Introduction

Process and Trigger

Every Business Warehouse Saved View is tied to a specific report (aka Query). When reports are deployed as replacements to existing reports, any Saved View associated with the report being replaced will no longer work because the report to which it is tied will no longer exist.

There is no BW mechanism that will enable you to make a copy of a View and edit that copy to point to one of the new reports. The best way to preserve the elements of your View is to make note of the characteristics of that View, including variables specified, layout, filtering applied, sorting, and subtotaling. This document provides instructions to outline and describe that process so you can later recreate the View.

Tips and Tricks

- You may not need to recreate all of your saved Views. Use the instructions described in this document only for Views associated with reports that are being replaced.

Help Resources

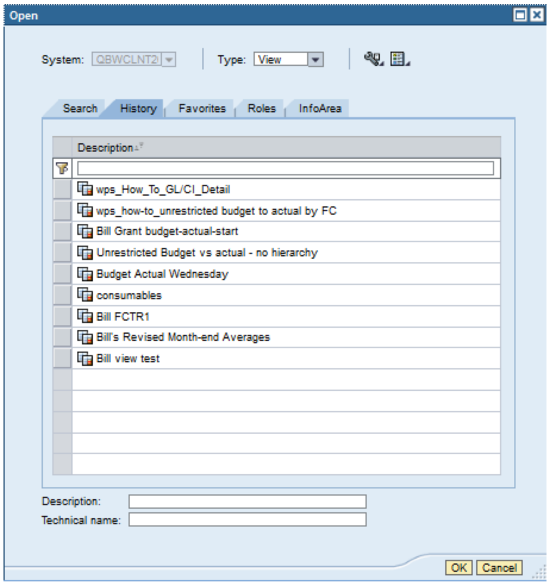
For more information about saving and retrieving Views, refer to the Help Guide [BW How to - Save and Use a View] or this video: [How to Create and Use a View].

Instructions

1. Find and Run the View to be Replaced

Navigate to the Reporting home page on the BUworks portal.

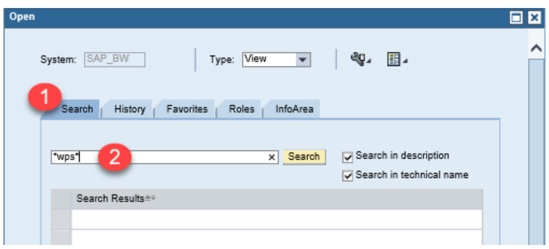
1. Click on the *Reporting* tab to open the Reporting home page.
2. Click on *Saved Views*.



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

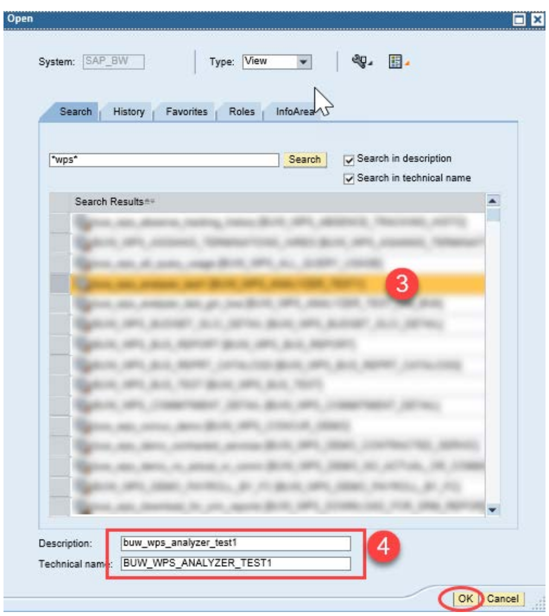
This list may be sufficient to identify any view(s) you will want to recreate.

Remember, you need to recreate Views only for those reports that are being replaced.



If you don't see the View(s) to be replaced, use the *Search* tab (**1**) to find it/them.

