BW Reporting Newsletter

November, 2015

From the Editor

At the risk of repeating myself, I want to encourage newsletter readers to review the improvements to the BW environment due to the recent upgrade. We have published a [Web page] that includes an overview video as well as notes regarding resolution of two Firefox issues. In particular, I want to encourage you to watch the video if you haven't already done so. It only takes 3 minutes and it points out many of the new features of the new environment that you should know about.

As always, I hope you find this issue of the Newsletter informative. Please let me know if you have any questions or comments.

Bill Stewart

The Reporting team has been consumed by the recent BW upgrade, preparing for the upcoming installation of service packs (SAP system updates), and addressing tickets. As a result, there is no "big" news to tell you about this month. Suffice to say, though, that the team is continuing to work to fine-tune reports to meet employee requirements.

Some of these Tips may be new to you, while others may be familiar. Regardless, we hope you find value in these and future Tips, even if we do no more than remind you of the existence of tools you once knew about but had since forgotten.

Do you have an idea for an additional Tip? Drop me a note via email or give me a call at 617-353-6382 and let's discuss your idea.

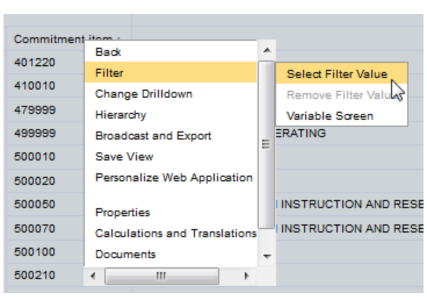
Note: all of the Tips posted in BW newsletters are archived on this page.

Searching for a value when running a report or filtering report data

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 one of the techniques described in the Help Guide BW How to – Perform an Information Lookup to find that information. The following example, which involves searching Commitment Item text descriptions to find specific items, is borrowed from the document:

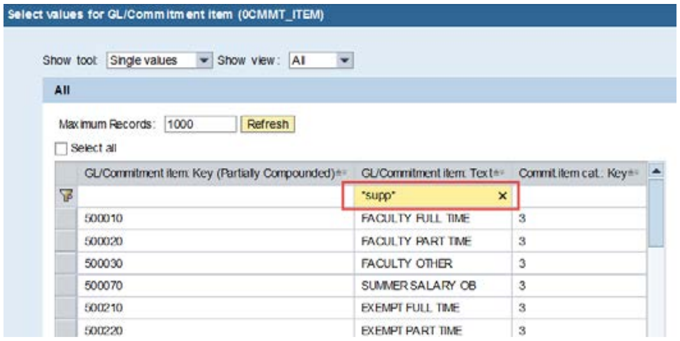
Business need: we want to modify a report to limit the data displayed to show only expenses related to the purchase of supplies.

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



This example assumes you have already run a BW report and are now in the process of filtering on **Commitment Item**[1].

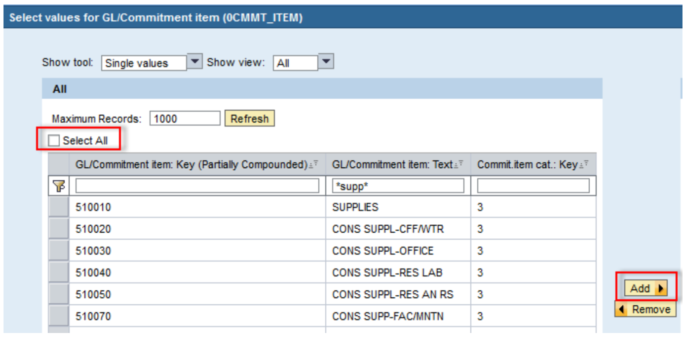
[1] Refer to the online help document BW How to - Filter Report Data for more information on filtering.



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.

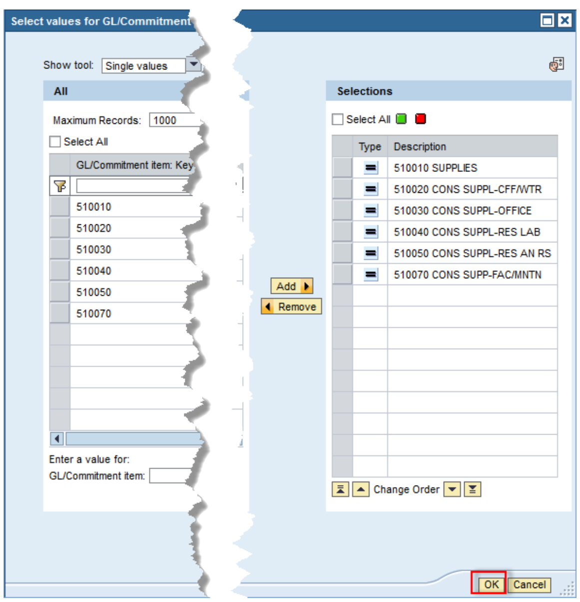
Press the **Return/Enter** key on your keyboard or click the **Refresh** button to begin the search.



Note the various forms of "supply" the search string matched: "**supp**lies", "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 Commitment Item).

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

Click the **Add** button to move the 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.

How many hours did a weekly paid employee work during a particular time period?

If you're a payroll coordinator or a manager, this is an easy question to answer. Each of the three primary Labor Distribution reports – *Payroll Inquiry by Distribution (PA12)*, *Payroll Inquiry by Employee (PA15)*, and *Funds Center Report* – display the hours worked that correspond to pay for a given period.

		Salary
Wage Type		$
3000	Regular Pay	342.42
3600	Vacation Pay	103.01
3000	Regular Pay	267.26
3600	Vacation Pay	44.55
3606	Holiday Pay	89.09

When one of these reports is run, the initial display includes the **Salary** Key Figure. Note the black triangle, which indicates this column contains additional data.

		Salary	Hours Worked
Wage Type		$	H
3000	Regular Pay	342.42	14.800
3600	Vacation Pay	103.01	4.450
3000	Regular Pay	267.26	11.550
3600	Vacation Pay	44.55	1.920
3606	Holiday Pay	89.09	3.850

Clicking on the triangle reveals the additional data – in this case, the hours attributed to various Wage Types for two employees.

That's all there is to it! Note that you can hide the **Hours Worked** column by clicking again on the black triangle.

Training Calendar

Introductory Workshops offered this month

As always, an assortment of introductory workshops will be offered this month. These sessions present to new employees – or employees assigned a new business role – the fundamentals of reporting for a particular subject area. The sessions are a great way to review material, too. Even if you previously attended an intro session, you are likely to learn new things about reporting – or to be reminded of concepts that you had forgotten.

Click on any of the following links for a course description and/or to register for an upcoming session:

Funds Management Reporting

Grants Management Reporting

Supplier Resource Management Reporting

Labor Distribution (Payroll) Reporting

Intermediate-level Workshops offered this month

As of November 10, no intermediate-level workshops have been scheduled. However, I am looking to add at least one GM workshop toward the end of the month. Stay tuned by periodically visiting these pages:

Grant Management Reporting

Funds Management Reporting

Custom Training Sessions

Have you ever thought it would be really useful if you could get members of your department together with a trainer to focus on BUworks functionality that is specific to the work your department does? I'm happy to work with any department or group that would like to develop and conduct a custom basic- or intermediate-level reporting training session. There are only two requirements for such a session: (1) input from the group is necessary to develop a relevant agenda, and (2) the group should include three or more employees. If you're interested in discussing the development of a custom session for your department or school/college, contact me via email or give me a call at 617-353-6382.

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