Step-by-Step Guide: Reporting

There are two types of Buy@Duke reports, Real Time Reports and Historical Reports. The Real Time reports provide real time access to transactional data. The Historical Reports provide access to standard and custom reports. The data in these reports is refreshed nightly.

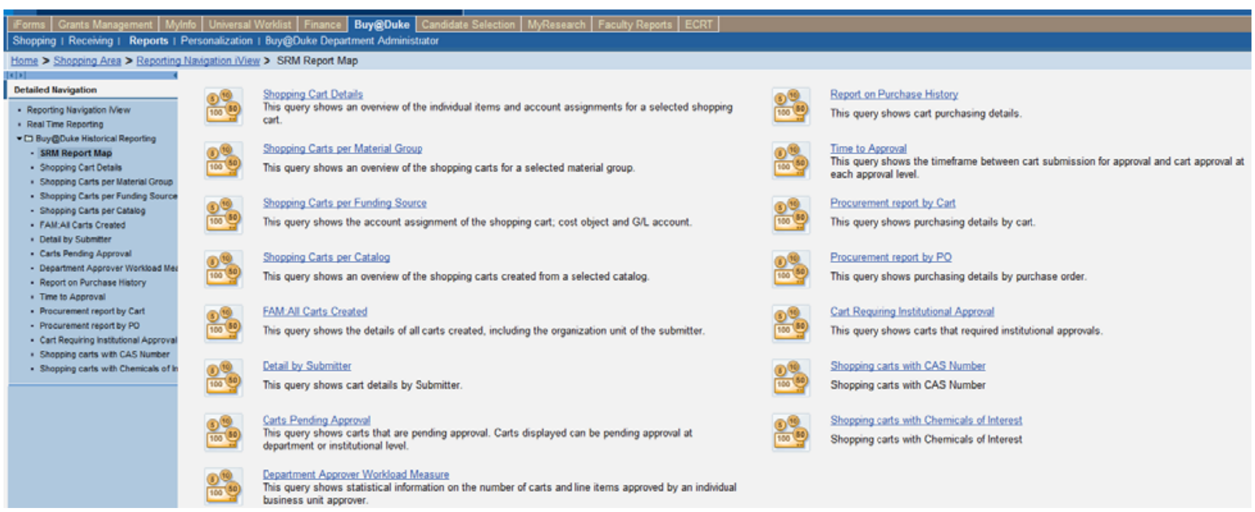
Buy@Duke Historical Reports

1. On the Reports page of the Buy@Duke tab, select Buy@Duke Historical Reporting

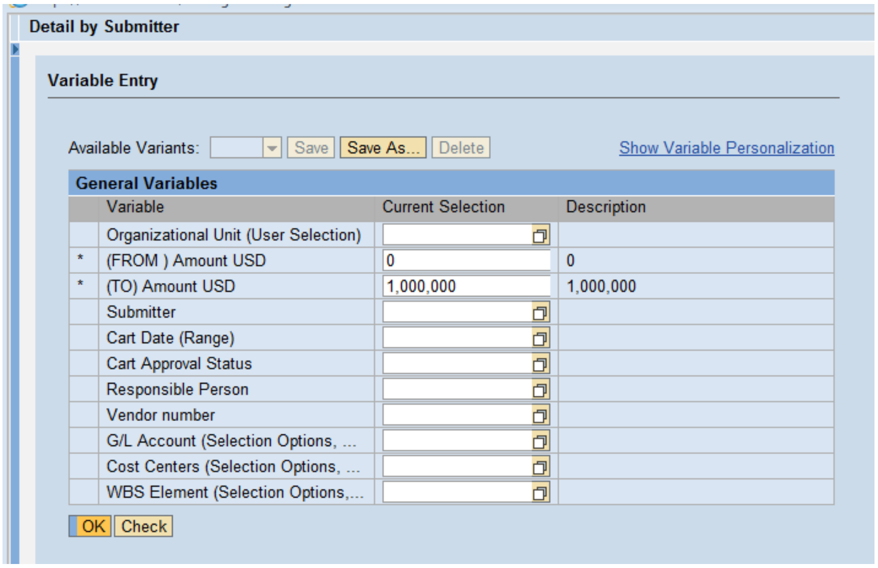
   Historical Reports include Custom Historical Buy@Duke reports and Standard System Historical Buy@Duke Report (First four reports in screen shot below). See Buy@Duke Report Summaries document for additional information. *(Add link to document)*

