Use this job aid to: navigate to, customize, and save your report.

Run a Non-Sponsored – Financial Summary

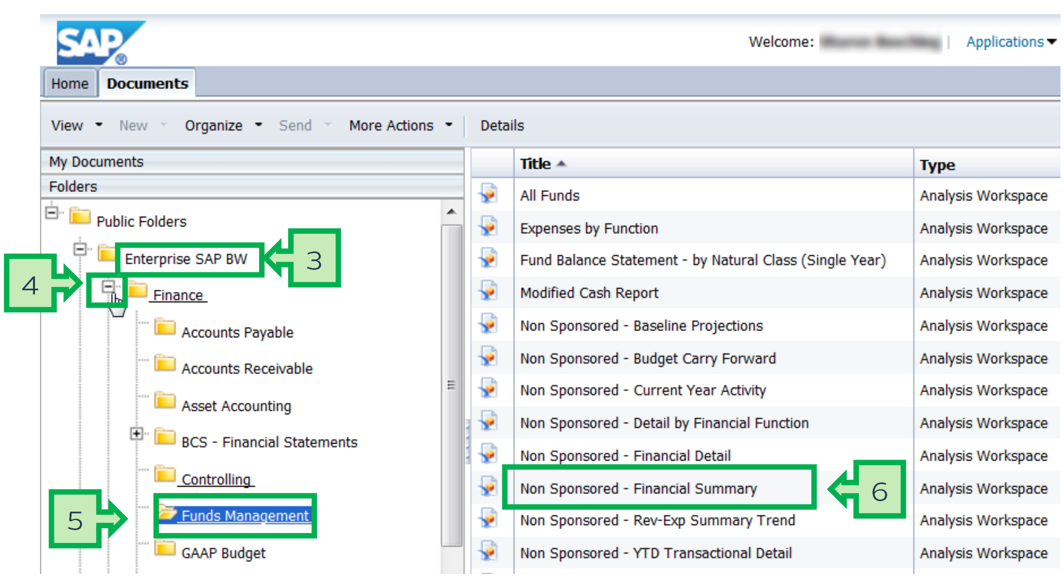
Run this report to view year-to-date/current period revenues and expenses. It includes current budget, actuals, and commitments for a specified fiscal period. This guide will show you some of the main features of the BI Launch Pad screen, including how to exit a workspace (or report).

Navigate to the workspace (Non-Sponsored – Financial Summary)

