

# Introduction

#### Description

When using Business Warehouse (BW) reports, situations will arise in which you must enter a value to run a report or to filter data. If you don't have the required information readily available, you can use the technique described in this document to look up that information.

#### Prerequisites

None

### Menu Path

None

#### Transaction

None

### **Tips and Tricks**

- It may be necessary to increase the Maximum Records count to find what you are looking for. <u>Example 1</u> demonstrates this.
- The text column of the filter function is <u>not</u> case sensitive. Search strings can be entered in upper-, lower-, or mixed-case form.
- When specifying search strings, find a balance between strings that are too long and too short. Entering a
  short string frequently results in the return of an overwhelming list of matches. Entering a long string, on the
  other hand, may be too specific and might omit valid items from the results list. Example 2 demonstrates how
  string length can affect search results.

## **Referenced Help Guides**

- BW How to Filter Report Data
- BW How to Use Wild Cards in Searches

### Instructions

The following examples demonstrate how to find an employee name or a group of **Commitment Items**. Although you may not need to search for exactly these items, the method is applicable to any situation in which you need to search for data values to be used in a BW report Variable entry screen or filter.

### List of Examples:

- 1. Search using Text find an employee using part of their name
- 2. <u>Search using Text find a Commitment Item based on a description</u>
- 3. Search using a Key find a Commitment Item based on its numeric key



## Example 1: Searching for an employee

Business need: the Employee Profile report (in Human Capital Management / Personnel Administration) has a single required field on the Variable entry screen: employee personnel number, or pernr (a unique internal identification number for personnel assigned by the system).

Assumption: we have an employee name but don't know their Personnel Number.

Solution: search for the employee by name to determine their pernr.

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spelled the name correctly –add two or more zeros to the Maximum Records value and press the <b>Refresh</b> button		spelled the name correctly –add two or more zeros to the Maximum Records value and press the <b>Refresh</b> button

<sup>&</sup>lt;sup>1</sup> The Help Guide <u>BW How To – Use Wild Cards</u> in Searches describes the various ways wild cards can be specified when searching a numeric or text string



Max	Maximum Records: 100000 Refresh				
	Employee.: Keya*	Employee.: Texta*	Personnel Area: Texta?		
7		*stark*			
	10595	KYLE STARKWEATHER	Charles River Campus		
	12416	JEREMY STARK	Charles River Campus		
	20920	JANE STARKMAN	Charles River Campus		
	22483	RACHEL STARK	Boston Medical Ctr		
	46131	THOMAS STARK	Charles River Campus		
•			<b>)</b>   4   1		
inter	a value for:				
mole	ovee ·				

In the list of names returned, click anywhere on the row containing the name you were searching for.

Click the **OK** button to select the employee and to return to the Variable Entry screen.

Note: in this example, it was necessary to search 100,000 records to find the employee name.

## Example 2: searching the Commitment Item text description to find specific items

Business need: we want to modify a report to limit the data displayed to show only expenses related to the purchase of supplies.

Solution: filter the **Commitment Item** Characteristic to see all that make a reference to "supplies" (or some variant of that term) in the description.

Commitment	itom :		
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This example assumes you have already run a BW report and are now in the process of filtering on **Commitment Item**<sup>2</sup>.

 <sup>&</sup>lt;sup>2</sup> Refer to the online help document <u>BW How to - Filter Report Data</u> for more information on filtering.
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All								
Mao	imum Records: 1000 Refresh							
	GL/Commitment item Key (Partially Compounded)**	GL/Commitment item: Text#=	Commit item cat : Key					
8		"supp" X						
	500010	FACULTY FULL TIME	3					
	500020	FACULTY PART TIME	3					
	500030	FACULTY OTHER	3					
	500070	SUMMER SALARY OB	3					
	500210	EXEMPT FULL TIME	3					

Select	value	es for GL/Commitment item (0CMMT_ITEM)			
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	7		*supp*		
		510010	SUPPLIES	3	
		510020	CONS SUPPL-CFF/WTR	3	
		510030	CONS SUPPL-OFFICE	3	
		510040	CONS SUPPL-RES LAB	3	
		510050	CONS SUPPL-RES AN RS	3	Add 🕨
		510070	CONS SUPP-FAC/MNTN	3	Remove
		510040 510050 510070	CONS SUPPL-RES LAB CONS SUPPL-RES AN RS CONS SUPP-FAC/MNTN	3 3 3	Add Remov

Click in the Text column of the highlighted filter row.

Enter **\*SUPP**\* to search for any **Commitment Item** containing the letters "SUPP." The wild card characters (\*) indicate any combination of characters may precede or follow the string we are searching for.

Press the **Return/Enter** key on your keyboard or click the **Refresh** button to begin the search.

Note the various forms of "supply" the search string matched: "**supplies**", "cons **suppl**", and "cons **supp**". This points out the importance of specifying a string that is long enough to avoid any superfluous matches, but not so long that the data you are looking for is missed (e.g., entering "suppl" would have missed the Consumable Supplies GL).

Click the **Select All** checkbox to select all of the items in the list.

If you don't want to filter on the entire list, click specific items to include them in the filter.

Click the Add button to move the selected items to the Selections column.

All	- 1		Selection	S
Maximum Records: 1000			Select A	u 🔲 📕
Select All			Туре	Description
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<b>&gt;</b>	-1			
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Enter a value for:				
			🔳 🔺 Ch	ange Order 💌 🔳
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Once the selected items have been added to the **Selections** column, click the **OK** button to activate the filter.



#### Example 3: search using numeric Key to find particular Commitment Items

*Business need*: we want to filter **Commitment Item** to display only ISR and FSR activity in a detailed list of expenses. We know that that the account numbers for these items all begin with 89.

Solution: search the Commitment Item key field for any transaction number that begins with 89.

GL/Commitment ite	m≞		S
479999	Back	•	(18.500) (1
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Result	Hierarchy	۲	Variable Screen
500730	Broadcast and Export	•	
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509004	Personalize Web Application	•	
510010		-	7,200
510020	Properties	•	

report and are now in the process of filtering on **Commitment Item**<sup>2</sup>.

This example assumes you have already run a BW

Enter **89**\* in the filter column for **Commitment Item** key.

Because we know ISRs and FSRs begin with 89, we specify only a <u>trailing</u> wild card character (\*). If we bracketed our search string with a leading and trailing wild card character as we did in the previous example, our search would return any number that contained 89, regardless of where in the sequence it appeared.

Hit the **Return/Enter** key or press the **Refresh** button to begin the search.

alues for GL/Commitment item (0CMMT_ITEM)							
Show	tool: Single values Show view: All	v					
All							
Maximum Records: 1000 Refresh							
	GL/Commitment item: Key (Partially Compounded)≜ <sup>∓</sup>	GL/Commitment item: Short Text $\mathbb{A}^{\mathbb{T}}$	Commit.item cat.: Key at				
7	89*						
	890100	ISR: CATERING	3				
	893290	ISR: IS&T TELECOM SE	3				
	893600	FMP: CUSTODIAL	3				
				Add 🕨			
				Remove			

Click the **Select All** checkbox to select all of the items in the list. If you don't want to filter on the entire list, click specific items to include them in the filter.

Click the **Add** button to move selected items to the **Selections** column.





Once the selected items have been added to the **Selections** column, click the **OK** button to activate the filter.

# **Results and Next Steps**

None