Indirect Cost

Navigation Pane - Add Drilldown in Rows

To Add a Drilldown to rows, click on the desired characteristic to add from the list of Free Characteristics, drag until a dark line appears. The line will indicate the new location of the characteristic to be added. Release and wait for the screen to refresh.

The new free characteristic will be added to the rows.



You can remove characteristics by clicking on the characteristic you want to remove and dragging it to the Free Characteristic section of the navigation pane.

Click and Drag

To add a Drilldown, left-click on the characteristic, hold the mouse button, and drag it to the desired drilldown location. A dark line will appear to confirm the drilldown location. After the line appears, release your mouse button to add the drilldown.

Fund	Value
1011000000	E&G General Funds
1012020002	Faculty Dev/Wellness
1012020003	SCUPA Prof
1012020004	Off Campu
1012020009	Scber Room
1012030001	Indirect Cost
1012030002	Matching Fun
1012030003	Research an
1012030004	Spec Proj/Ma
1012040003	Pepsi Bonus
1012040004	Verizon Lic Agreemnt
1012040005	Integra College Grnt
1012060001	Unrestricted Grants

<< After dragging-and-dropping the characteristic onto the data table, you will see it display in the table as was as under the Rows in the Navigation Pane.

Fund	Value	FC Pers.Resp.Name
1011000000	E&G General Funds	10bvanders
1011000000	E&G General Funds	10cbrandon
1011000000	E&G General Funds	10dnovak
1011000000	E&G General Funds	10ebrennan
1011000000	E&G General Funds	10gmelnick
1011000000	E&G General Funds	10pbadolat
1011000000	E&G General Funds	10pwasko

Navigation Pane - Navigate within Pane

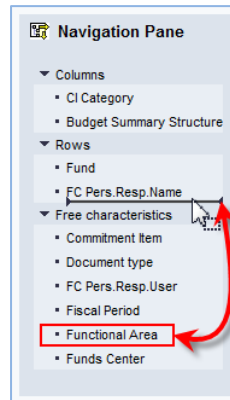
Instead of dragging-and-dropping on the data table, you have the option to drag-and-drop within the Navigation Pane. Some users find this method easier, especially if the data table is complex.

Simply left-click, hold, and drag the characteristic from the original location to the desired new location within the Navigation Pane.

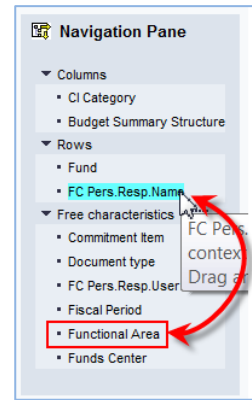


Remember, a solid line will insert and a teal highlight will swap.


Add Functional Area after FC Pers.Resp.Name



Swap FC Pers.Resp.Name with Functional Area



Full Window View





If your data list is very long, you may wish to open the data table in a full window. You will still have the ability to use the BI Context Menu but the other web items will be removed from the full window view. Simply click on the Full Window View button  to open a new window.

