Recreating Your BW Favorites (Bookmarks) in Analysis (Advanced User Skills)

In BW, you have created bookmarked reports. This job aid will show you how to recreate a bookmarked Sponsored Rev-Exp Detail - Multiple Periods report in Analysis. You can follow the same steps to recreate all bookmarks, called Favorites in Analysis.

Note the Query Description name of the BW bookmarked report

Start with an open, executed, bookmarked report in BW. (Default view is on Data Analysis tab.)

1. Click the **Info** tab.
2. Note the Query Description name. (NOTE: It’s a good idea to highlight the Query Description field and hit Ctrl+C to copy it.)
3. Do not close the report. Just minimize the browser window.
Navigate in Analysis to the workspace noted in the BW Query Description field

1. Click the Enterprise Reporting tab.
2. Click the Open Analysis link.

3. Click Search.
4. Type or paste keywords from Query Description name into the Search field, and then hit the Enter key on your keyboard. NOTE: Do not use asterisks (*) here. The field is not case sensitive.
When the search results appear, double-click the report name to launch the workspace.

Display BW side by side with Analysis

Adjust the browser window for Analysis so that it covers the left half of your monitor. You should see the Prompts screen. Open the browser window for the BW report and adjust it so that it covers the right half of your monitor. You are still on the Info tab.

Click the Hide Role Menu arrow to gain “real estate.”
Adding the prompt variables

1. In the BW screen, click the **Data Analysis** tab to navigate to the report view.
2. In the BW screen, click the **Variable Screen** button.
3. Use the Change Zoom Level feature on your browser window to reduce the BW screen so that you can see the entire variable screen. Input the variables from the BW screen into the appropriate fields on the Analysis screen.

4. In Analysis, click the arrow to expand the Sponsored Program field.

5. Copy and paste the 9-digit sponsored program number from BW into the Sponsored Program field in Analysis.

6. Copy and paste the dates from BW into the From Period/Fiscal Year and To Period/Fiscal Year fields in Analysis. NOTE: The From and To dates for the commitment period have defaulted into the report.

7. In Analysis, hit Enter on your keyboard to check the data and activate the OK button.

8. In Analysis, check the Save prompt values with workspace checkbox.

9. In Analysis, click the OK button to launch the report.
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Saving your work in Analysis and executing your report in BW

As you work in Analysis, save the report immediately and frequently, so in the event that you time out during the transition process, your work will not be lost.

1. Click the Save drop-down arrow.
2. Click Save As...
3. Navigate to the folder that will contain this favorite.
4. Type a new, unique, and descriptive name or copy and paste the bookmark name from the variable screen view of BW.
5. When you save your work a second time, you can overwrite the first file.
In Analysis, the workspace tab will now show the new name of the report.

6. On the BW side, click **Execute** to launch the report in BW.

**Matching Row data in BW with the Rows area of the Analysis Layout panel**

1. In Analysis, click the **Auto Update** button.

2. Compare the rows of the BW report with the Rows area in the Analysis Layout panel. You want to make them match. So begin dragging free characteristics from the Analysis Data panel and dropping them in the Rows area of the Layout panel in the order that they appear in the BW report. For example, drag FI Doc: **Doc Number** from the Data panel and drop it underneath Sponsored Class in the Rows area of the Layout panel.
3. Continue to drag and drop free characteristics into the Rows area of the Layout panel to make the Analysis report match the BW report.

Row display in BW

<table>
<thead>
<tr>
<th>Sponsored Class</th>
<th>FI Doc:Doc Number</th>
<th>Reference Doc Number</th>
<th>Predecessor Doc</th>
<th>Item Text</th>
<th>Vendor</th>
<th>Posting Date</th>
</tr>
</thead>
</table>

Rows area in Analysis

- Sponsored Class
- FI Doc:Doc Number
- Reference Doc Number
- Predecessor Doc
- Item Text
- Posting Date
- Vendor
- Business Transaction

4. Leave the Business Transaction where it is for now. It is explained in the filtering section below.
Matching column data in BW with the Columns area of the Analysis Layout panel

In the BW report, scroll right to view the columns.
Drag the missing free characteristics (i.e., Fiscal Year/Period) from the Analysis Data panel to the Columns area of the Layout Panel in the order in which they appear in the BW report.

When you’re done adding and arranging the free characteristics in your Analysis report, click the Auto Update button to apply the changes all at once.
Applying filters

In the BW screen, scroll to the Navigation Block.

1. In the Navigation Block, click on a filter icon to view Existing Filter Values. For example, click the filter icon beside Sponsored Class.
2. In the Analysis screen, right-click on Sponsored Class.
3. From the drop-down menu, select Filter and then By Member...
4. In the pop-up window, uncheck Select Everything.
5. Check the necessary filter values so that your Analysis report will match what is in the BW Existing Filter Values list.
6. Click OK to apply the filter.

Repeat steps 1-6 for the other filtered data.
The Business Transaction free characteristic should not be displayed in this report.

1. In Analysis, right-click on Business Transaction.
2. From the drop-down menu, hover over Move to.
3. Then click Background Filter.

Business Transaction now appears in the Background section of the Layout panel and is no longer displayed in the report.

NOTE: In BW, a filter was applied on Business Transaction while in the Free Characteristics list, so that it does not display in the report.
Add sub-totals to Sponsored Class

In BW, each Sponsored Class is subtotaled.

1. In Analysis, right-click the column header immediately to the right of the one you want to subtotal. For example, right-click the FI Doc: Doc Number header.
2. In the drop-down menu, select Totals.
3. Then select Show Totals.

Repeat for all items that need subtotals.

NOTE: The default report already has Grand Total included.
Change display to include Key and Text

In BW, Sponsored Class displays by Key and Text.

1. Right-click the Sponsored Class header.
2. From the drop-down menu, hover over Display as.
3. Then click Key : Text.
Double-check row numbers

1. In BW, click **New Window** to open the report in a new window and note the number of rows.
2. In Analysis, look at the top-right side of the Results panel.
3. Compare the number of rows in each column to make sure that you are not missing any data. For certain reports, it may be helpful to double-check that the totals and subtotals match.

Save and share the report with co-workers

Refer to the job aid, “Emailing a Report.”