Introduction

Saved Views based on BW reports will not be automatically converted to Bookmarks, the term used for saved layouts in SAC. It is necessary to manually recreate any View that's important to you in the SAC environment. This Help Guide highlights some of the elements of an existing View that you may want to incorporate in your SAC Bookmark.

Characteristics of a BW View

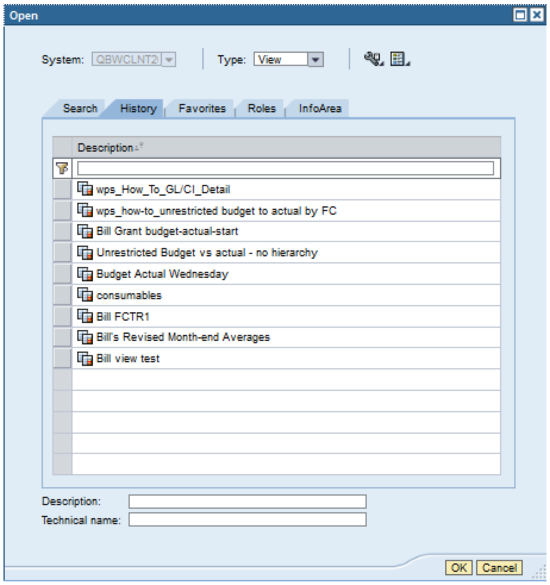
Every Business Warehouse Saved View is tied to a specific report. Reports provided in the initial rollout of SAC are recreations of corresponding reports in BW. While the look and feel are slightly different, the report layouts are the same, the data fields each report contains are the same and the data available in each report is identical to its BW equivalent.

The best way to recreate the elements of a BW View is to first make note of its characteristics, including variables specified, layout, filtering applied, sorting, and subtotaling. Those elements are considered below. Once you understand what the View does and how it does it, you can create an SAC Bookmark that is analogous.

Find and run the View to be replaced

Navigate to the Reporting home page on the BUworks portal.

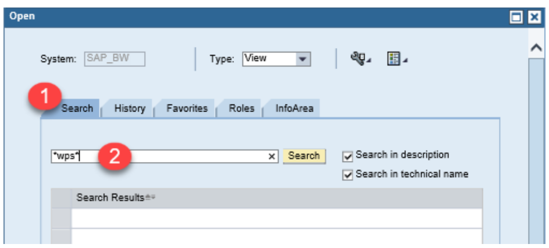
1. Click on the *Reporting* tab to open the Reporting home page.
2. Click on *Saved Views*.



The *Open* window initially displays the *History* tab. This tab lists the views you have recently used.

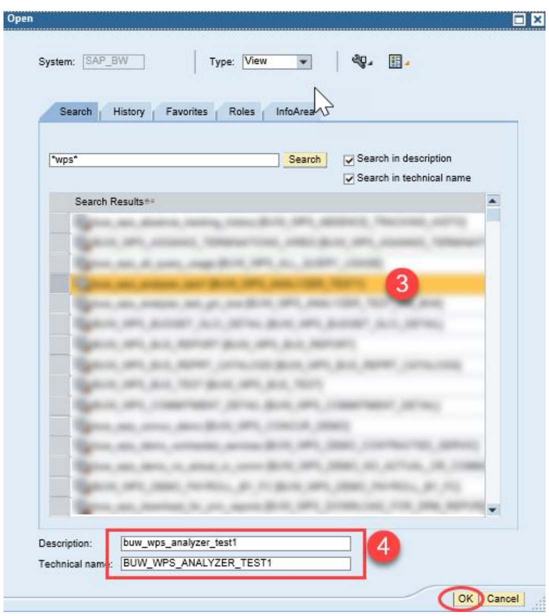
The list may be sufficient to identify any view(s) you want to recreate.

Remember, you need to recreate Bookmarks only for those Views you want to have available in the SAC environment.



If you don't see the View you want to replace, use the *Search* tab (**1**) to find it.

Enter a portion or your View name in the search field (**2**). Use wildcard characters ("*") as necessary. Press the **Search** button to begin your search.



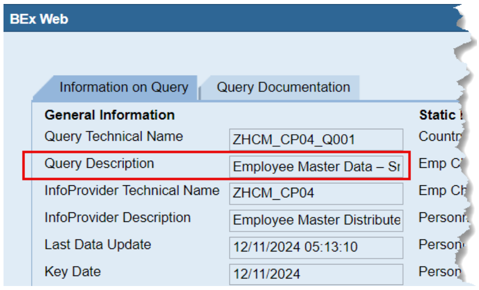
Click to select the View you will recreate from the resulting list (**3**)

Confirm this is the View you seek based on the Description and the Technical Name displayed (**4**)

Click **OK** to run the View

1. **Click OK to run the View**
2. **Determine which report was used as the basis for the View**

   This may sound obvious, but in case you aren't sure, click the **Info** button. Information like this will display:



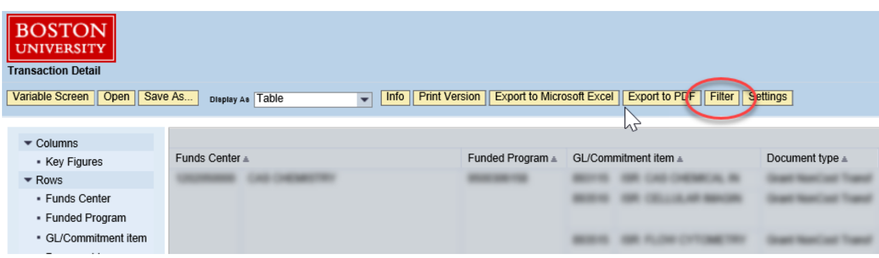
   The *Query Description* field contains the name of the report. There is no information regarding the folder containing the report, so you will need to determine that on your own.

