WaTech
Washington Technology Solutions
"the consolidated technology services agency" -RCW 43.105.006

SAP Business Warehouse / Business Intelligence Reporting

FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

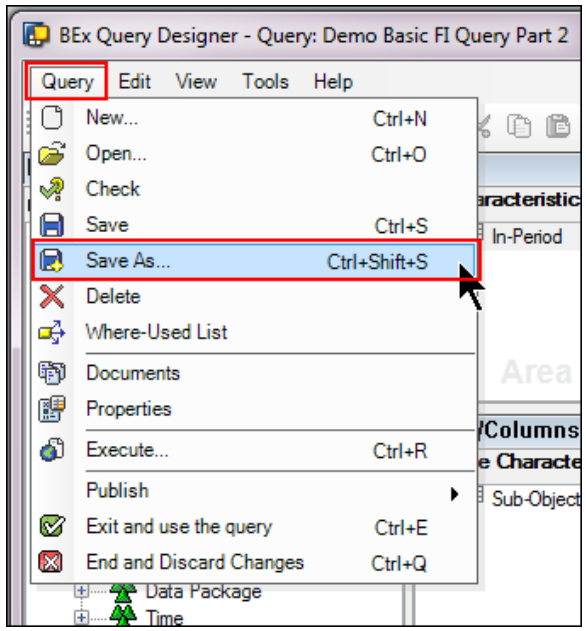
Washington State HRMS Business Warehouse/Business Intelligence (BW/BI)
BW/BI Power User Workshop Materials

General Topics – BW/BI Power Users

FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

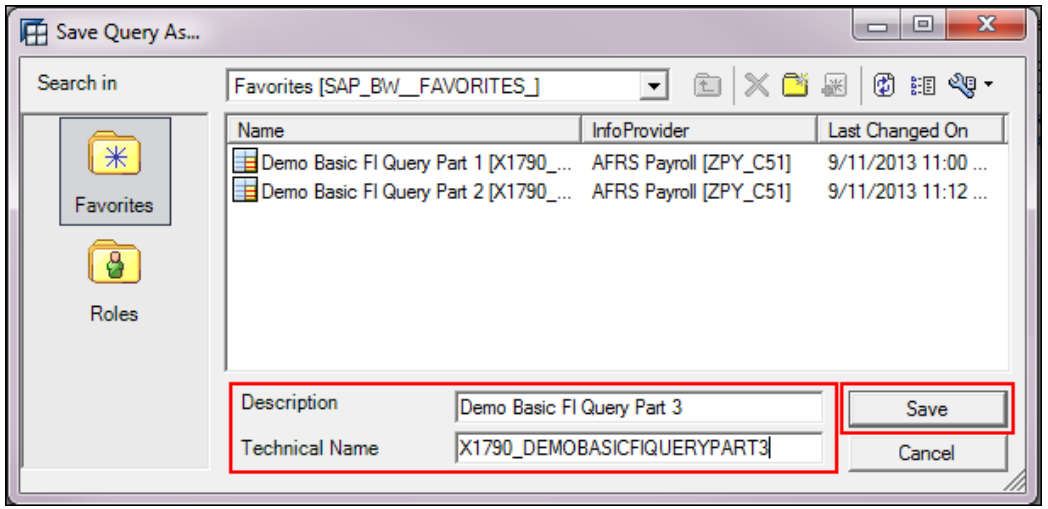
Saving a Query as a New Query

1. Open the Demo Basic FI Query Part 2 in BEx Query Designer.
2. Click the Query tab and select “Save As…”



Result: The “Save Query As…” screen will be displayed.

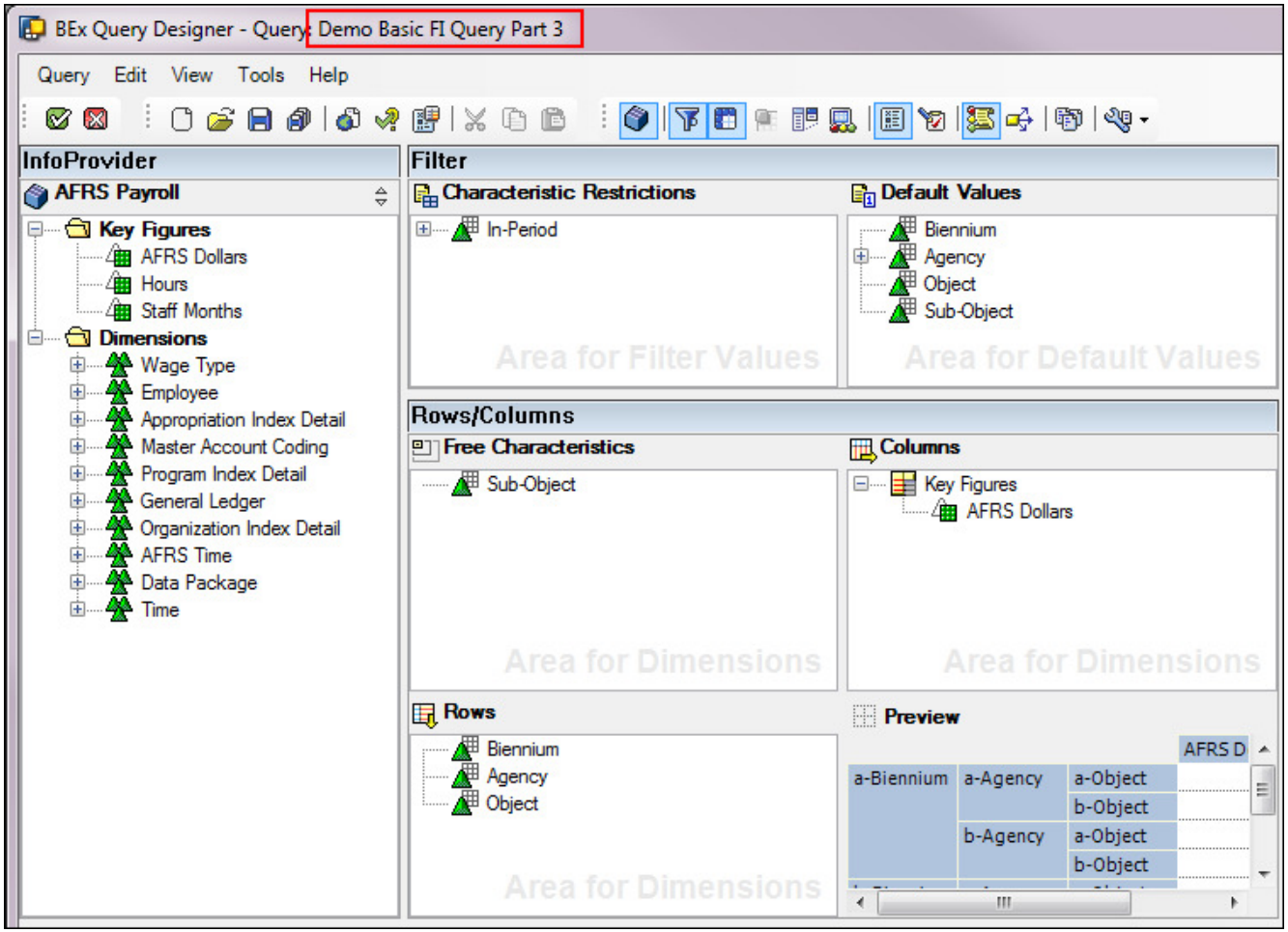
3. Enter “Demo Basic FI Query Part 3” in the Description text box of the “Save Query As…” screen.
4. Enter “X1790_DEMOBASICFIQUERY3” in the Technical Name.
5. Click Save.



FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Saving a Query as a New Query

Result: A new Ad hoc query will be saved as “Demo Basic FI Query Part 3” and return the user to BEx Query Designer with the new ad hoc query displayed for modifications.

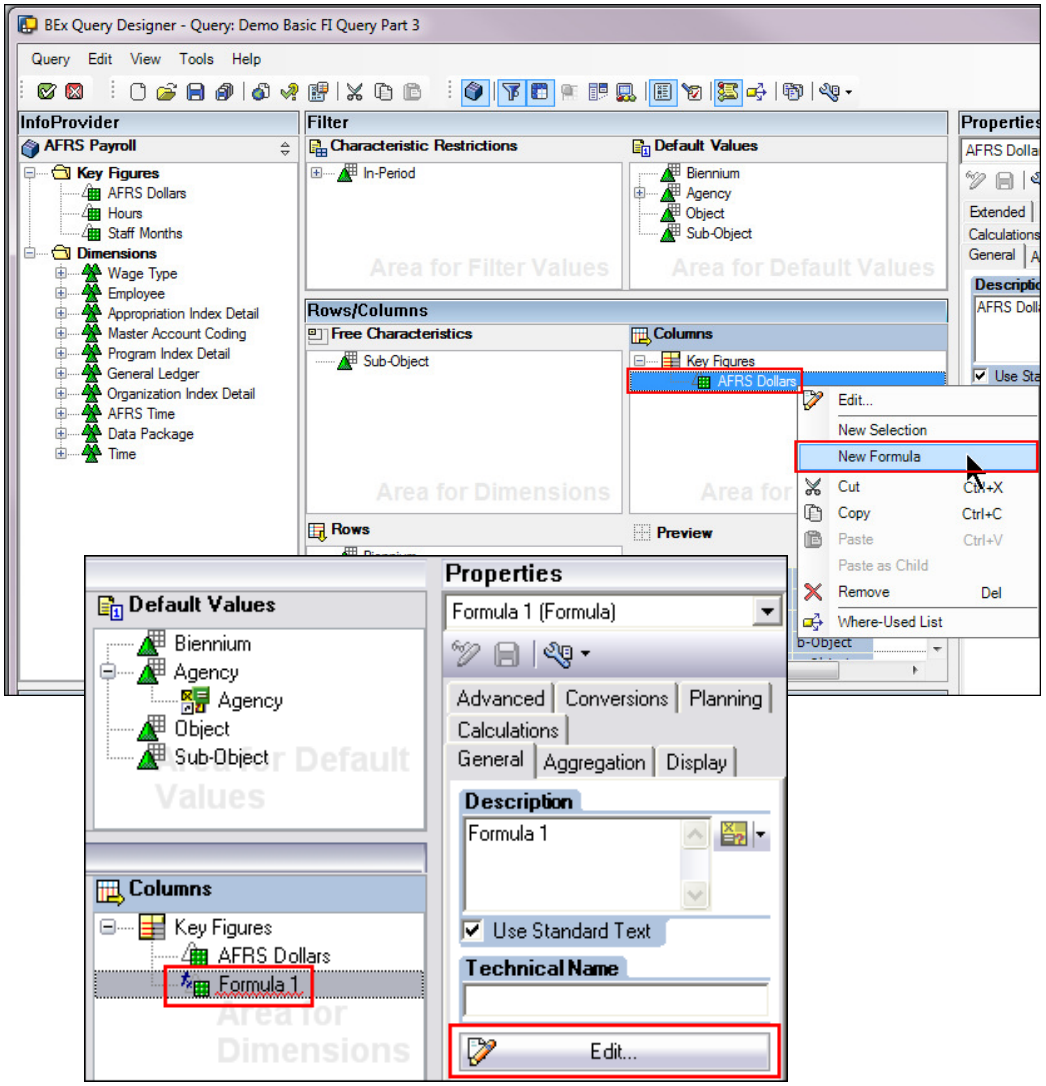


FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Formula

The demonstration below shows how to create a formula that will calculate the Percentage of the overall costs.

1. Right mouse-click the Key Figure “AFRS Dollars”.
2. Select New Formula.
3. A “Formula” option will be added to the query.
4. To access the “Change Formula” screen, either double click on “Formula” or select “Formula” and click the “Edit” button in the Properties section.



FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Formula

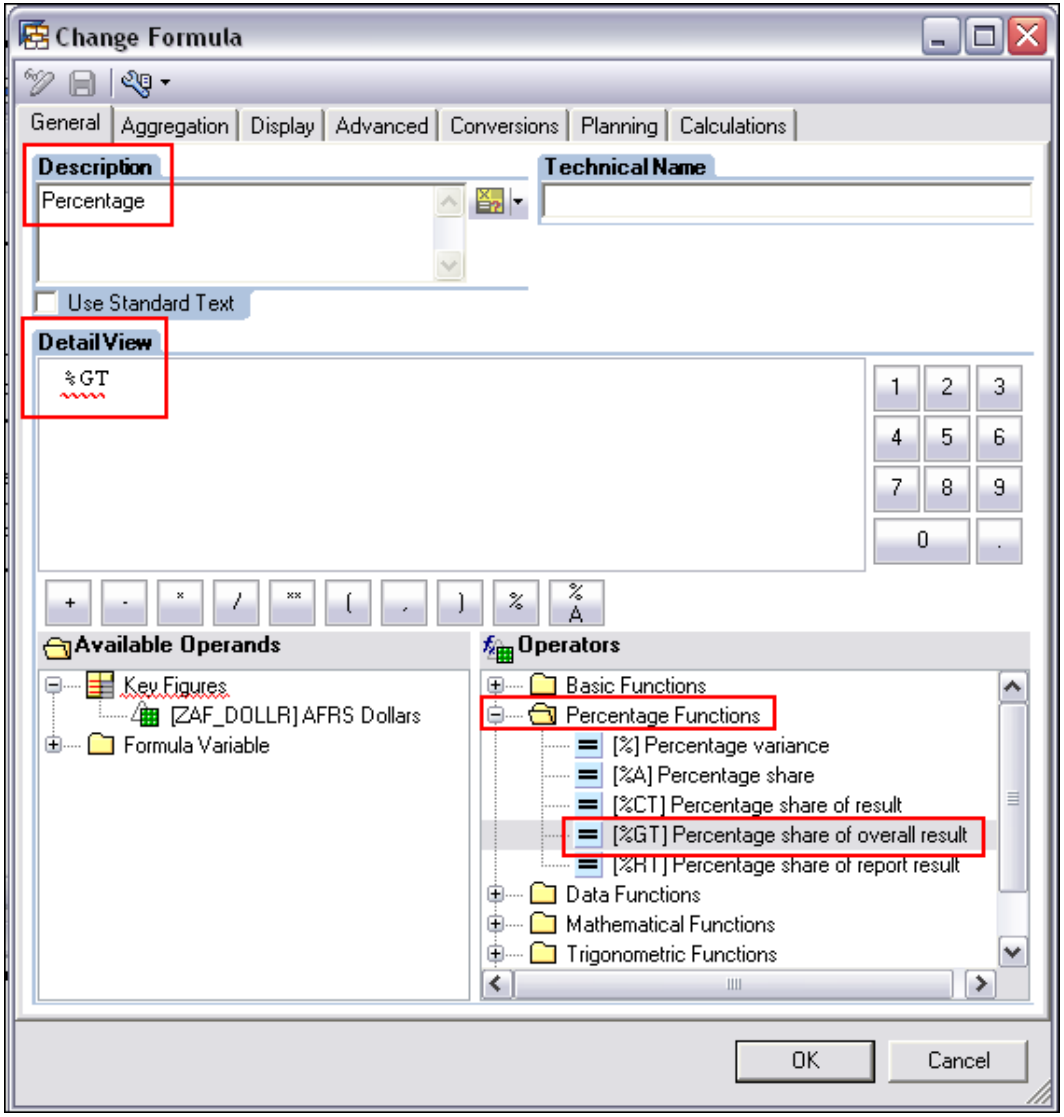
Result: The New Formula screen will be displayed.

3. Name the Formula Description "Percentage".

4. Expand the Percentage Functions folder in the Functions column.

5. Double-click the "Percentage Share of Overall Result" function to add it to the Formula field.

Result: The Percentage Function will be added to the Formula field.



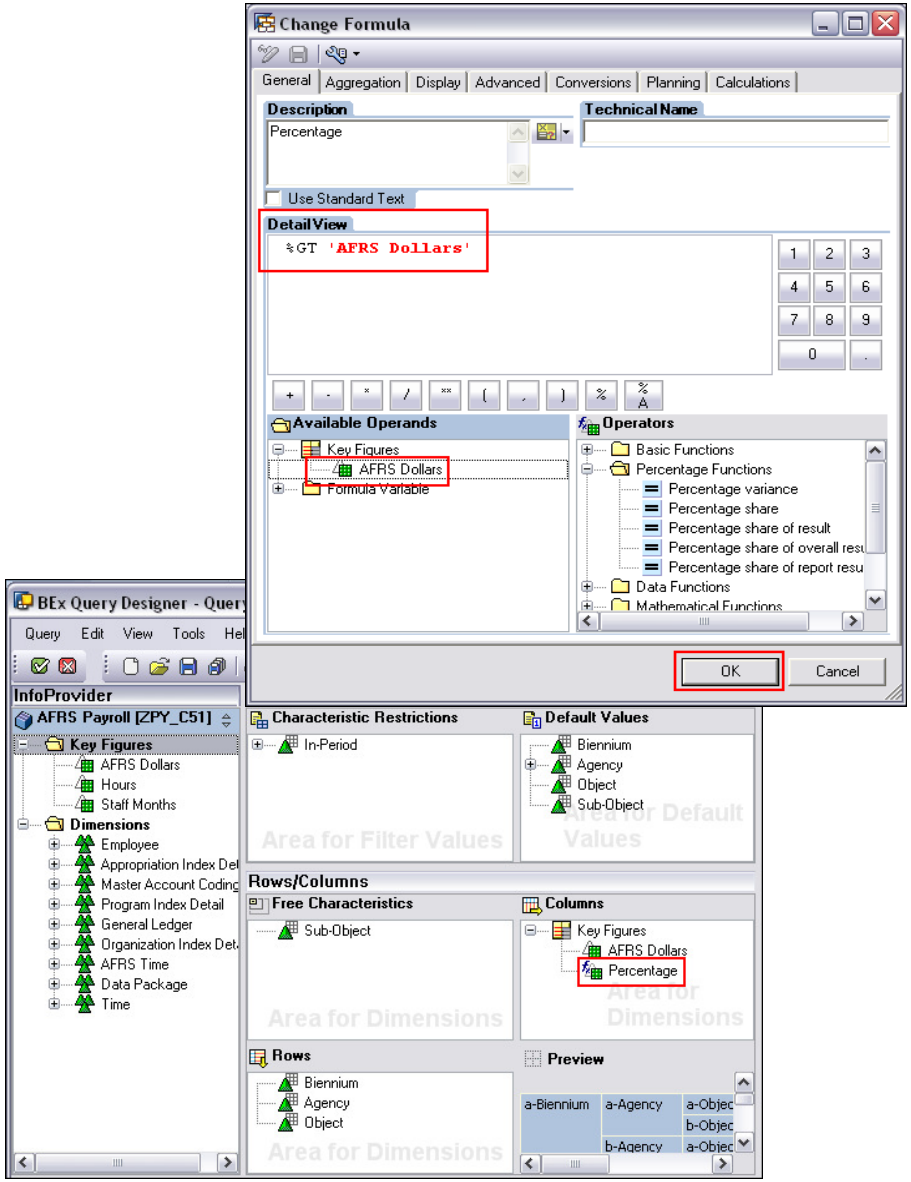
FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Formula