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

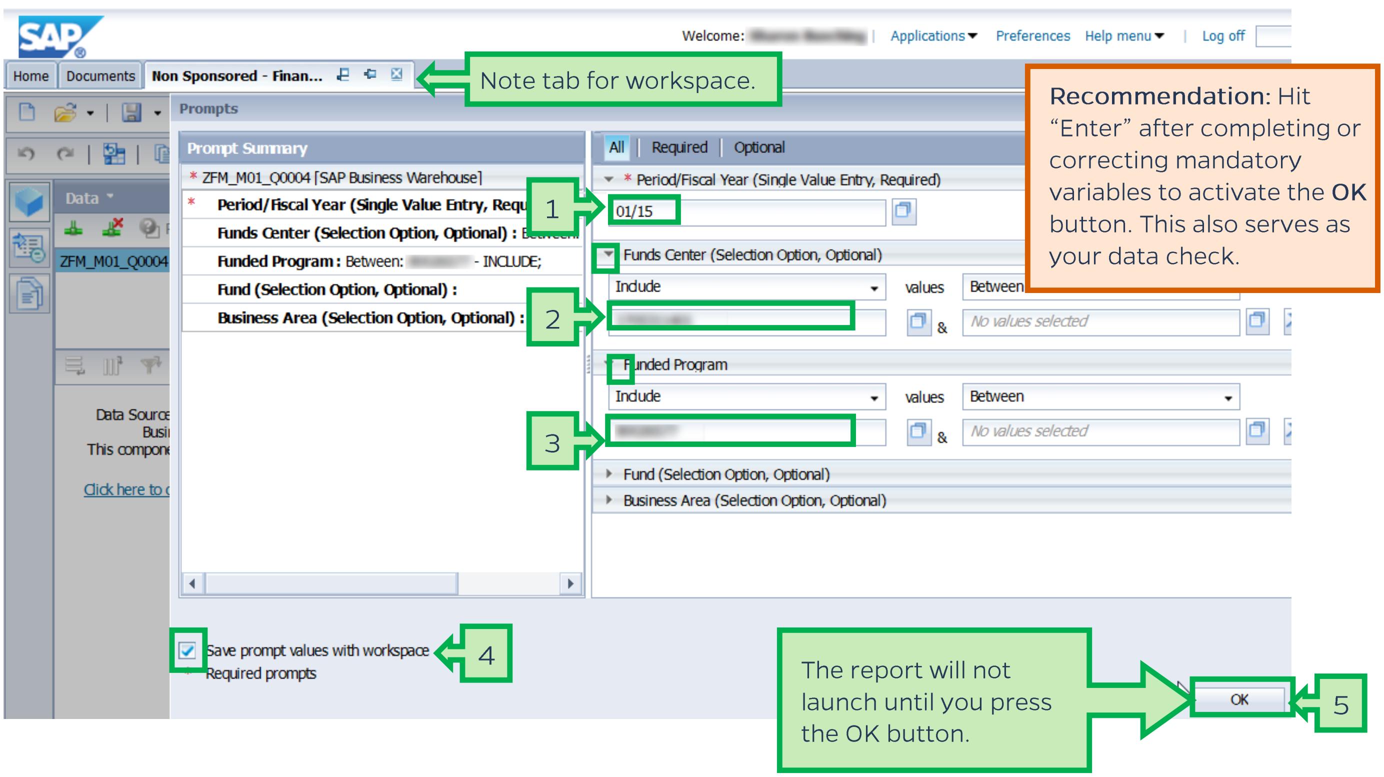
The link will launch the Business Objects Launchpad.

3. Click the ⊞ plus sign to expand the Enterprise SAP BW folder.
4. Click the ⊞ plus sign to expand the Finance folder.
5. Click Funds Management.
6. Double-click the Non Sponsored - Financial Summary workspace to open it.



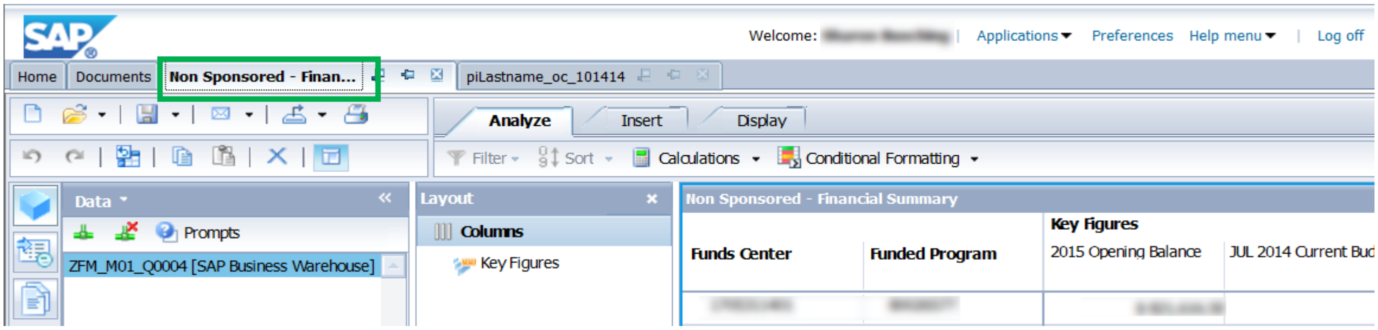
Input the variables in the Prompt screen

1. Enter the mandatory variables first. They have a red asterisk (*) next to them. Type the fiscal period and fiscal year into the **Period/Fiscal Year** field as FP/FY and then hit "Enter."
2. Click the **expand arrow** ▸ to add optional values for Funds Center. Type the 10-digit fund center number into the **Funds Center** field and then hit "Enter."
3. Click the **expand arrow** ▸ to add optional values for Funded Program. Type the 8-digit internal order number into the **Funded Program** field and then hit "Enter."
4. Check the **Save prompt values with workspace** checkbox.
5. Click the **OK** button to launch the report.



