Introduction

Description

The ability to modify a report – adding or removing data, changing the sorting/grouping order, filtering, and so on – is a powerful feature of Business Warehouse (BW) reporting. It is possible to store those changes by saving a report **View**. Once a View has been saved, it can be reused, thereby eliminating the need to repeatedly make the same changes every time you want to run the same report.

A View is a template or framework within which report data is displayed. Like any BW report, the displayed data is circumscribed by parameters specified at runtime and by a user's authorizations. A saved View includes column locations, applied filters, subtotals, etc. However, data is not saved as part of the View.

This document describes how to (1) create a saved View, and (2) how to recall and execute a View once it has been saved.

Prerequisites

The user should be familiar with navigating the Business Warehouse environment and with the basics involved in running BW reports.

Menu Path

None

Transaction

None

Tips and Tricks

- Saved Views are visible to all users with access to the Business Warehouse and any View can be executed by anyone with access, regardless of who created that View. However, the data displayed when running the View will be determined by the permissions of the individual running the report.
- Saved Views cannot be protected from modification by any user with access to a View. For this reason, it is important that anyone attempting to save a View use care not to overwrite another user's View. Protecting against accidentally overwriting another user's View is described in detail in the section Save a View below.
- There is no limit on the number of saved Views a user can create.
- Users cannot directly delete their own saved Views. However, any View marked using the procedure described in the Help Guide BW How to - Delete a Saved View will be removed by a system utility run by the BW development team.

Referenced Help Guides

- BW How to - Delete a Saved View
- BW How to - Use Wild Cards in Searches

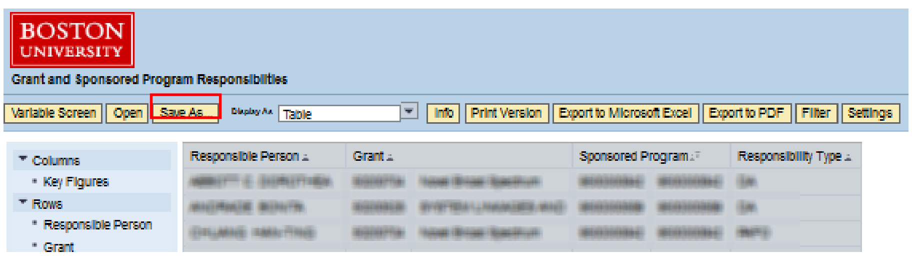
Procedure

Click on the link below to navigate to the desired topic in the Work Instruction.

#	Topic	Description
1	Save a View.	Save the View of a report using recommended naming convention.
2	Recall and execute a saved View.	This instruction describes the most common procedure to recall and execute a saved View.
3	Displaying properties of a saved View.	This technique will help determine if the View you are using is your own.
4	Editing your View and re-saving it.	Use this technique to edit and save one of your previously saved Views.
5	Using Open to recall and execute a saved View.	This technique should be used when executing a View created for a drill-down report.

Save a View

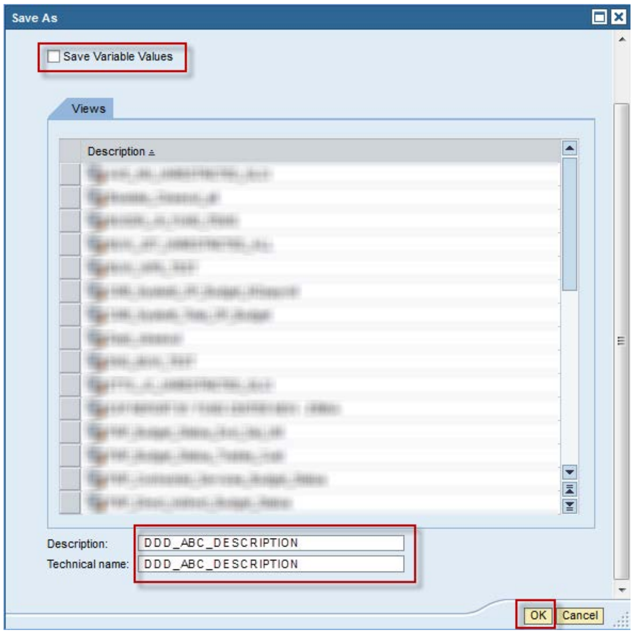
1. This document assumes you have run a BW report, have modified the initial display, and now want to save those layout changes[1].