Variable Entry Window

2. Access the desired report from the report map.



3. Enter query selection criteria in the **Variable Entry** screen.

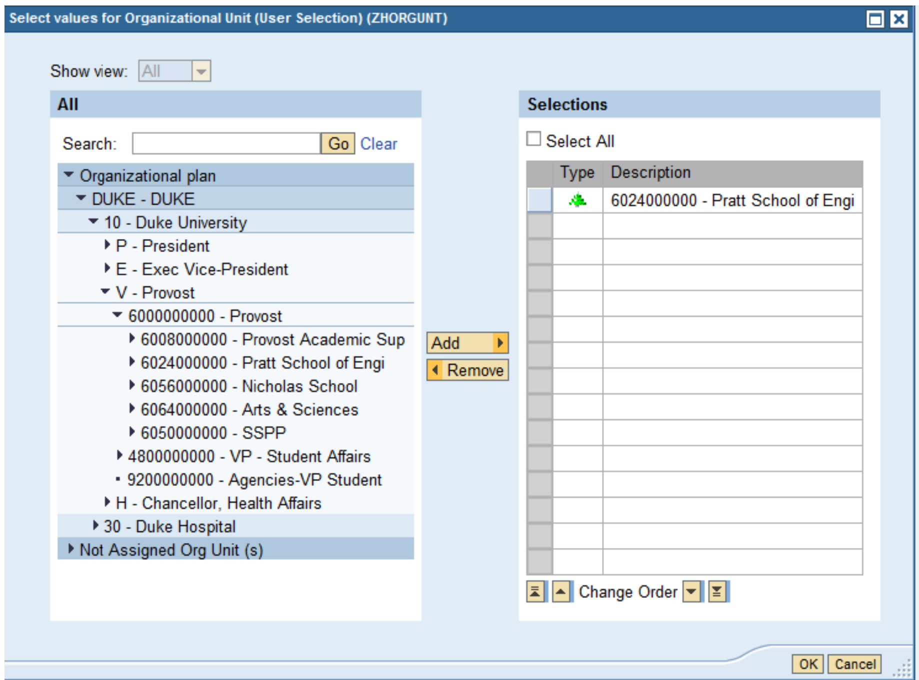


Query variants can be saved for the report with functionality similar to BEx, the Business Explorer tool for Business Warehouse. A query variant is a saved set of selection criteria that automatically populates the **General Variables**. This saves time since the same variables do not have to be entered each time you execute a query. Multiple variants can be saved.

4. To save a variant, enter the selection criteria in the Current Selection column. Then click on the **Save As** button.
5. Enter a **Description** for the variant and click **OK.**
6. If you personalize a variable, you may select it by clicking on the drop-down icon in the **Available Variants:**

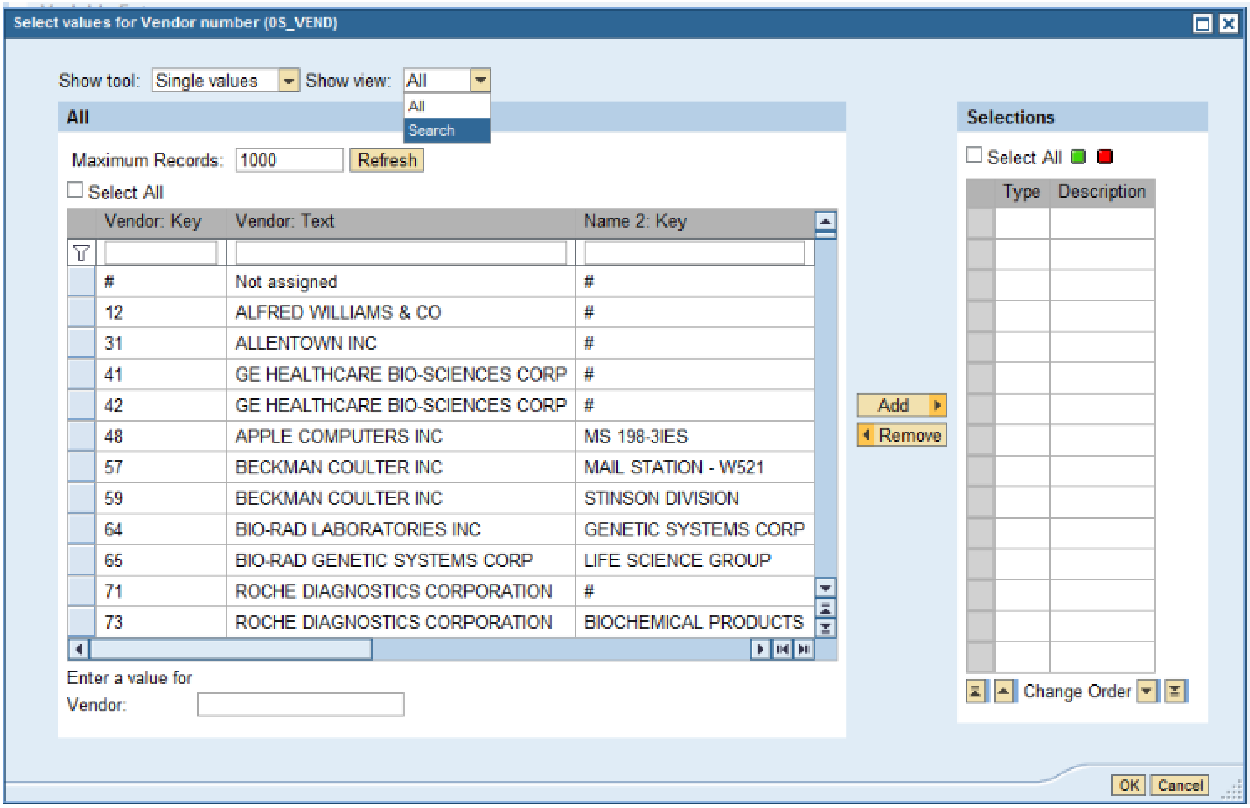
<u>NOTE</u>: Values in the Current Selection columns can be changed.

