Introduction

Process and Trigger
The ability to add, remove or move data within a report are among the most common ways to customize Business Warehouse (BW) reports to suit your needs. This document describes (1) how to remove a characteristic, (2) how to add a characteristic from the Free Characteristics list, and (3) how to move a column from one position to another within a report.

Prerequisites
- Introduction to BW Reporting at Boston University (video)
- Working with BW Reporting (video)

Menu Path
None

Transaction
None

Tips and Tricks
- While they are not technically identical, this document uses the terms characteristic and column interchangeably.
- Characteristics can be added or removed by operating on a column header within the analysis area of a report or by operating on the characteristic within the Rows list in the blue region to the left of the analysis area. While either technique will work, our experience has shown us that precision movement is easier to control when working with the Rows list.
- When performing an operation on a characteristic, be careful to position the cursor directly on the text of the name. Unexpected results may occur if the characteristic is not precisely selected.
- The top to bottom ordering of characteristics in the Rows list corresponds to the left to right ordering of columns in the report analysis area. For example, the top position in the Rows list corresponds to the left-most column of the analysis area. The second characteristic in the list corresponds to the second column, and so forth. The apparent exception to this correspondence occurs when a characteristic has been hidden (the characteristic’s display attribute has been set to “not displayed.” In that case, the characteristic will be included in the Rows list but will not appear in the analysis area.
- Sorting/grouping within a report is controlled by the left to right order in which columns are displayed. The left-most column has the highest sort precedence, the first column to the right has the second sort precedence, and so forth.

Reports
None
**Procedure**

**Removing a Characteristic from a Report**

In this example, the **Grant Valid From** characteristic will be removed from the report.

1. Click on the column header of the characteristic to be removed. Hold down the left mouse button. The appearance of a small circle with a line through it (○) indicates the field has been selected.

2. Holding the mouse button down, move the cursor up until an [x] appears next to the cursor.

3. Release the mouse button. The **Grant Valid From** characteristic no longer appears in the report.
Adding a characteristic to a report

In this example, the Fiscal Period/Year characteristic will be added to the report from the list of Free Characteristics. This characteristic will be inserted to the right of the Revenue/Expense column.

Click on the characteristic to be added. Hold down the left mouse button. The appearance of a small circle with a line through it indicates the field has been selected.

Holding the mouse button down, move the cursor up to the Rows area. A black horizontal line appears. Position the line where you want Fiscal Period/Year to be inserted.

In this example, placing the line below Revenue/Expense in the Rows list will result in the characteristic being placed to the right of the Revenue / Expense column in the report.

The report now includes Fiscal Period / Year.

Note that the characteristic appears in the Rows list and displays as a report column to the right of Revenue / Expense in the analysis area.
Moving a Column

In this sample report view, expenses are grouped by Fund Center. That is, GL / Commitment Items are displayed for each Fund Center. Suppose you want to view GL / Commitment Item across all Funds Centers. That would allow you to see what the total expenses are for each GL / Commitment Item.

To accomplish this, we will move the GL / Commitment Item column to the left of the Funds Center column.

Click on GL / Commitment Item in the Rows list. Hold down the left mouse button. The appearance of a small circle with a line through it indicates the field has been selected.
While continuing to hold the mouse button down, move the cursor up within the **Rows** area. A black horizontal line appears. We want to position **GL / Commitment Item** to the left of **Funds Center**, so move the cursor up until the line is above **Funds Center**.

In this example, placing the line above **Funds Center** in the **Rows** list will result in **GL / Commitment Item** being placed to the left of the **Funds Center** column in the analysis area of the report.

In this new position as the left-most column, **GL / Commitment Item** now controls the grouping and sorting within the report. The result is **GL / Commitment Item** actuals are displayed for each Fund Center in the report.

Note that **GL / Commitment Item** appears at the top of the **Rows** list, which corresponds to the left-most column in the report.

**Results and Next Steps**

None