SAP Business Warehouse/Business Intelligence Reporting

BW/BI Report Context Menu

Washington State HRMS Business Warehouse/Business Intelligence (BW/BI) Self-Paced Learning Materials

General Topics - BW/BI End Users/Power Users
The BW/BI Report Context Menu section provides an overview of context menu functions available for BW/BI Custom Reports.

Topics covered in this section include:

- BW/BI Report Context Menu
- Back
- Goto
- Filter
- Settings
- Change Drilldown
- Bookmark
- Properties
- Sort
The BW/BI Report Context Menu provides the user with the ability to perform various analysis such as setting filters, restrictions, exceptions, sorting, etc. The context menu can be accessed by clicking on a report item such as a key figure or characteristic. Context menu options vary depending on the report item selected.

Right click a report result item or column heading to view the context menu for that item. In this example, the column heading “Job” was selected.
The table below describes the Context Menu options in more detail. Context Menu options vary depending on the report item selected (for example, Hierarchies, Characteristics or Key Figures).

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back One Navigation Step</td>
<td>Choose Back to undo a navigational step in a report such as filtering on a specific value.</td>
</tr>
<tr>
<td>Back to Start</td>
<td>Choose Back to Start to undo all navigational steps in a report.</td>
</tr>
<tr>
<td>Keep Filter Value</td>
<td>Choose Keep Filter Value to see only the data for a characteristic value. The characteristic value itself is removed from the drilldown.</td>
</tr>
<tr>
<td>Select Filter Value</td>
<td>Choose Select Filter Value to filter report results according to a value that is selected from a list of values.</td>
</tr>
<tr>
<td>Change Drilldown/Remove Drilldown</td>
<td>Choose Remove Drilldown to remove a characteristic from the drilldown.</td>
</tr>
<tr>
<td>Sort Job</td>
<td>Choose Sort Job to sort structural component values in ascending or descending order.</td>
</tr>
<tr>
<td>Goto</td>
<td>Choose Goto to access sub reports from a main report.</td>
</tr>
<tr>
<td>Broadcast and Export/Bookmark</td>
<td>Choose Bookmark to save report settings once user defined settings have been applied.</td>
</tr>
<tr>
<td>Change Drilldown/Swap</td>
<td>Choose Swap With to swap a characteristic with another characteristic.</td>
</tr>
<tr>
<td>Swap Axes</td>
<td>Choose Swap Axes to swap the axes of the report results. This action will swap the Key Figures to display in rows and the Characteristics to display in columns.</td>
</tr>
<tr>
<td>*Broadcast and Export/CSV</td>
<td>Choose Export to CSV... to export the report to a Comma Separated Values file (.csv)</td>
</tr>
<tr>
<td>Properties</td>
<td>Choose Properties to change settings for a characteristic or key figure.</td>
</tr>
<tr>
<td>Filter/Variable Screen</td>
<td>Choose Variable Screen to display the report variables.</td>
</tr>
</tbody>
</table>

* Exporting topics are covered in a separate section
Back / Back to Start

The Back One Navigation Step / Back to Start context menu items allow the user to undo navigational steps (drilldowns, filters, etc.) that have been applied to report results.

The example below shows the report with the Gender column removed to show how to use the Back context menu item to return Gender to the report results.

To use the Back command and undo a navigational step:

1. From the report results, click any item in the report results to open the context menu.
2. Click Back One Navigation Step.

Result: The Gender column has been added back into the report results.
In this example, the report is displayed with several fields removed from the report results.

To undo several navigational steps and return the report to its original state:

1. From the report results, click any item to open the context menu.

2. Click Back to Start.

Result: All navigational steps have been removed and the report is returned to its original state.
The Keep Filter Value context menu item allows the user to view report results for a specific value in the results.

The example below show how to use the Keep Filter Value option to filter a report to include only those records where Ethnic Origin is “Asian/PI”.

To use Keep Filter Value:

1. From the report results, right click the “Asian or Pacific Islander” value in the Ethnic Origin column to open the context menu.

2. Select Keep Filter Value.
Result: Results will display Asian/PI Ethnic groups only.

The Ethnic Origin column is removed from the report results. The numbers for Ethnic Origin are displayed.
Adding Ethnic Origin back into the report results:

Right click on Ethnic Origin in Free Characteristics, from the Context Menu, select \( \rightarrow \) Filter \( \rightarrow \) Remove Filter Value

Note: This only adds the total numbers back to the report, not the Ethnic Origin heading.

To return the Ethnic Origin column to the report results, select Ethnic Origin from the Free Characteristics and Drag&Drop on to the report.

If necessary, you can click any column header and select Back to Start from the context menu to return the report to its original state.
Select Filter Value

The Select Filter Value context menu item allows the user to select a filter from a list of filter options. The example below shows how to use Select Filter Value to filter for a specific Ethnic Origin.

To use Select Filter Value:

1. From the report results, click the column header to filter by (this example uses Ethnic Origin).
2. Click Select Filter Value from the context menu.
3. From the Select Filter Value screen, select Asian or Pacific Islander.
4. Click Add and OK.