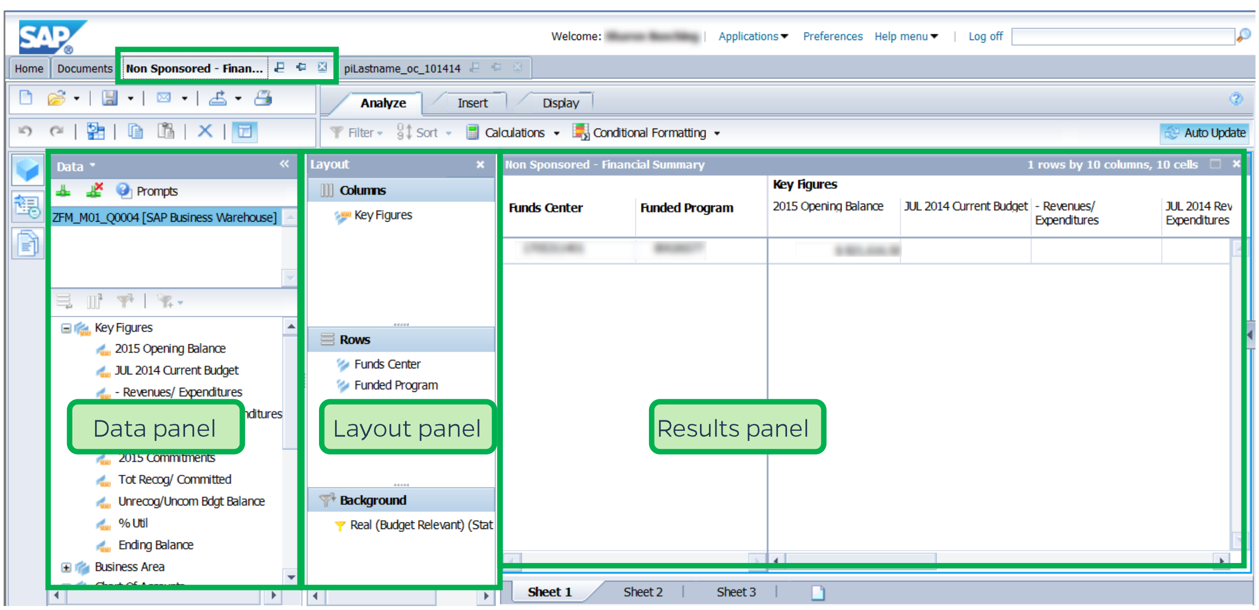
Report layout tabs

Open workspaces each have their own tab. Users can have multiple tabs (reports) open at once.
The lighter tab (on the left below) is the active workspace. For best performance, close tabs when not actively using them.