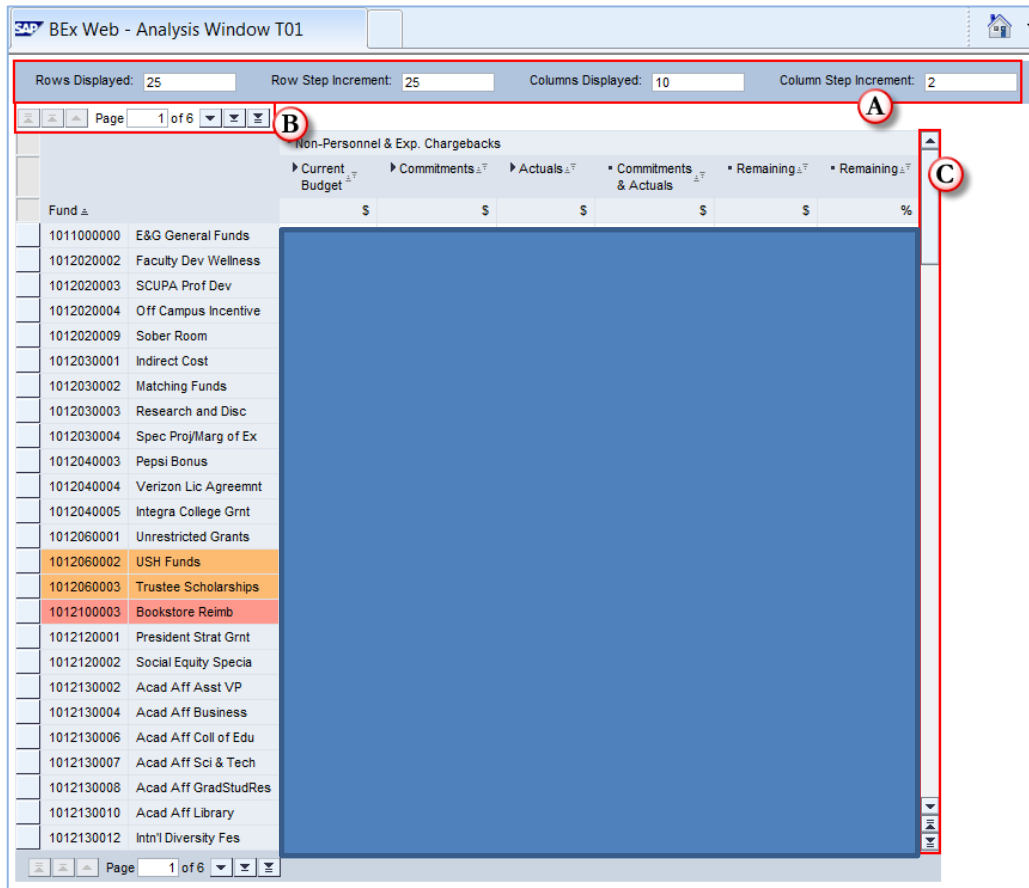


The Full Window screen will allow the user to set up the data table with scrolling that will “freeze” the data column headings.


There are several tools that will help maximize the display area and assist with scrolling while locking the column and row headings.

- You can adjust the display area by entering the number of rows and columns to display at one time. Simply enter a number and press Enter on your keyboard. You can set the rows and columns to a display area that best fits your computer’s screen size and resolution. The step increment settings will determine how many rows or columns are scrolled with each page. For example, you can display 15 rows at a time but only step through five rows with each click of the Next Page button.
- Use the scroll buttons to scroll through the data. Column and row headings will display with each step.
- You can also use the scroll bar on the right and/or bottom of the screen to scroll through pages.

Button	Action
	First Entry / Last Entry – The page will step to the start or end of the data table.
	Previous Page / Next Page – The page will step according to the step increment setting
	Previous Item / Next Item – The page will step by a single row at a time.
	Clicking in the open area of a horizontal or vertical scroll bar is the same as a Page step



Properties


Users have the ability to change the properties of many reporting objects by activating the properties pane. Click on the Properties button  to open the properties pane. (Click on Properties button again to hide the properties pane)

You can modify Table, Chart, All Data Cells, and Query properties.

1. For example, you may want to display text on every line, regardless if it is repeating.
2. Click on the Properties icon/button on the toolbar. The Properties Pane will display.
3. On the Table tab.
4. Check the “Display Repeating Text” checkbox.
5. Notice that every row will now display text, even if that text is the same as the row above.

The screenshot shows the 'Properties' pane for a table. The 'Table and Cell Properties' tab is selected. The pane is divided into three sections: 'Table and Cell Properties', 'Row Properties', and 'Column Properties'. Red callouts are used to highlight specific elements: '1' points to the toolbar icon, '2' points to the 'Table' tab, '3' points to the 'Table and Cell Properties' section, '4' points to the 'Display Repeating Text' checkbox, '5' points to the 'Apply' button, and '6' points to a row in the table below. The table below the pane shows columns for 'Fund', 'Funds Center', 'Commitment Item', 'Fiscal Period', and 'Item Category'. The 'Display Repeating Text' checkbox is checked, and the 'Apply' button is highlighted.