Result: Results will display Ethnic Origins identified as Asian or Pacific Islander only and keep the header in the report results.
The Remove Drilldown context menu item allows the user to remove a characteristic from the report results. The example below shows how to remove the drilldown on Business Area.

To remove the drilldown:

1. From the report results, click the Business Area column to open the context menu.
2. Select Change Drilldown/Remove Drilldown.

To add it back: right click Business Area in the Free Characteristic and select Change Drilldown/Drilldown by: Horizontal (Columns) or Vertical (Rows).

(Note: it will be placed at end of the section and you will need to manually change it if you want it in a different sequence).
The Sort context menu item allows the user to sort report items in ascending or descending order. The example below shows how to sort by Ethnic Origin.

To sort a Characteristic:

1. From the report results, click the Ethnic Origin column to open the context menu.
2. Select Sort Ethnic Origin → Descending by to Text.

Result: The Ethnic Origin will be sorted in Descending Order by Text.
Some BW/BI Custom Reports contain sub reports that are accessible from the main report. The Goto Command allows the user to access sub reports from the context menu.

The example below uses the Position/Personnel Master Listing report to describe how to use the Goto command to run a sub report.

To use the Goto command:

1. From the report results, click an Position to open the context menu.

2. Click Goto → Employees in Position.

Result: Display the employee for the selected position.
The table below contains a list of BW/BI Custom Reports that provide Goto sub reports.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Goto Report</th>
</tr>
</thead>
</table>
| **Employee History** (see example on previous page) ZZPA_M03_Q431 | ➢ Employee Education Record  
➢ Employee History Part 2                                                   |
| **Appointment Status Changes** ZZPA_M03_Q494                  | ➢ Appointment Status Changes - Prior Month Status                            |
| **Position - Personnel Master Listing** ZZPAOS_C01_Q499       | ➢ Employees in Position  
*Note: Employees in Position drills down to Employee Actions (see below)* |
| **Employees In Position Sub-Report** (Sub-Report of Position - Personnel Master Listing) ZZPA_M03_Q499C | ➢ Employee Actions                                                          |
| **Employee Roster** ZZPA_M03_Q231A                            | ➢ Gender/Ethnic_Origin/Disability/Military/Veteran by Employee  
➢ Cost Distribution by Employee                                      |
| **Position Statistics Report** ZZPAOS_M03_Q516                | ➢ Position Statistics - Position Fill Count                                 |
Swap Characteristics

The Swap Characteristics context menu item allows the user to swap the location of one characteristic with another.

The example below report shows how to swap the Gender column with the Ethnic Origin column.

To Swap Characteristics:

1. From the report results, click the column header to be swapped to open the context menu.

2. Click Swap Gender with → Ethnic Origin.

Result: Swap the Gender and Ethnic Origin columns.
Swap Axes

The Swap Axes context menu item allows the user to swap the columns and rows in the report results. For example, the user may want to view report characteristics in columns, rather than rows.

The example below shows how to swap report axes.

To swap report axes:

1. From the report results, right click any item to open the context menu.
2. Click Change Drilldown/Swap Axes.

Result: The rows and columns of the generated report results have been swapped.
The Bookmark context menu item allows the user to save their report modifications once they have applied filters, sorted columns or defined any other report settings. A Bookmarked report will also retain the variable values used to run the report.

In the following example, the Distribution of Payroll and Related Costs report was run with user defined settings.

To create a Bookmark to save report settings for future use:

1. From the report results, click any item in the table to open the context menu.
2. Select Broadcast and Export → Bookmark:
The “Save Bookmark to Browser Favorites” is displayed with a popup asking if you want to allow this webpage to access your Clipboard.

If you select “Don’t allow”, you get the “Save Bookmark to Browser Favorites” with the “Add to Favorites” option, but without the “Copy to Clipboard” option:
If you select “Allow access”, you get the “Save Bookmark to Browser Favorites” with the “Add to Favorites” option and the “Copy to Clipboard” option:
To add the Bookmark to your Browser Favorites:

1. Select “Allow access” or “Don’t allow”:
2. Select “Add to Favorites”:
3. The “Add a Favorite” popup is displayed:
4. Click the “Add” button (you can change the name of the Favorite if needed):
1. The Bookmark personalized report has now been added to your Browser Favorites:

2. To generate your Bookmark report, access your Favorites list → Select the Bookmark:

3. To delete the Bookmark, access your Favorites → Bookmark → Right Click → Delete
This option copy’s a link for the Bookmarked report to your Clipboard.

1. Select “Allow access”:
2. Select “Copy to Clipboard”:

3. “Do you want to allow...popup is displayed again. Select “Allow access”:

4. The Bookmark link is now copied to your Clipboard and ready to paste into a document or email.
Bookmark Link:

Once you have copied your Bookmark link to your Clipboard, select “Close” to exit the “Save Bookmark to Browser Favorites” popup.
Reports run from the HRMS Portal allow the user to set report properties in two ways:

1. **Properties** - Set properties such as Display and Sort for items such as Characteristics and Key Figures in the report results using the Context Menu.