6. Position the cursor at the end of the Formula function in the Formula field.

7. Double-click the Dollar Key Figure in the Structure Elements of the Operands list.
   The Key Figure will be added to the Formula field.

8. Click OK.



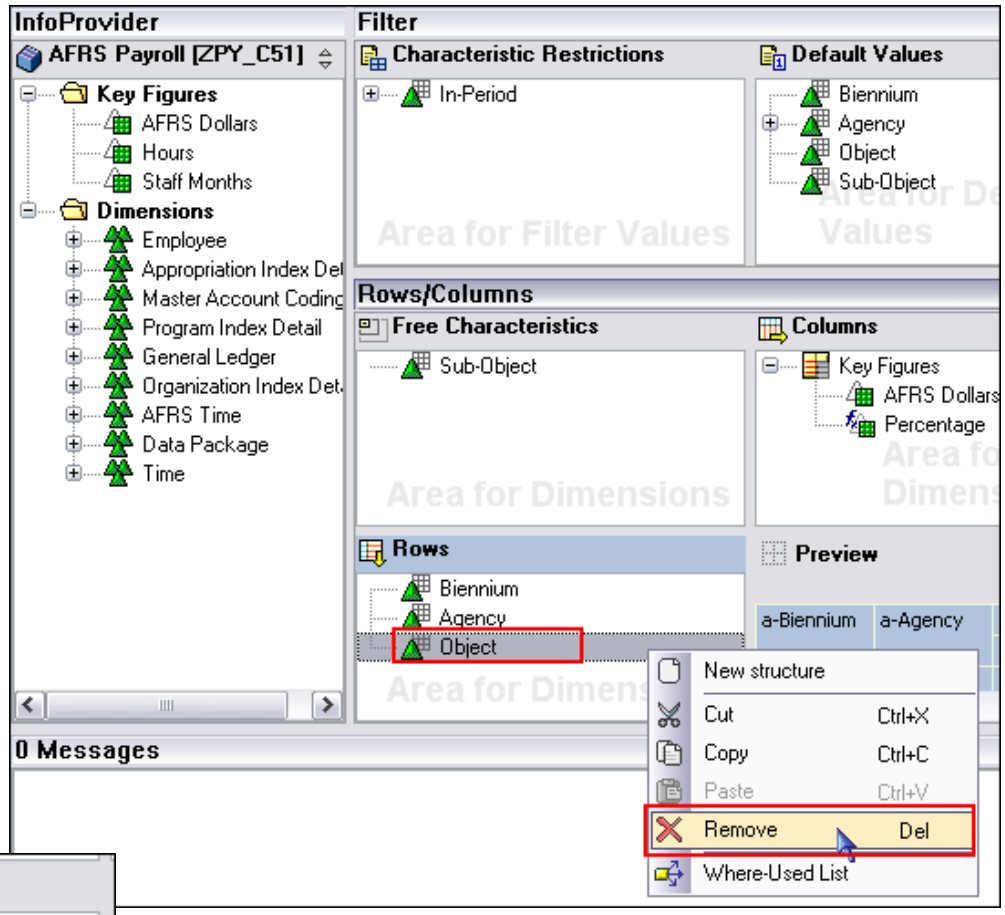
Result: The New Formula has been added to the Key Figures section of the query.

FI Exercise 3: Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

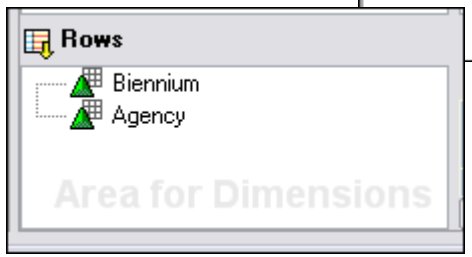
Adding a Restricted Key Figure

To add a Restricted Key Figure that shows the Benefit Costs only, first delete the Object Characteristic from the Rows section:

1. Right mouse-click the Object Characteristic in the Rows section of the query to open the Context Menu.
2. Select Remove



Result: The Object Characteristic will be deleted from the query.