Report layout – The three sections

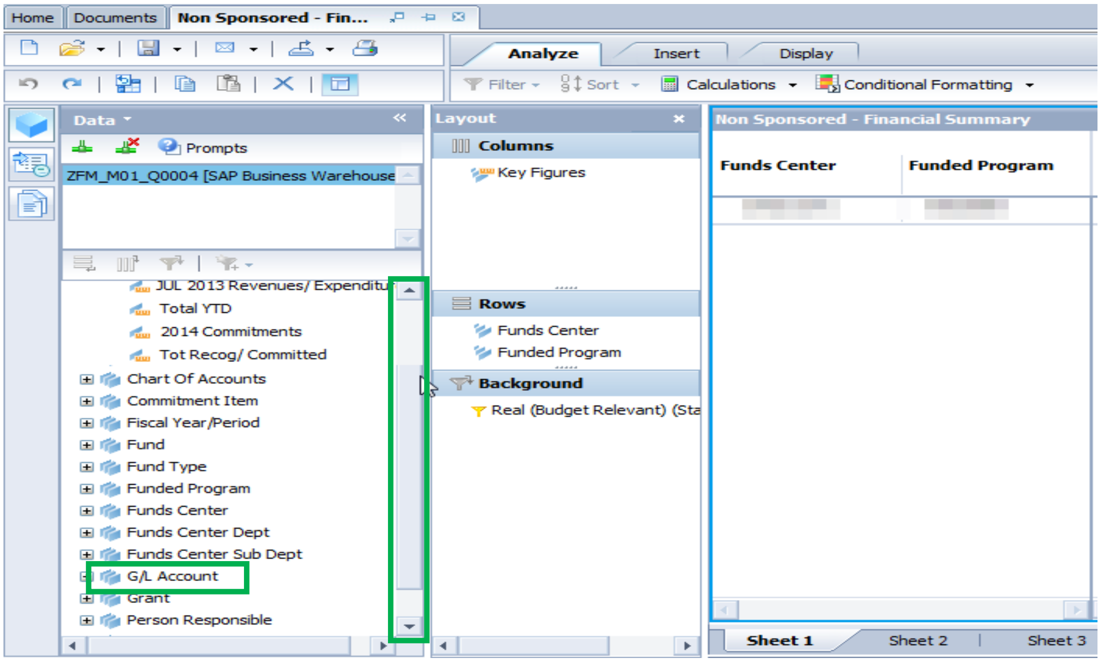
A workspace has three main sections. They are the Data panel, Layout panel, and Results panel. Each section can be closed to provide more screen "real estate." Sections can be reopened at any time.



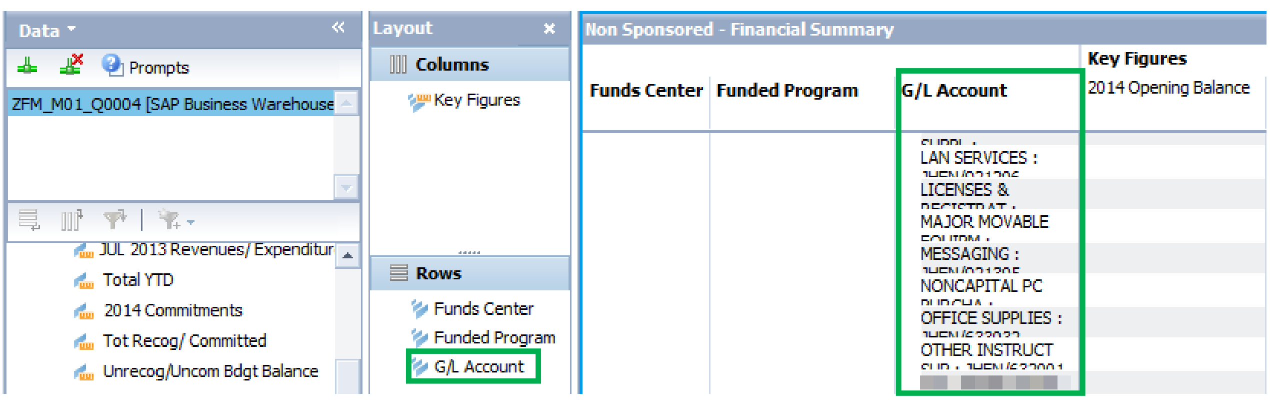
Add free characteristics

Use the scroll bar in the Data panel to locate G/L Account.

Click, drag, and drop G/L Account from the Data panel to the Layout panel under Funded Program.

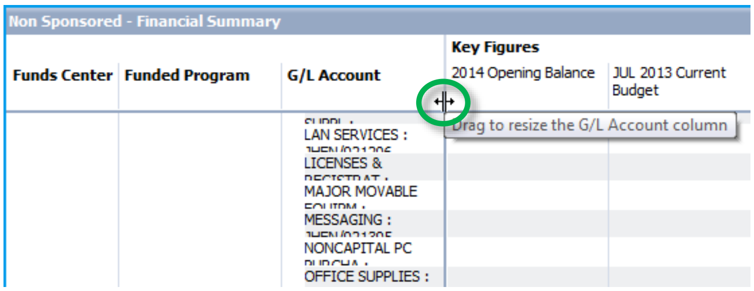


The Results panel now includes the G/L Account data.