3. **Make note of the View layout**

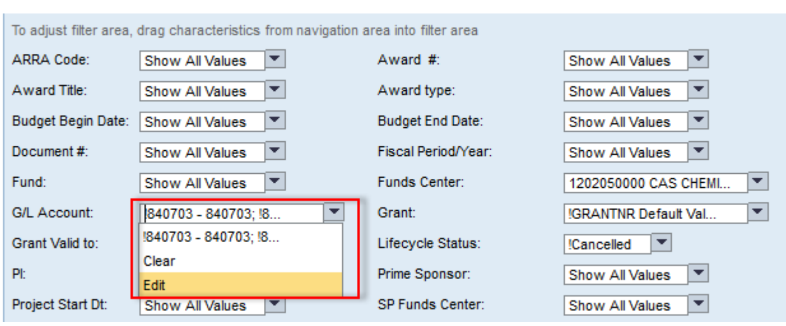
   Record which data fields the View contains, the order in which columns are displayed, whether the report contains subtotals or a grand total, etc.

   Tip: if the report is narrow enough to display in a single computer screen, make a screen print so you can later reproduce the look and feel. If the report is too wide to fit in a single screen shot, export the report output to an Excel file so you can refer to it when recreating your View.

4. **Note Any Applied Filters**



   With the output displayed, click on the **Filter** button



   A display like this will result.

   Note which characteristics have been filtered (any field which displays "Show All Values" is not being filtered).

   In this example, a filter has been applied to **G/L Account**, **Funds Center**[1], and **Grant**. To see the filter values specified, click each field's drop-down arrow and click *Edit*. Make note of the values specified.

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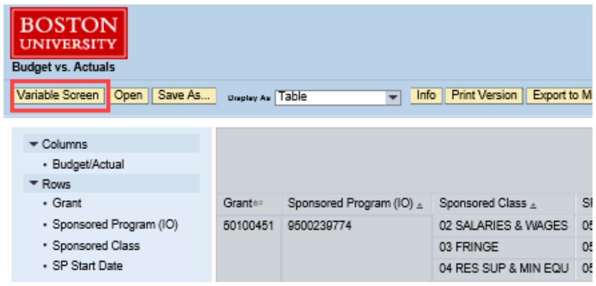
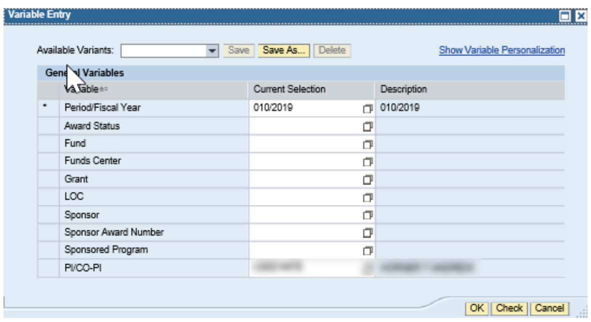
[1] In this case, Funds Center values were specified at run time via the Variable Entry screen.

Some of the filters may have been applied as part of the query underlying the original report. That is, you may not have explicitly filtered some fields. **Grant**, above, is an example of this case. Filters like this will be applied in the new reports, so no action on your part is required. If you are unsure whether a filter is yours or that of the underlying query, make a note of the filter value. When you run the corresponding SAC report and before you apply any filters yourself, check to see which filters are active. These active filters are part of the query and do not have to be manually recreated.

5. Note Variable Values Associated with the View



Click the **Variable Screen** button to display the Variable Entry screen



Make note of all variable values specified. You will use this again in the following step

Recreating the View

When you are ready to recreate an SAC Bookmark to emulate a View, consider these steps:

1. **Run the SAC report to which the previously saved View corresponds.**

   Use the variables you noted in Step 5 above to run the report.

2. **Modify the report per the information you collected when examining the BW View.**

   Once data is displayed, modify the report output based on the layout and filters (steps 3 and 4) originally applied to the View being replaced. Make sure the layout matches, the filters are the same, placement of totals agree, and so forth.

3. **Save the modified report as a new Bookmark.**

   If you need a reminder on how to save a Bookmark, review the steps outlined in the Help Guide [SAC how to - create, use and manage bookmarks](#).

The preceding steps require that you know how to perform actions in SAC corresponding to the actions you used to create the View in BW. Here are Help Guides that provide detail for tasks you might need to complete in SAC:

Task	Help Guide
Create an SAC Bookmark	SAC how to - create, use and manage bookmarks
Specify variables to run a report	SAC Basics –Variable Entry screen details
Modify the report layout	SAC how to - add-move-remove report data
Apply filters	SAC how to - filter report data
Add/remove totals	SAC how to - add a total to a report
Sort data as necessary	SAC how to - sort a Dimension or a Measure