Documentation

The Documentation button  can be used to access report documentation and/or tab-specific notes.



- A. **Report Documents:** Pertain to the entire report as a whole. Once attached in this section, the document will be available on every tab of the report.

In this example, 65 Budget Report Jump-Goto Map.pdf is attached. To access the document, click directly on the link itself or select the Display option from the menu item.

- B. **Tab/Query-Specific Documents:** Function in the same fashion as Report Documents, but pertain to the specific tab. Documents attached in this section will only be available when the user is utilizing the tab.

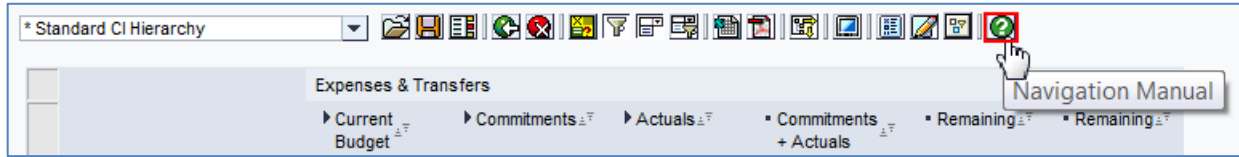
- C. **Data Table Documents:** Used to attach document icons for metadata, master data, and/or data. For instance, you could utilize this option to define a formula that drives a calculated key figure.

To attach a New document:

- Click on the New menu item
- Select Upload from the options
- Give the document a name and description if desired
- Browse to locate the document to be attached
- Click Upload
- Followed by OK to attach the document to either the Report Documents or Tab/Query-Specific Documents (depending on your tab selection).

The General Navigation Manual is available in BI at all times by accessing the last button on the toolbar. While learning the application, it is sometimes helpful to have the application open on one screen while comparing it to the manual on the other.

1. When you click on the button, the link is activated immediately.



2. The manual then opens in PDF format in a new window. You will not lose any changes you've done in the data table as the new window is in addition to the BI application.




Data Table Navigation – Remove Characteristic From Drilldown

Click and Drag

Left-click and hold a Characteristic or Key Figures **column heading/description**, then drag the characteristic description off the data table.

Click and Drag

<<<After

When you see the  symbol, release the mouse button and the characteristic will be removed from the drilldown. **NO FILTERING WAS DONE.**

After: The characteristic, Fund in this example, was removed from the drilldown on the data table but no filtering was done.


Data Table Navigation – Filter Out a Characteristic Value

Click and Drag

Left-click and hold a Characteristic or Key Figures **value**, then drag the characteristic value off the data table.

Click and Drag

<<<<After

When you see the  symbol, release the mouse button and the characteristic value will be restricted out of the data. **FILTERING ON THE DATA WAS DONE.**

After: The characteristic value, Not assigned in this example, was set as a filter exclude on Vendor. The characteristic still displays in rows.



A “!” before the dynamic filter value indicates the value is **excluded**.

Data Table Navigation – Move Columns

The top screenshot shows a data table with columns: Current Budget, Commitments & Actuals, and Actuals. A red arrow points from 'Current Budget' to 'Commitments & Actuals' with the label 'Click and Drag'. The bottom screenshot shows the columns swapped: Commitments & Actuals, Current Budget, and Actuals. Below the bottom screenshot is the text '<<After'.

To move Key Figures columns, simply left-click and hold on the heading/description on the column you want to move and drag it onto the heading/description you want it to appear BEFORE.

After: When you drop a key figure heading/description onto another one it will appear before the one it was dropped onto (when moving from right to left).

Data Table Navigation – Sort Columns

The screenshot shows a data table with various columns. A blue box highlights a sort icon labeled 'Sorted Descending'. Another blue box highlights a sort icon labeled 'Not Sorted'.

Icon	Status	Action on Click
	Not Sorted	Sort Ascending
	Sorted Ascending	Sort Descending
	Sorted Descending	Sort Ascending

Key Figures and Characteristics can be sorted directly on the data table by simply clicking on the sort icon next to the description. One click will sort ascending, click on the icon again and it will sort descending.