2. Click the **Save As** button

The **Save As** window is displayed.

[1] Data in this Help Guide have been deliberately blurred



3. Click **Save Variable Values** to uncheck the checkbox.

   Unchecking this box *may* result in values you specified at run time not being saved with the View. As a result, you would be prompted to enter variable values each time you use the saved View (for example, to allow you to specify fiscal period).

   Note that unchecking this box will have no effect if any of the variables on the Variable Entry screen are pre-populated. Virtually all BW reports currently have at least one variable that has been assigned a default value, e.g., a date field. In the majority of cases, therefore, unchecking this box will have no effect.

4. Enter a **Description** for the saved View.

   There is no naming requirement, but there is a recommended naming convention:
   DDD = acronym to identify your department or organizational unit.
   ABC = your initials.
   DESCRIPTION = brief description of the View

   Note: we recommend using underscore characters ("_") instead of blanks to separate description elements.

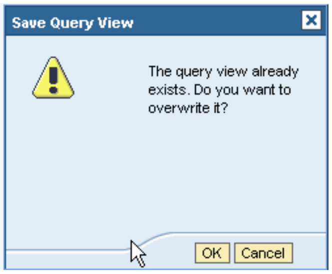
5. Enter the **Technical name**. For the sake of simplicity, we suggest that you copy the text from the **Description** field and paste it in this field, although this is not a requirement.

Requirements for the Technical Name

- The name must be unique. No other View in the Business Warehouse – whether it is yours or another user's – can have the same name.
- Only letters, numbers and underscores are allowed in the Technical Name. Note that spaces (blanks) are *not* allowed.

6. Click the **OK** button to save the View. If no error messages result, the View was saved successfully. If an error message occurs, you will need to correct the error and try saving the View again. The most common error is due the Technical Name containing one or more invalid characters, especially spaces.

7. If a warning message like the following is displayed when the **OK** button is clicked, **STOP!**

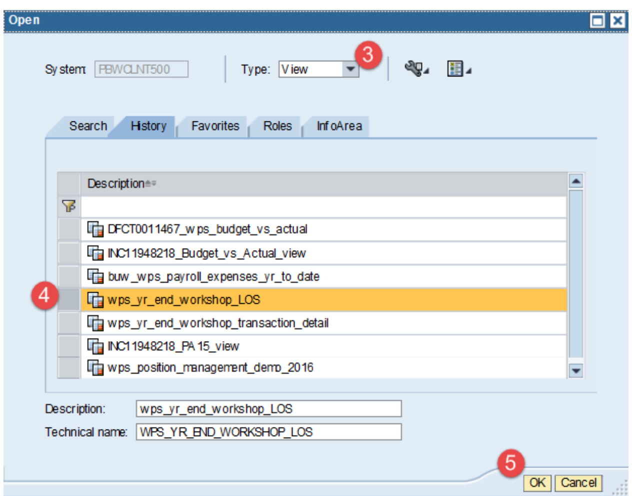


This message indicates either that you are about to overwrite your own or another user's saved View. If you are sure that you are modifying your own View and this is the View you intended to modify, then click the OK button. Otherwise, press the Cancel button and use a different technical name.

Refer to [Displaying properties of a saved View]() for instructions on clarifying whether or not this is your View.

Recall and execute a saved View

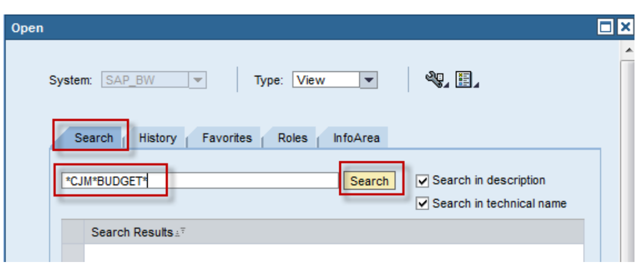
1. Navigate to the Reporting home page.
2. Click the **Saved Views** link.