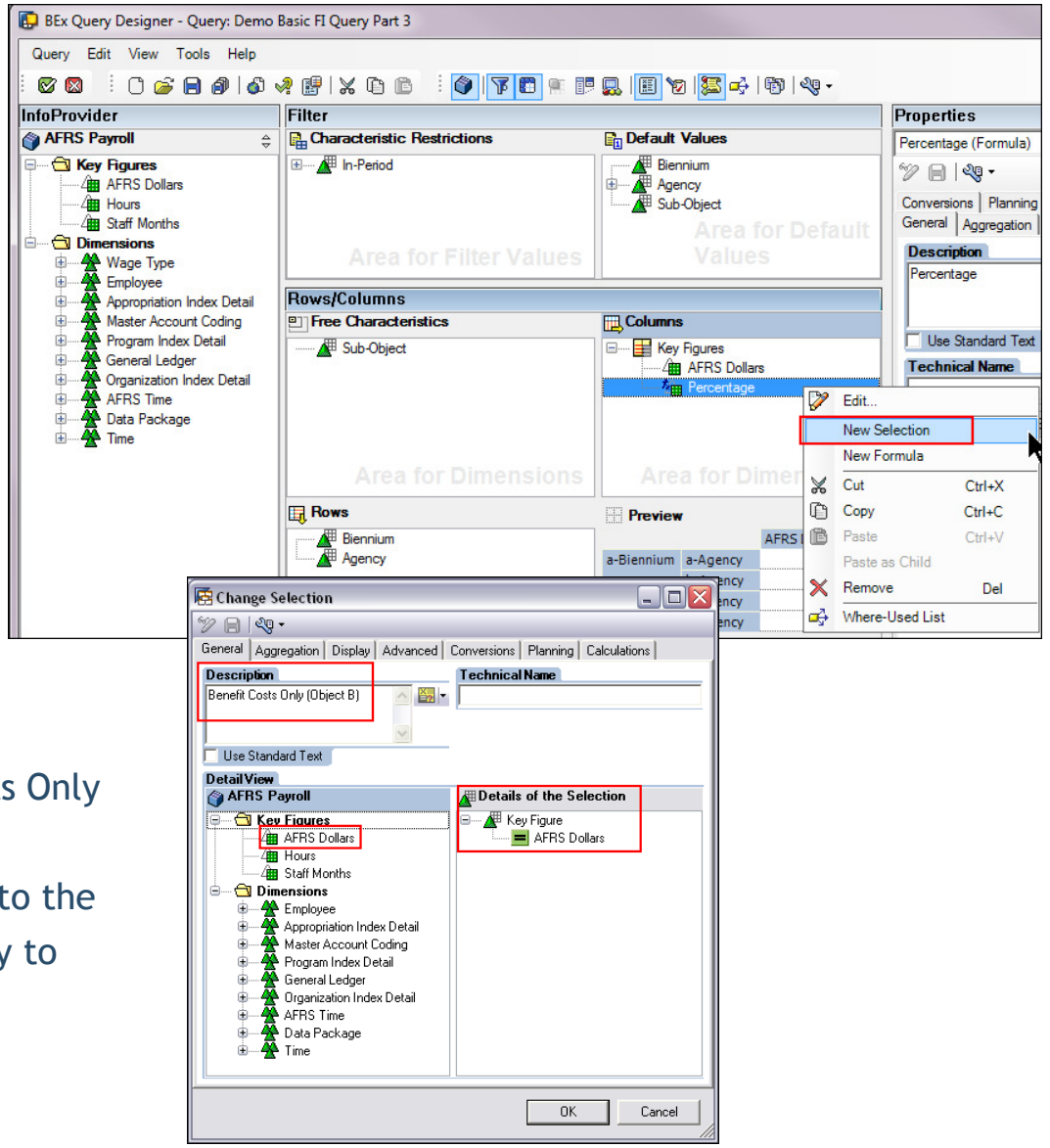


FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Restricted Key Figure

1. Right mouse-click the Percentage formula.
2. Select New Selection.
3. A “Selection” option will be added to the query.
4. To access the “Change Selection” screen, either double click on “Selection” or select “Selection” and click the “Edit” button in the Properties section.

Result: The “Change Selection” screen will be displayed.

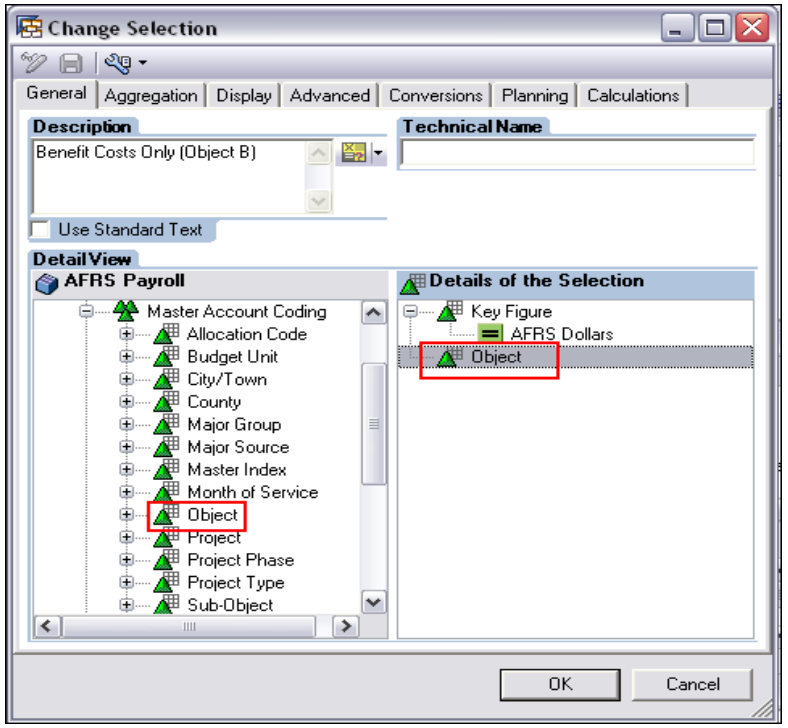


5. Rename the Key Figure to “Benefit Costs Only (Object B)” in the Description text box.
6. Drag&Drop the AFRS Dollars Key Figure to the Description column (it may be necessary to expand the Key Figures column).

FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

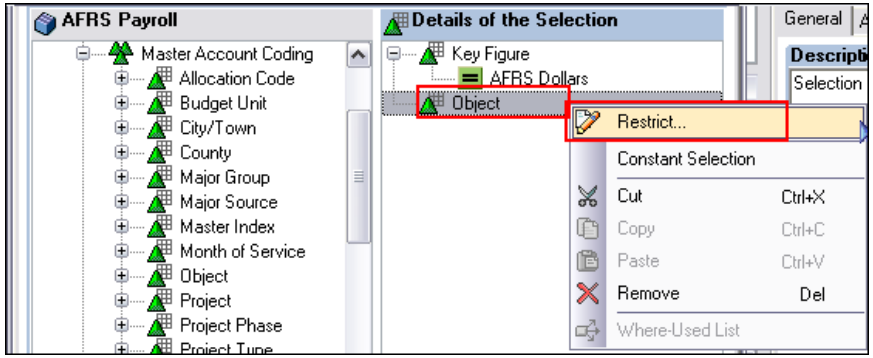
Adding a Restricted Key Figure

7. Drag&Drop the Object Characteristic from the Master Account Coding Dimension to the Description column.



8. Right mouse-click the Object Characteristic in the Details of the Selection column to open the Context Menu.

9. Select Restrict.

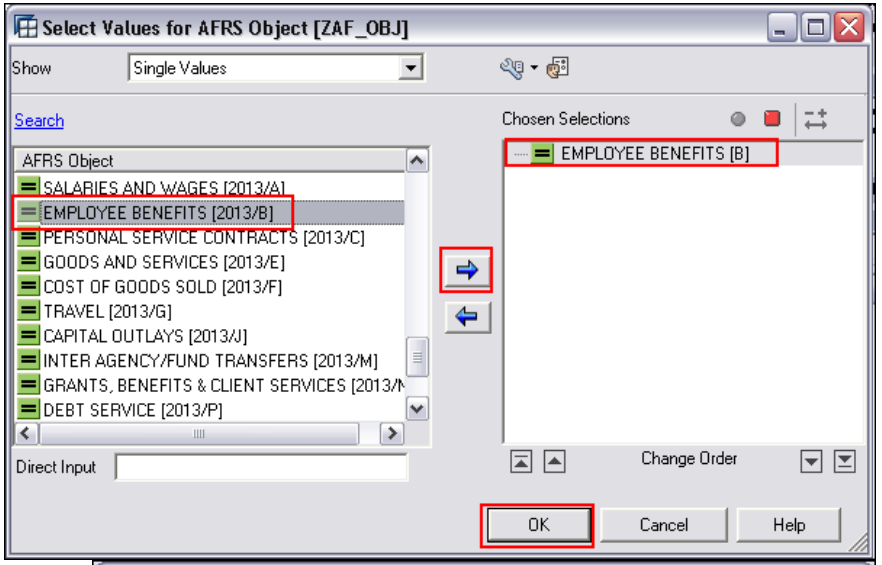


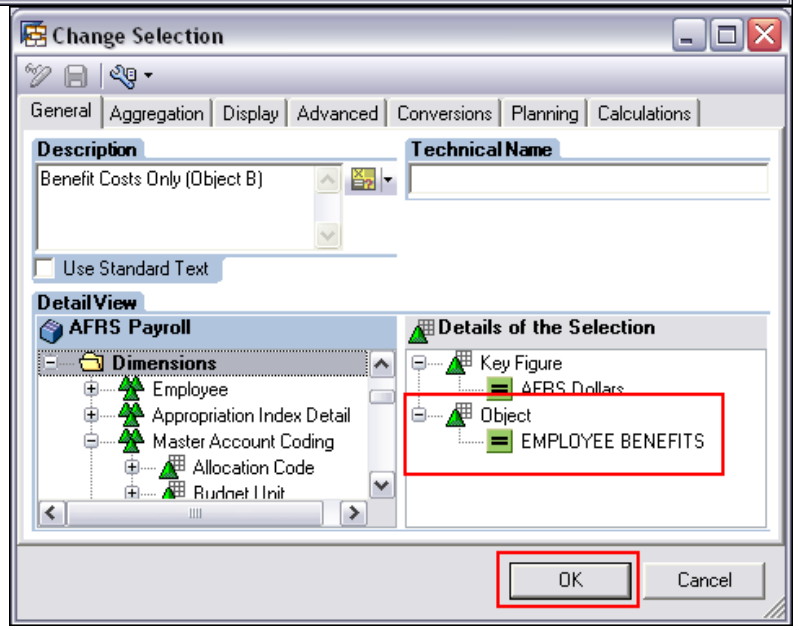
FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Restricted Key Figure