Characteristics can also be sorted by key or text. Right-click on the characteristic to access Properties → Characteristics → Sorting to specify a key or text sort if needed.

Data Table Navigation – Call Context Menu

The screenshot shows a data table with a context menu open over a cell. A red box highlights the 'Right Click' label and the context menu options, which include: Back, Goto, Filter, Change Drilldown, Hierarchy, Properties, Sort Fund, Keep Filter Value, Keep Filter Value on Axis, Filter and Drill Down By, Select Filter Value, Remove Filter Value, Budgeting Value Type, Budget Type, Created By, Doc # (Former), Doc Date (Former), Document type, FC User ID, FC User Name, Fiscal Period, Functional Area, Fund Type, Line Item, Ref Doc #, Text (Former), Transaction Type (Former).

The BI Context menu can be opened from the data table. Right-click on any BI object on the data table to call the context menu.



You must see the HAND to call the BI context menu. If you don't see the hand, a right-click may call your browser's context menu. Do not use the browser context menu.

Filter

Keep Filter Value

To display the data for one characteristic value only, choose Filter → Keep Filter Value. The characteristic value itself is removed from the drilldown.

Keep Filter Value on Axis

Choose Keep Filter Value on Axis if you want to display the data for one characteristic value only but still want to display the characteristic value itself in the drilldown.

Filter and Drill Down By > Characteristic

Choose Filter and Drilldown By to fix a characteristic to a value in one step (meaning to filter it) and to drilldown according to another characteristic on the same axis (row axis or column axis).

Select Filter Value

Choose Select Filter Value if you want to filter the data table according to values.

Remove Filter Value

Choose Remove Filter Value to remove a selected filter value from the selected characteristic and display the table unfiltered.

Change Drilldown

Drill Down By > Characteristic 1

In the context menu for a characteristic value or characteristic description, choose Drill Down By → Functional Area if you want to add a characteristic (such as Functional Area) to a particular position in the drilldown.

Swap characteristic 1 / structure 1 with > characteristic 2 / structure 2

You can use this function to swap a characteristic or structure with another characteristic or structure.

Remove Drilldown

Choose Remove Drilldown if you want to remove a characteristic from the drilldown.

Swap Axes

You use this function to swap the axes of the query. For example, if you have characteristics in the rows and key figures in the columns and you choose Swap Axes, the key figures are displayed in the rows and the characteristics are displayed in the columns.



Depending on what characteristic you click on, different options will appear in your context menu. For example, you won't see the Calculations and Translations option unless you're accessing the menu by right-clicking on the Key Figure column headers.

Commitment Item	General Travel	Training/Develop Travl	Admin Travel	Hum Res Recruit Trv	Confer/Seminar Reg	Result	Commitments & Actuals	Commitments & Actuals	Remaining	Remaining
615100					455.00					
615110		1,88								
615120	30,364.83	21,92								
615140										
616000										
Result	30,819.83	23,81								
615100	General Travel						1,594.89	1,5		
615120	Admin Travel	6,500.00					3,470.88	3,4		

Hierarchy

Hierarchy Active

You use this function to switch display hierarchies on and off.

Hierarchy Node Expanded

Select Hierarchy Node Expanded if you want to expand a hierarchy node. If you want to collapse the hierarchy node, deselect the indicator. You can also expand or collapse the hierarchy node by choosing the hierarchy icon.

Expand Hierarchy > Level 1/2/3...

Choose Expand Hierarchy > Level 1 if you want to display more levels of the hierarchy. You can also expand the hierarchy by choosing the hierarchy icon.

Properties

Characteristic

You can make various settings for the characteristic here.

Data Cell

You can make various settings for the structure element or data cell (intersection of two structure elements) here.

All Data Cells

You can make various settings for all structure elements in the drilldown for the Web application.

Data Providers

You can make various settings for the data provider at runtime.

Axis

You can make various settings for the axis here.

Web Item

You can make various settings for the Web item here.