3. Be sure **Type** is set to *View.*

   The History tab is opened by default. This is a list of views you have used previously. The most recently used View is the first item in the list.

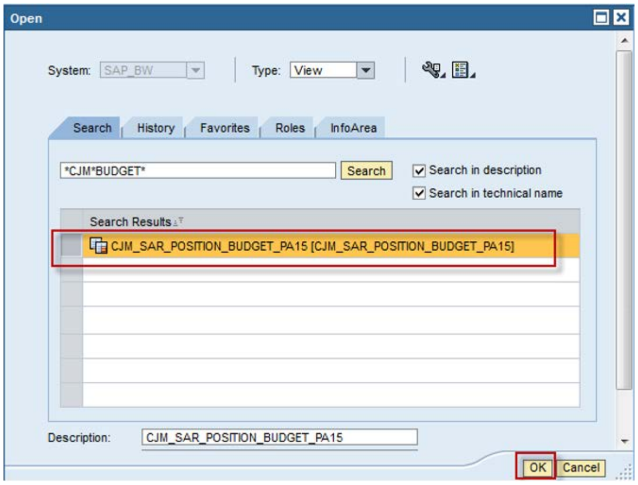
4. If the View you are looking for is in the displayed list, click to select the View and click the **OK** button to run that View (**5**).



5. If the View you seek is not in the displayed list, you will need to find it. Click the **Search** tab.
6. Enter part of the View name that you are looking for, such as ***CJM*BUDGET***.

The wild card characters ("*) indicate that the search string can be preceded or followed by any other characters or numbers[2].

7. Click the **Search** button.

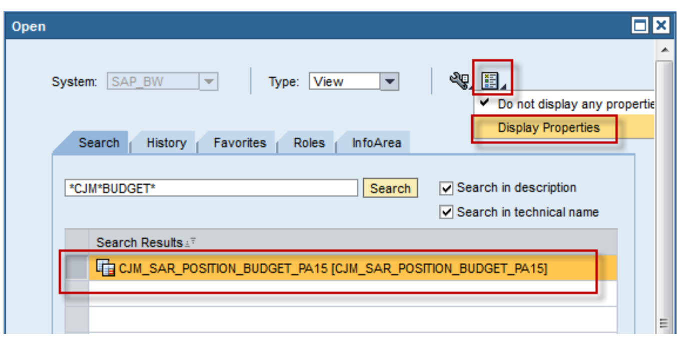


8. Select the View you are searching for.
9. Click the **OK** button to run the View.

Displaying properties of a saved View

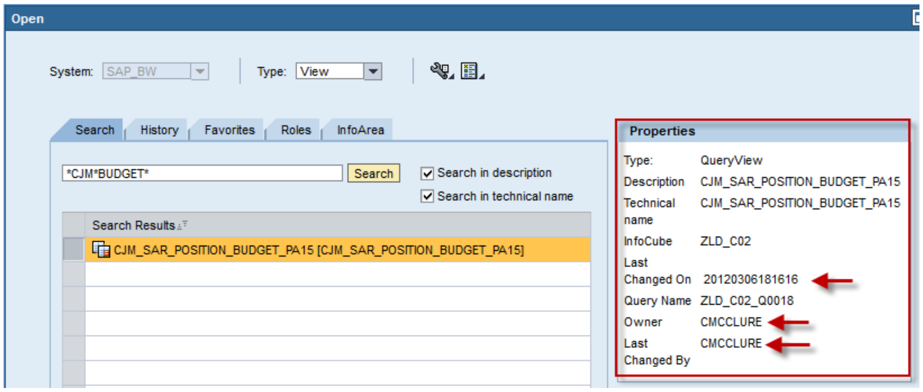
Use the **Display Properties** command to see information for a saved View. This feature allows you to see who created and/or modified a View and is particularly useful to ensure that – in the event you want to modify and re-save a View - you are working only with your own View. Properties of saved Views include the following information:

- Technical name.
- Date the View was last modified (date format is YYYYMMDD).
- Owner of the View (**confirm it is yours!**).
- Userid of last person to modify the View.