10. Add Employee Benefits to the Chosen Selection column.

11. Click OK.





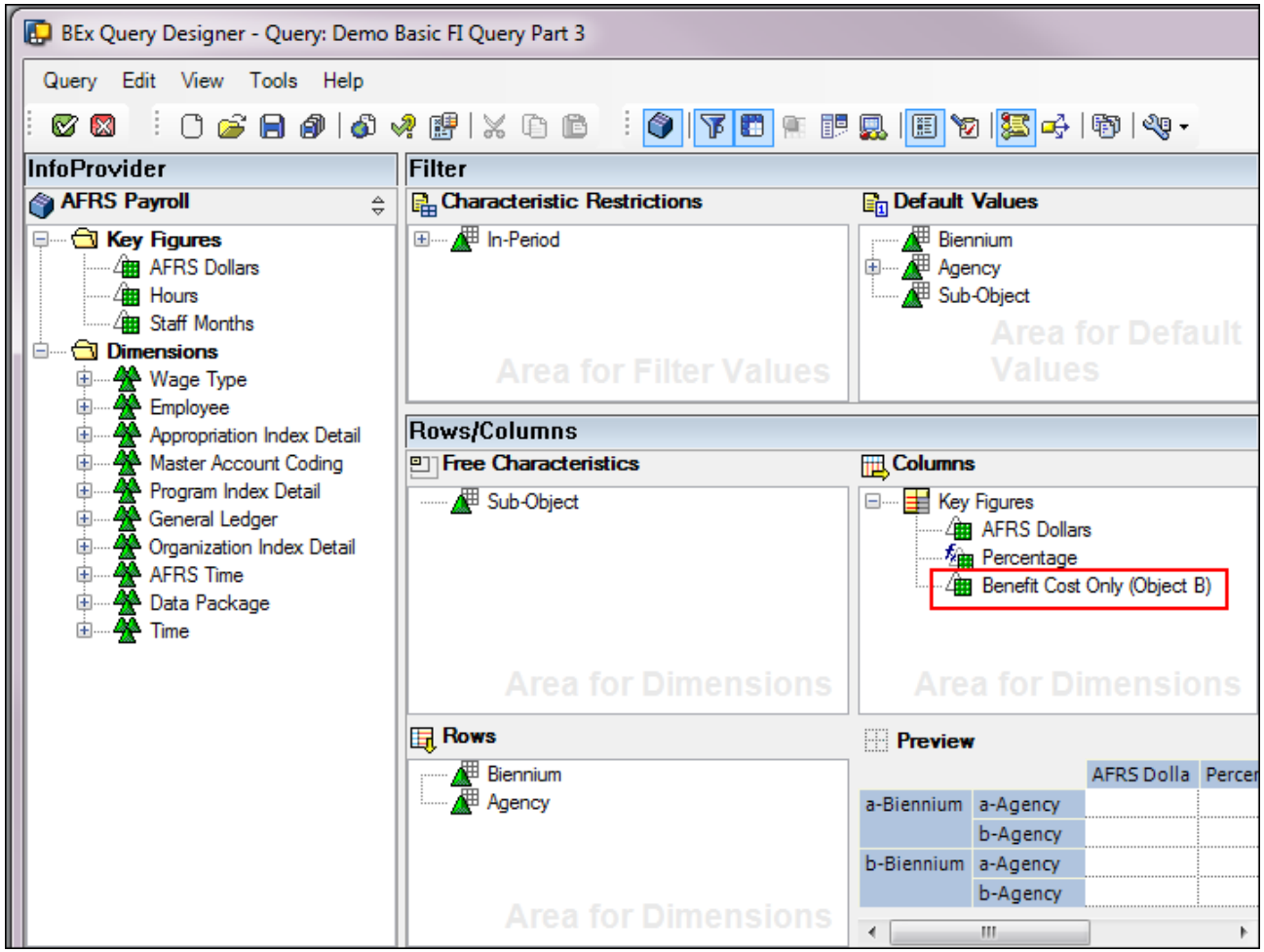
Result: The Employee Benefits Characteristic restriction has been added to the AFRS Dollars Restricted Key Figure.

12. Click OK to close Change Selection screen.

FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Adding a Restricted Key Figure

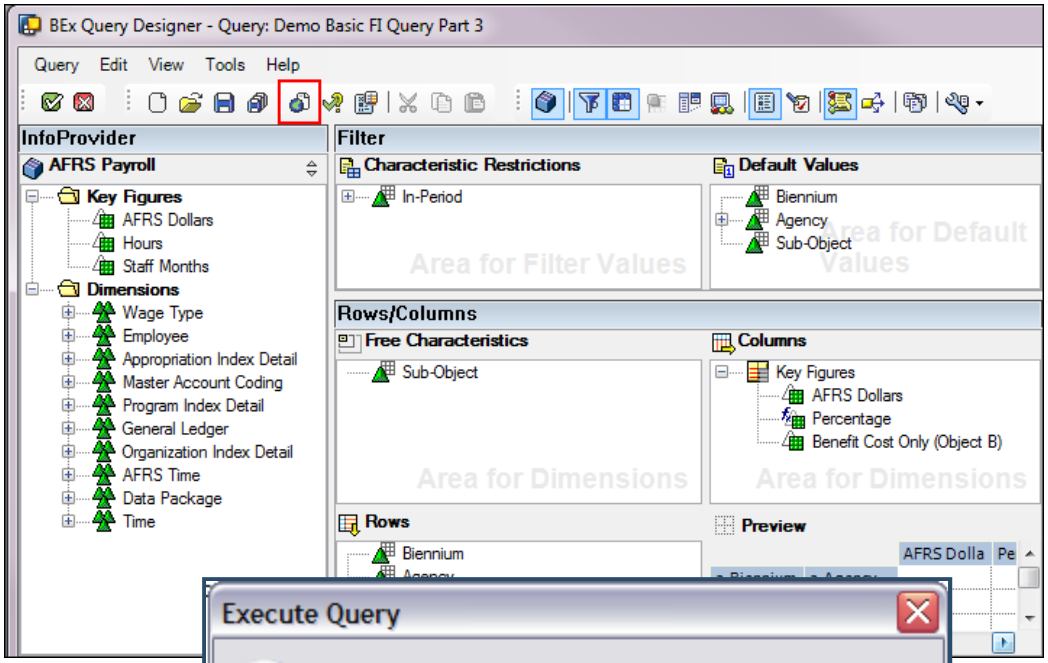
Result: The Benefit Costs Only (Object B) Key Figure has been added to the Columns section of the query. This Restricted Key Figure will display the Benefit Costs in the query results.