Calculations and Translations

Calculate Single Values As

You use this function to recalculate single values that are displayed in the query according to various criteria (such as minimum, sum, rank number, and so on):

Calculate Results As

You use this function to recalculate results rows that are displayed in the query according to various criteria (such as first value, last value, average, average, median, and so on):

Cumulate After Applying Details and Result Calculations

You use this function to cumulate the individual cells of an area. This means the first value is added to the second value, the result is added to the third value, and so on. In the columns, the cells are cumulated from top to bottom, and in the rows, the cells are cumulated from left to right. With blocks of single values, that is, a drilldown in both the rows and the columns, the values are cumulated from top to bottom and from left to right.

Formulas

You can recalculate the key figures in a structure using a formula. You can also edit or remove existing user-defined formulas. **If you want to keep a formula for future reference you must save a view.**

Goto

Choose Goto → **Actual Detail Lines** (for example), if you want to navigate to jump targets using the report-report interface.

Sorting

Depending on the cell for which you call the context menu. For characteristics, you can sort the characteristic values or attributes according to various criteria, in ascending or descending order. You can sort according to key or name.

Report to Report Interface – Jump/Goto Functionality

User can jump from summary level to detail reports or even SAP transactions.

Commitment Item		Current Budget	Commitments	Actuals
		\$	\$	\$
605100	Postage/Freight/Ship	150.00		
605110	Postage	630.96	16,257.93	134,500.41
605130	Freight/Shipping			26,395.96
606100	Telephone & Telecomm			
606110	Local Telephone Svc			101,689.18
606115	Long Distance Svc	883.76	13,991.85	8,416.19
606120	Telecomm Leases	913.81	37,491.18	82,508.82
606125	Telephone Line Rent	840.00	3,660.00	12,736.00
606130	Tele Equip Install	12,419.33		4,633.81

1. Right-click on a line in the data table. Data on that line (sender) will be transferred to the new window (receiver). If you want to jump to Actual Detail Lines to view postage information, the commitment item must be in the rows.
2. Select the receiver or Goto report. In this example, the employee is being sent to a report of the Actual Details Lines.
3. A new window will open with the sender data inserted in the receiver report or transaction.

Commitment Item		Current Budget	Commitments	Actuals	Commitments & Actuals	Remaining	Remaining
		\$	\$	\$	\$	\$	%
605100	Postage/Freight/Ship	150.00				150.00	100.0
605110	Postage						
605130	Freight/Shipping						
606100	Telephone & Telecomm						
606110	Local Telephone Svc						
606115	Long Dist Tele Svc						
606120	Telecomm Leases						
606125	Telephone Line Rent						
606130	Tele Equip Install						
606135	Panel Charges						
606140	SSHENet Charges						
606155	Cellular Phones						
607100	Advertising						
607120	Adv-Persnl Nonfaculty						
607130	Advert Persnl Faculty						
607200	Public Relatns/Promos						
607210	Advert-Stdnt Recruit						
608100	Subscriptions/Books						
608110	Subscriptions						
609100	Memberships/Dues						
609110	Memberships						
610100	Printing/Duplicating						
610110	Binding And Preserv						
610130	Prntng Svcs Contract						

BEx Web - Bloomsburg Actuals Detail Lines - Windows Internet Explorer

https://ppw.passhe.edu/irj

File Edit View Favorites Tools Help

Convert Select

Favorites BI Web Reports - Shortcut

BEx Web - Bloomsburg Actuals ...

Bloomsburg Actuals Detail Lines

Dynamic Filters

Commitment Item 605110 Postage

Fiscal Year 2012

FM area State System

Fund	Funds Center	Commitment Item	Posting Date	FI Doc #	PO #
Overall Result					
1011000000	1011020101	Provost Discret. Fun	605110 Postage	01/26/2012	1900805613 200123423
	1011020123	Continuing Education	605110 Postage	03/08/2012	5100802092 4500345659
				01/20/2012	1900804329 200123232



In order to successfully complete a jump to a new report or an SAP transaction, the user must have the proper authorizations to the receiving report or transaction. Jumps will not complete if the user is not authorized for the receiving transaction or report.