In the **Select Values windows,** move selections from the ALL column to the Selections column by highlighting a selection and using the Add button in the center of the screen. To remove a selection, highlight the item to be removed in the SELECTIONS column and click the Remove button.

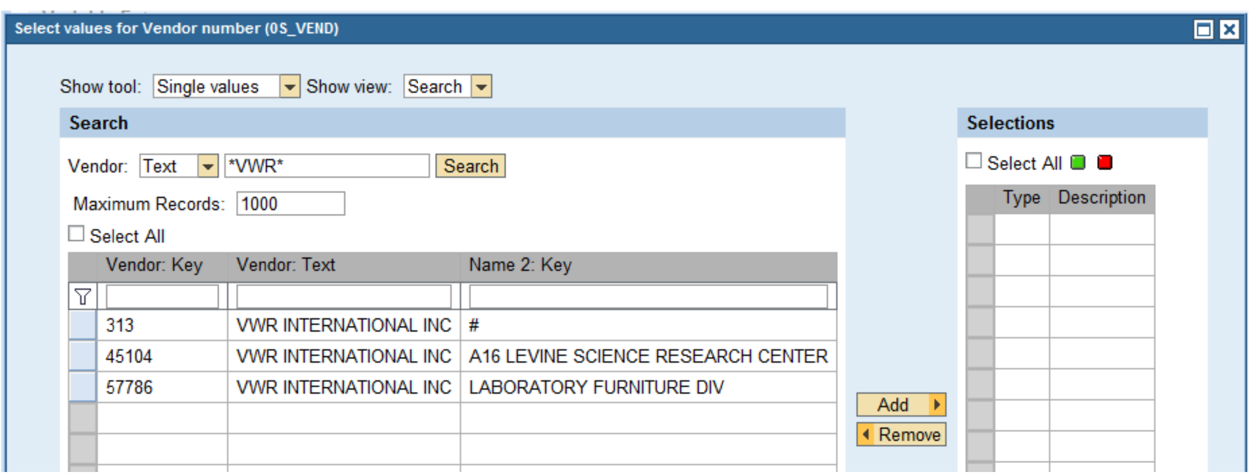


The Selections window on the right shows the Org Units that have been selected for the report.

To use the Search feature in the **Select Values windows,** change the Show view: to Search from All.