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



Click to select your View from the resulting list (**3**)

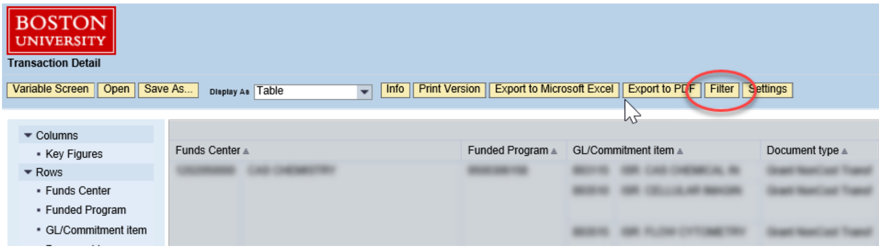
Confirm this is the View you seek based on the Description and the Technical Name displayed (**4**)

Click **OK** to run the View

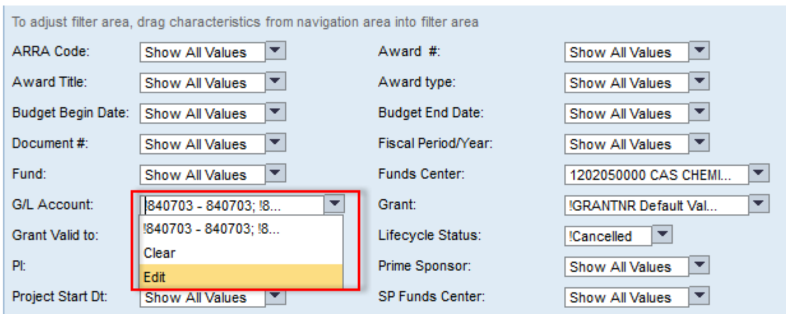
2. Note the View Layout

Make a note of which characteristics and attributes are in the View, the order in which the columns are displayed, whether the report contains subtotals or a grand total, etc. To do this, run your View as you ordinarily would. Recommended: if the report output will 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 to an Excel file so you can refer to it when recreating your View.

3. Note Any Applied Filters



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



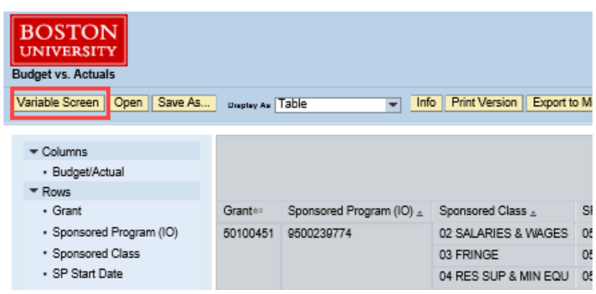
A display like this will result.

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

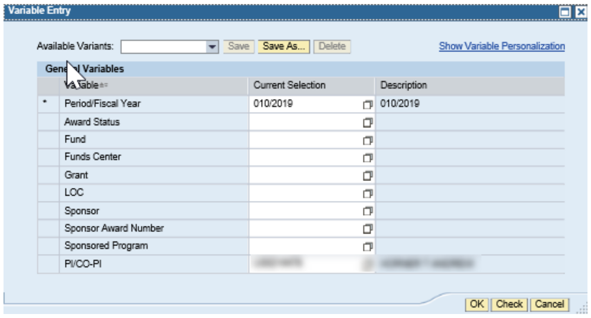
In this example, a filter has been applied to **G/L Account**, **Funds Center**, and **Grant**. To see what filter values were specified, click the drop-down arrow and click on *Edit*. Make note of the filter elements.

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 query, make a note of the filter value. When you run the new 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.

4. 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 the View (you have presumably received word that the new report is in place and Views can be created):

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

   Use the variables you noted in Step 4 to run the report. Once data is displayed, modify the report output based on the layout and filters (steps 2 and 3) originally applied to the View being replaced.

2. **Save the modified output as a new view.**

   If you need a reminder on how to save a View, review the steps outlined in the Help Guide BW How to - Save and Use a View or this video: How to Create and Use a View.

Results and Next Steps

None