2. **Query Properties** - Set query properties such as location of results rows and how to display zero values in the report results using the “Settings” button on the report results.
The Properties context menu item allows the user to change settings for report items such as Characteristics and Key Figures. For example, the user may want to display a Characteristic as Key and Text or sort a Key Figure value in Descending order. Property options vary depending on the report item selected.

Common Property settings include:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>Layout in which to present the characteristic. For example, display a Characteristic as Key and Text, Text Only or no Display.</td>
</tr>
<tr>
<td>Sort By</td>
<td>Sort Characteristic values. For example, sort by the Characteristic Key value or by the Characteristic Text value.</td>
</tr>
<tr>
<td>Sort Direction</td>
<td>Sort direction of Characteristics. For example, sort Characteristic value in Ascending or Descending order.</td>
</tr>
<tr>
<td>Suppress Results Rows</td>
<td>Determine whether the results rows of the Characteristic are suppressed. For example, always suppress the results rows, never suppress the results rows, or suppress results rows that have only one value.</td>
</tr>
<tr>
<td>Calculate Result as</td>
<td>The Key Figure's calculated result. For example, calculate results as a summation, as the maximum amount, as the minimum amount, as the average of all values or suppress the results altogether.</td>
</tr>
<tr>
<td>Calculate Direction</td>
<td>Format of the calculation. For example, calculate the results along the rows or calculate the results along the columns.</td>
</tr>
<tr>
<td>Calculate Single Value as</td>
<td>Calculation of single values. For example, count all values not equal to zero, average all values, calculate values as a ranked list, calculate the maximum value or calculate the minimum value.</td>
</tr>
</tbody>
</table>

Section 8: General Topics / BW/BI Report Context Menu
Properties

The example below shows how to access the properties of Characteristics or Key Figures from the context menu.

To access Characteristic Properties:

1. From the report results, right click any characteristic to open the context menu.
2. Click Properties → Characteristic.
4. Click OK to assign the new property settings.

Result: Property settings will be applied to the report results.
The Query Settings allows the user to change settings for a query within a report. For example, the user may want to display report results at the top of the report results table, rather than the bottom or display zero values as an empty cell.

Common Query Settings include:

<table>
<thead>
<tr>
<th>Display rows/columns hierarchically</th>
<th>Place characteristics that are split over several rows or columns in one row or column in a hierarchy by selecting “Display the columns [or rows] hierarchically...” and specify the node to expand the hierarchy to.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results Position</td>
<td>Specify the location of the report results. For example, display results at the bottom/right of the report results or display results at the top/right.</td>
</tr>
<tr>
<td>Display of +/- Signs</td>
<td>Specify how negative numbers are displayed. For example, display negative values as:</td>
</tr>
<tr>
<td></td>
<td>-5</td>
</tr>
<tr>
<td></td>
<td>5-</td>
</tr>
<tr>
<td></td>
<td>(5)</td>
</tr>
<tr>
<td>Display of Zeros / Show Zeros as</td>
<td>Specify how zero values are displayed in the report results. For example, display zeros:</td>
</tr>
<tr>
<td></td>
<td>With Currency/Unit: Zeros are displayed with the currency/unit (for example, $0.00). This is the default setting.</td>
</tr>
<tr>
<td></td>
<td>Without Currency/Unit: Zeros are displayed without a currency or unit entry (for example, 0.00).</td>
</tr>
<tr>
<td></td>
<td>As Empty Cells: Cells containing a zero value remain empty.</td>
</tr>
<tr>
<td></td>
<td>Display Zeros As: Use this setting in conjunction with the Show Zeros As field to specify the character to use to display zeros (for example, an asterisk (<em>). All cells containing zeros will be populated with an asterisk (</em>)).</td>
</tr>
<tr>
<td>Suppress / Effect on</td>
<td>“Suppress” specifies whether columns or rows containing zeros are to be displayed. For example, suppress a column that results in zero. The following options are available for Suppress:</td>
</tr>
<tr>
<td></td>
<td>No: All Rows or columns with zeroes are displayed.</td>
</tr>
<tr>
<td></td>
<td>Active: Every row or column that has a result of zero is not displayed. For example, if the row or column contains the values 1, -1, 1, -1, the result is zero. The Active setting will suppress the entire row or column that results in zero.</td>
</tr>
<tr>
<td></td>
<td>Active (all values = 0): Every row or column containing zero values in all cells will not be displayed.</td>
</tr>
<tr>
<td></td>
<td>“Effect on” defines whether suppression of zero values should be applied to rows and columns, only to rows or only to columns.</td>
</tr>
</tbody>
</table>
Query Settings

The example below shows how to access the Query Settings.

1. From the report results, click the Settings button.

2. Query properties is displayed.

3. From the Local Settings of Query window, change the Query settings.

4. Click Apply.

Result: Query Settings will be applied to the report results.
The Variables Entry context menu item allows the user to display the report selection criteria variables screen.

The example below shows how to open the Variables Entry screen.

To view the Variables Entry screen:

1. From the report results, click any item to open the context menu.
2. Click Filter/Variables Screen.

Result: The Variables screen is displayed to allow the user to enter new or modify existing variables for the report.