1. From the **History** or **Search** tab, click to select a View to inspect.
2. Click the **View Properties**  icon.
3. Slide the cursor down and select **Display Properties**.

[2] For more information about the use of wild cards with BW reports, refer to the Help Guide [BW How to - Use Wild Cards in Searches]



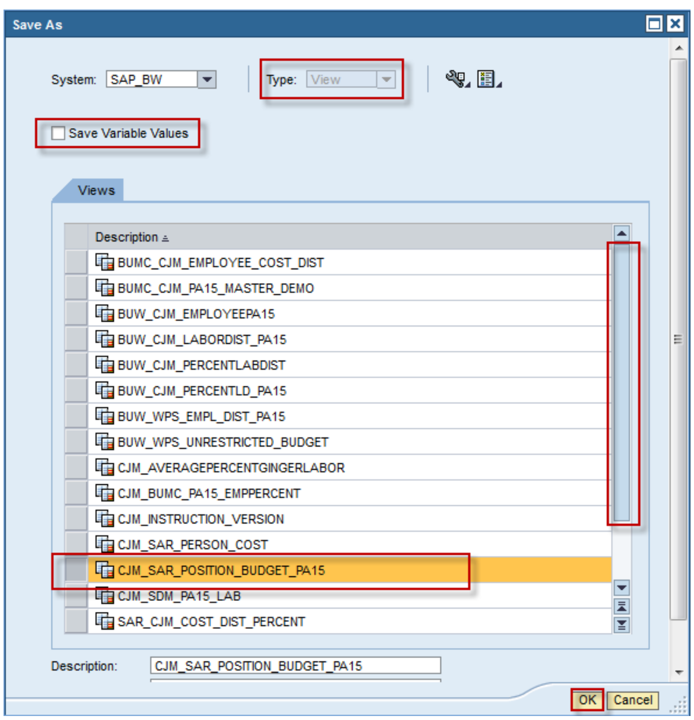
4. Properties of the selected View will be displayed.

View owner, last user to modify the View, and last date of modification are among the information available.

Editing your View and re-saving it

1. Find and execute your View using either the **History** or the **Search** tab as described previously in the [Recall and execute a saved View](#).
2. Edit the View as desired.
3. When editing is complete, click the **Save As** button.

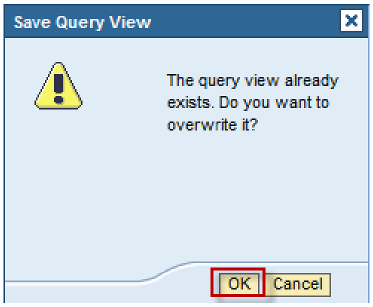
The **Save As** window is displayed.



4. Be sure **Type** is set to *View*.
5. There is no search function, so use the scroll bar (on right side of window) to scroll up or down to find the View you want to replace.
6. Once located, click to select the View.

Stop! Are you sure this is your saved View *and* it is the one you wish to replace? If yes, then continue to the next step. Otherwise, follow the instructions in [Displaying Properties of a Saved View](#) to display View properties and ensure you have selected the correct View.

7. Click **OK** to save the View



A warning message is displayed.

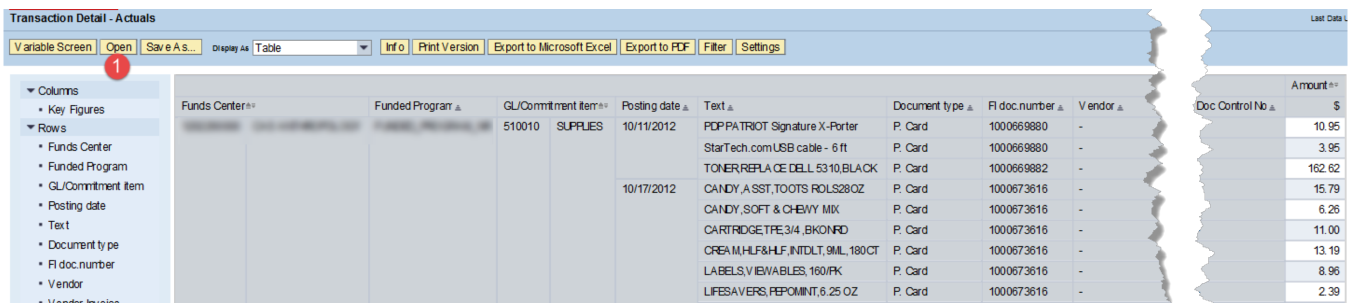
8. Click **OK** to overwrite the previous version of your View.