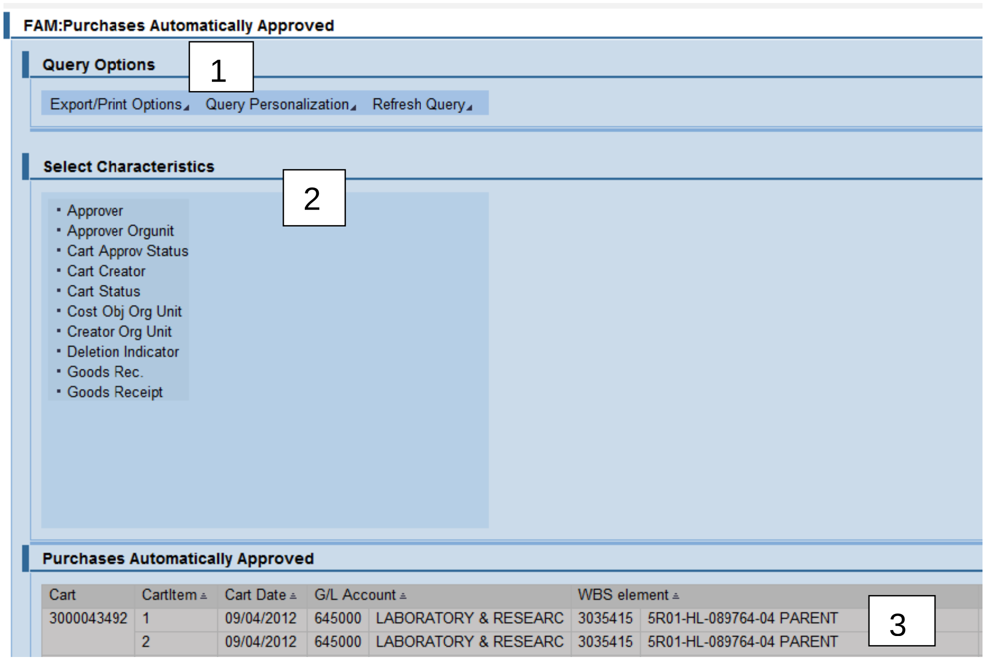
Use * before and after name to ensure complete results.



Move selections from the ALL column to the Selections column by highlighting a selection and using the Add button in the center of the screen. To remove a selection, highlight the item to be removed in the SELECTIONS column and click the Remove button.

Report Window

Once you've executed the report, you'll notice three sections.

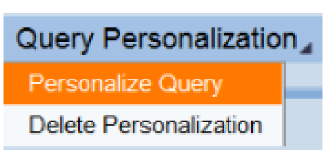


1 The **Query Options** toolbar. Here you see three functions.

a. The **Export-Print Options** menu allows you to download the report as:

- a PDF in a portrait view on a letter-size sheet; or
- a PDF in a landscape view on a letter-size sheet; or
- an Excel spreadsheet.

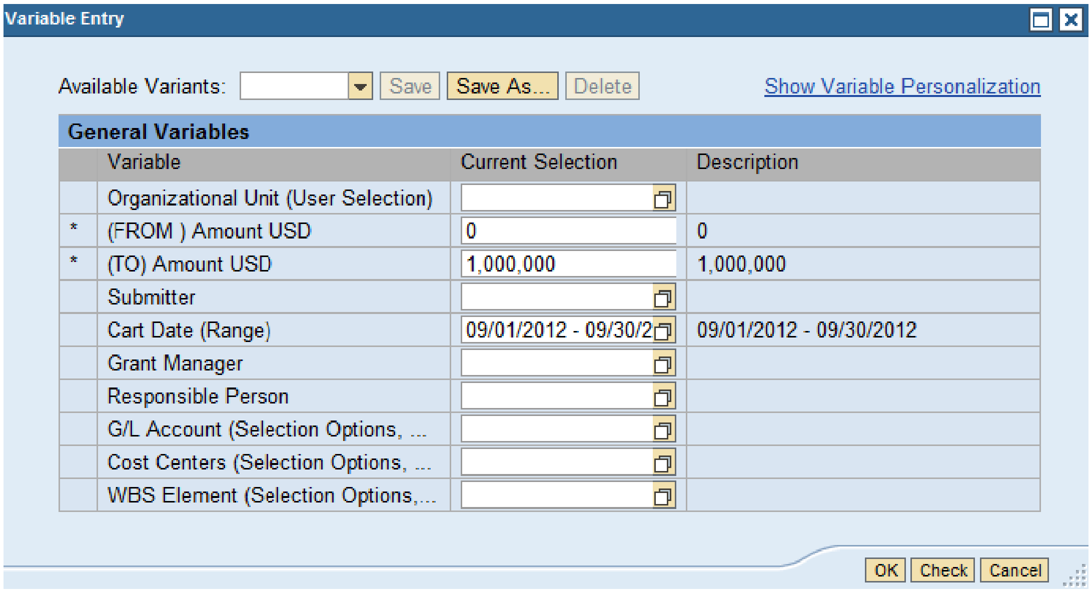
b. **Query Personalization**



If any changes are made to the standard view of the report, the revised view can be saved by clicking on **Personalize Query**. Each time the report is run in the future, the revised view appears.

If you wish to return to the standard view, select **Delete Personalization**.