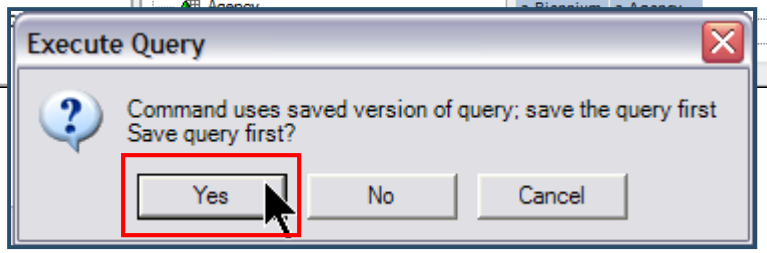


FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Running the Ad Hoc Query

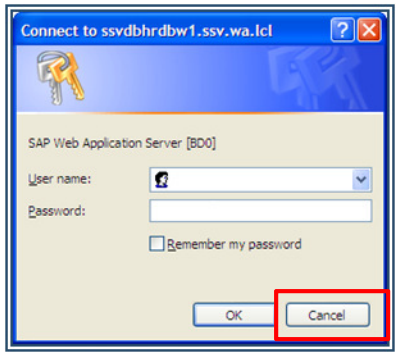
1. Click the Execute Query on the Web icon from the BEx Query Designer toolbar.





If prompted to Save the query, click Yes.

You may be prompted for a userid and password, click **cancel** ~ the Portal log on screen will be displayed and this is where you will enter your userid and password.

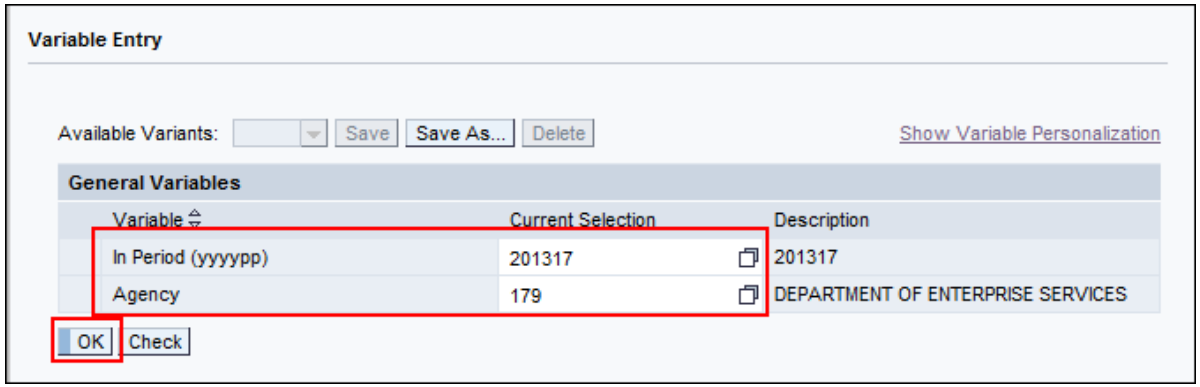


FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Running the Ad Hoc Query

Results: The Variables Entry screen will be displayed (if the user is running an ad hoc query without variables, this screen will not be displayed)

2. Enter report Variables.
3. Click OK.



FI Exercise 3 – Modifying a Basic Ad Hoc Query (Restricted Key Figures and Formulas)

Ad Hoc Query Results

Demo Basic FI Query Part 3

Display As: Table | Information | Send | Print Version | Export to Excel | Comments

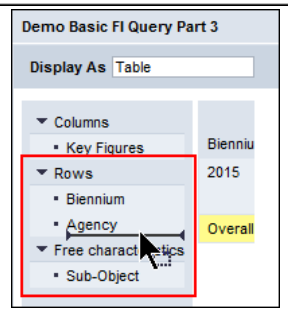
- Columns
  - Key Figures
- Rows
  - Biennium
  - Agency
- Free characteristics
  - Sub-Object

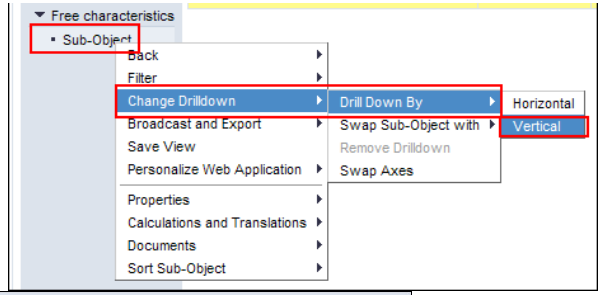
Biennium	Agency	AFRS Dollars	Percentage	Benefit Cost Only (Object B)
		$	%	$
2015	DEPARTMENT OF ENTERPRISE SERVICES	3,451,628.87	100.00000	863,902.53
	Result	3,451,628.87	100.00000	863,902.53
Overall Result		3,451,628.87	100.00000	863,902.53

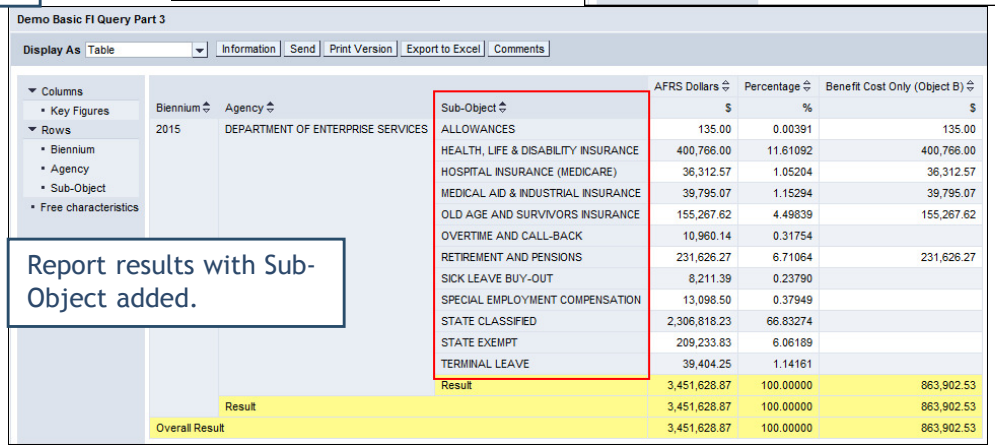
Either Drag&Drop Sub-Object to the Rows section to add it to the query results.

OR

Right click Sub-Object and select "Change Drilldown → Drilldown by → Vertical or Horizontal







Report results with Sub-Object added.