Using Open to recall and execute a saved View

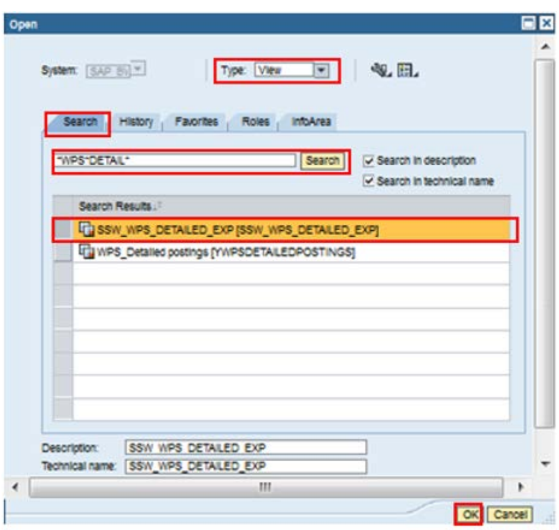
When drilling down from one Business Warehouse report to another, the detail report being drilled to opens in a default display. It is possible to create a saved View for a drill-down report, but that View must be opened manually *after* the default View has displayed.

The following example describes how to open a View based on a detail report once the drill-down occurs. The example assumes we will drill-down from the **Unrestricted Budget to Actual by FC – GL/CI Detail** report to a saved View based on the **Transaction Detail – Actuals** report.

Scenario: we have drilled-down on an expense item listed in the **Unrestricted Budget to Actual by FC – GL/CI Detail** report. The default View of the **Transaction Detail – Actuals** report is displayed initially:

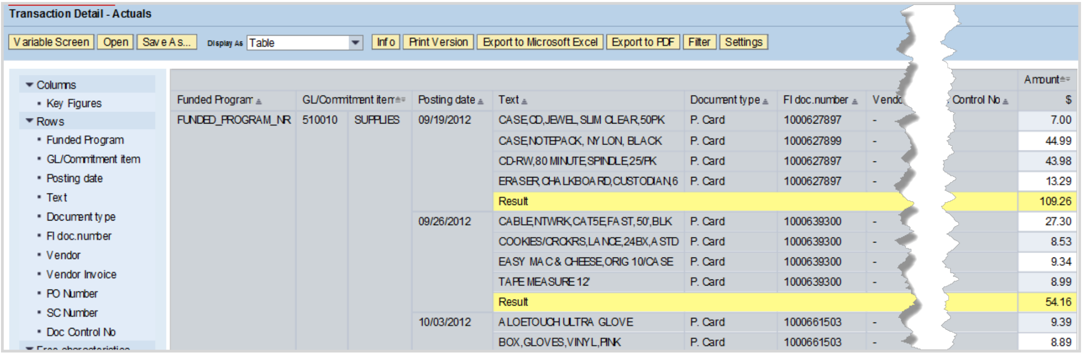


1. Click the **Open** button to open the saved View based on this detail report. The **Open** window displays.



1. Be sure **Type** is set to *View*.
2. Click the **Search** tab.
3. Enter search text to find your saved View. Use wildcard characters (“*”) before and after the text to insure that your find your View[2]. Press the **Enter** key or click **Search**.
4. Select the View to run.
5. Click **OK** to execute the View.

Sample result: data displayed in the initial View is now shown in the layout represented by the opened (saved) View.



Results and Next Steps

None