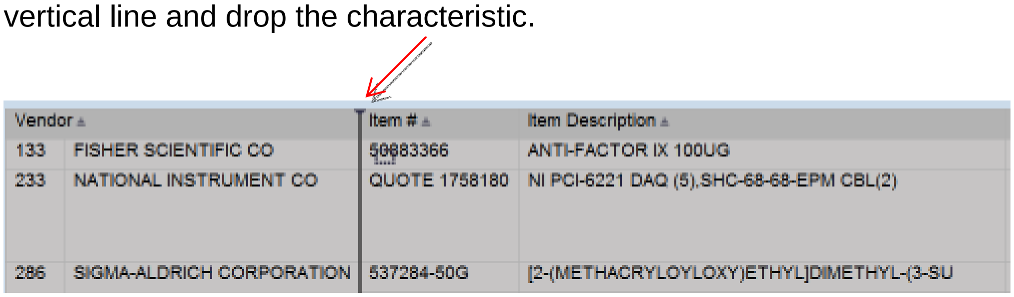
c. **Refresh Query**, opens the **Variable Entry** window. This window shows the criteria values of the current report. Using this window, new values can be entered to run a new report. This saves the time of having to return to the report map.



(2) The **Select Characteristics** section presents the characteristics options for changing the report.

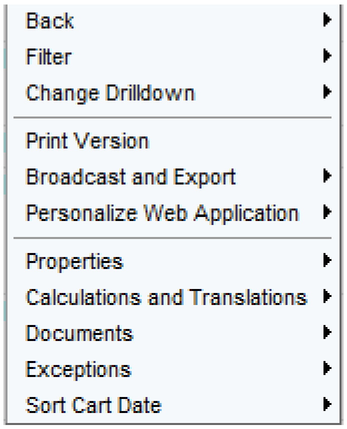
Decide which characteristic to add to the report. Pause the pointer for a moment over the characteristic and a box appears that provide instructions.

Changing the characteristics of the report is a drag-and-drop function. Select the desired characteristic, drag it into the report and place it besides the heading, resulting in a black vertical line and drop the characteristic.

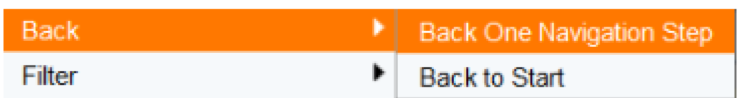


The added characteristic or any characteristic (column) can be removed from the report by placing the pointer on the column heading, holding down the mouse button, and dragging it back to the Characteristics box.

(3) The **Context Menu** is available by right clicking in the report.

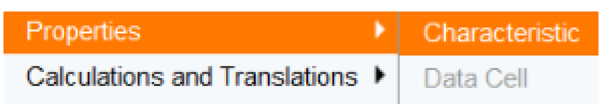


The Back selection has the option to return Back One Navigation Step or Back to Start.

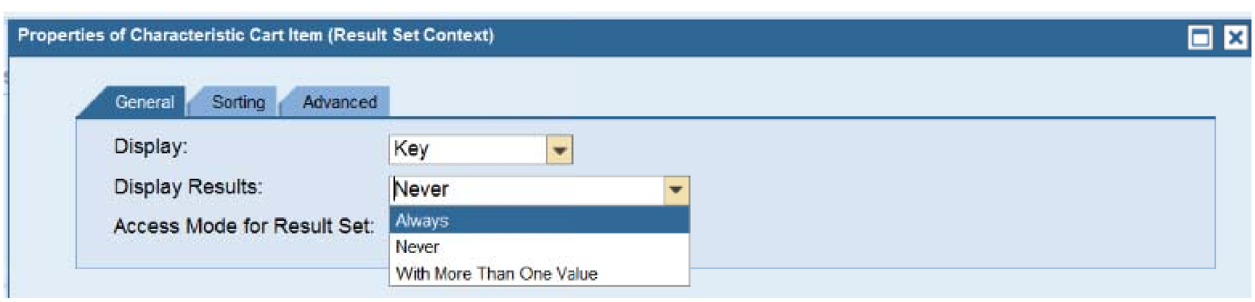


The Properties selection has the option to add subtotals in the report results.

To add subtotals, right click on the column title, select Properties, and then Characteristics.



On the General tab, click the drop down arrow for Display Results and change from Never to Always. Click OK.



The order of columns is extremely important when using this feature. Report data is sorted from left to right.

Another option for adding subtotals: Export report to Excel and use Excel subtotal functionality.

Report Security

If unable to access the Buy@Duke reports on the Reports section on the Buy@Duke tab, check to ensure that duke.edu is listed as a trusted site. If it is and you are still unable to access the reports, add bjp.duke.edu to the list of trusted sites.