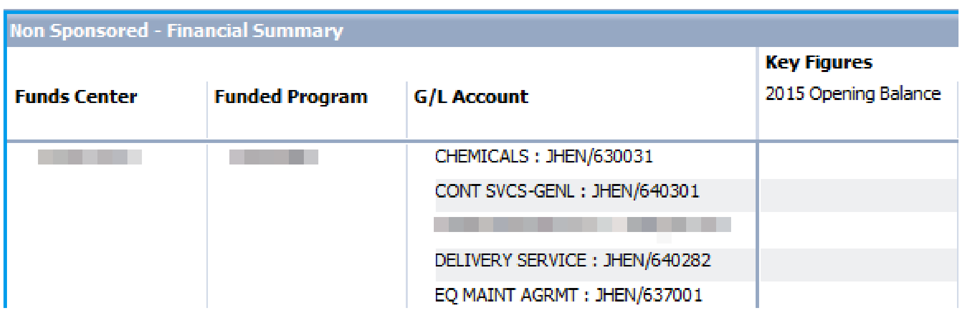


Changing the display of G/L Account from Text : Key to Key : Text

First, resize the G/L Account column by clicking on the dividing line to the right of the column header and dragging the column divider to the right.

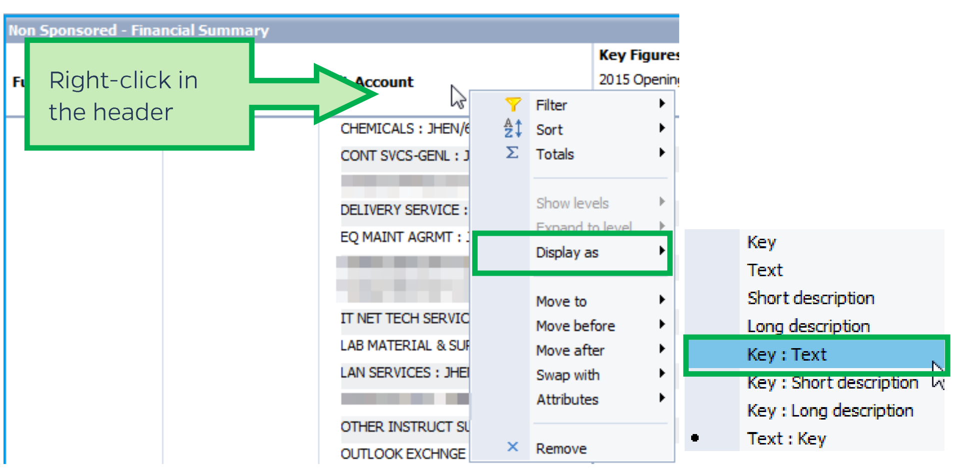


Note that when the column is expanded (below) the G/L Account is sorted alphabetically by text, and the key (the G/L Account number) is after the text description.

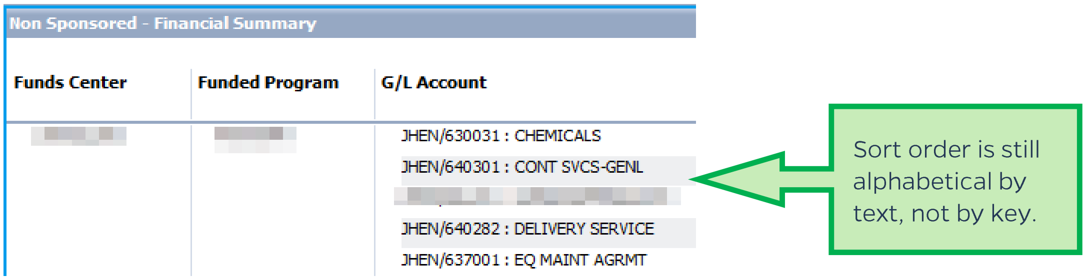


To adjust the display of G/L Account data, including sort order, do the following:

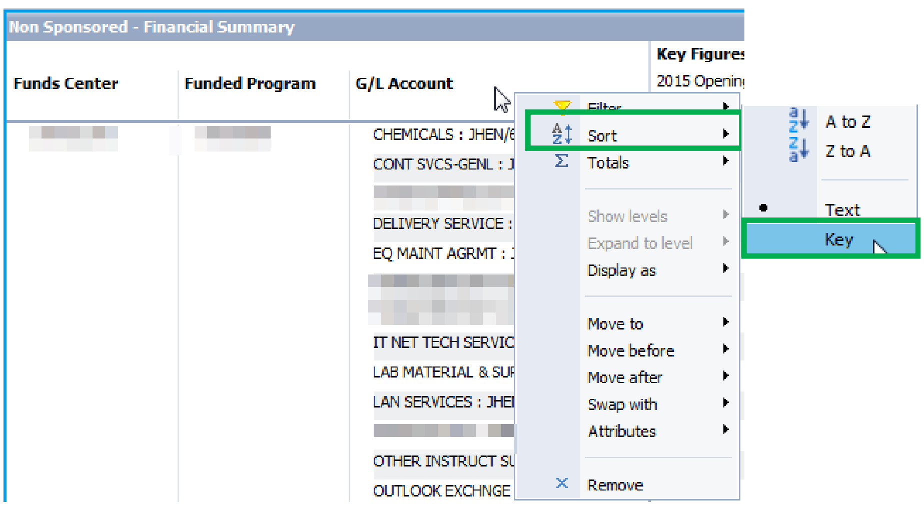
1. Right-click the G/L Account column header. This will bring up a Context menu.
2. Hover over **Display as**.
3. From the **Display as** drop-down menu, select **Key : Text**.



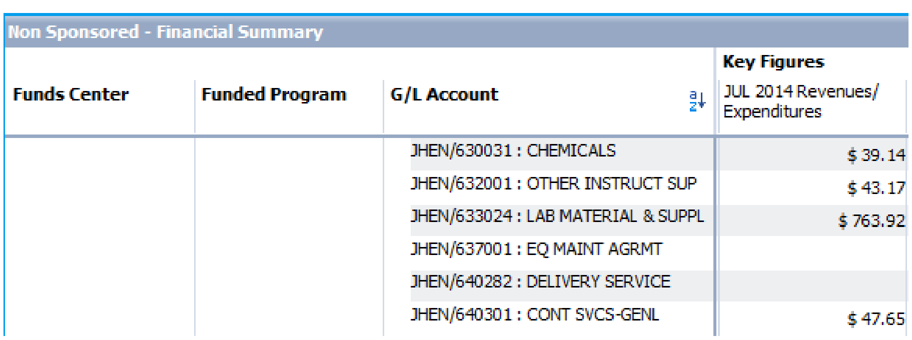
The G/L Account number is now sorted by key (#) followed by the text description.



1. To correct the Sort order, right-click on G/L Account and hover over Sort.
2. From the Sort drop-down menu, click Key.

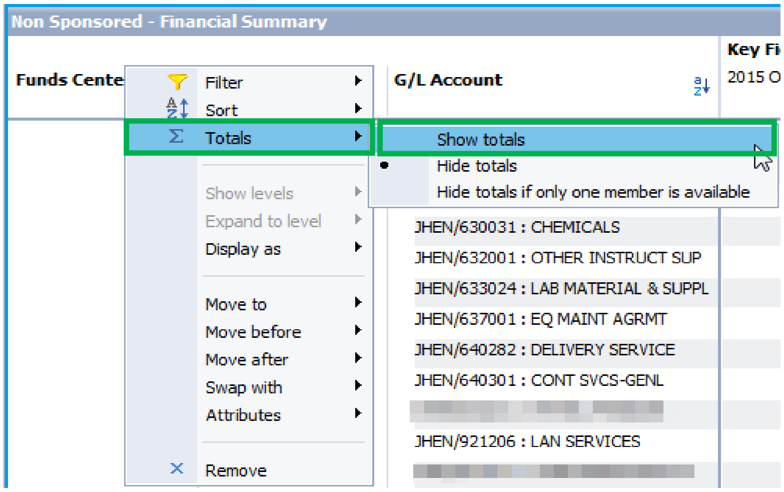


The data is now sorted by key (G/L Account) number.



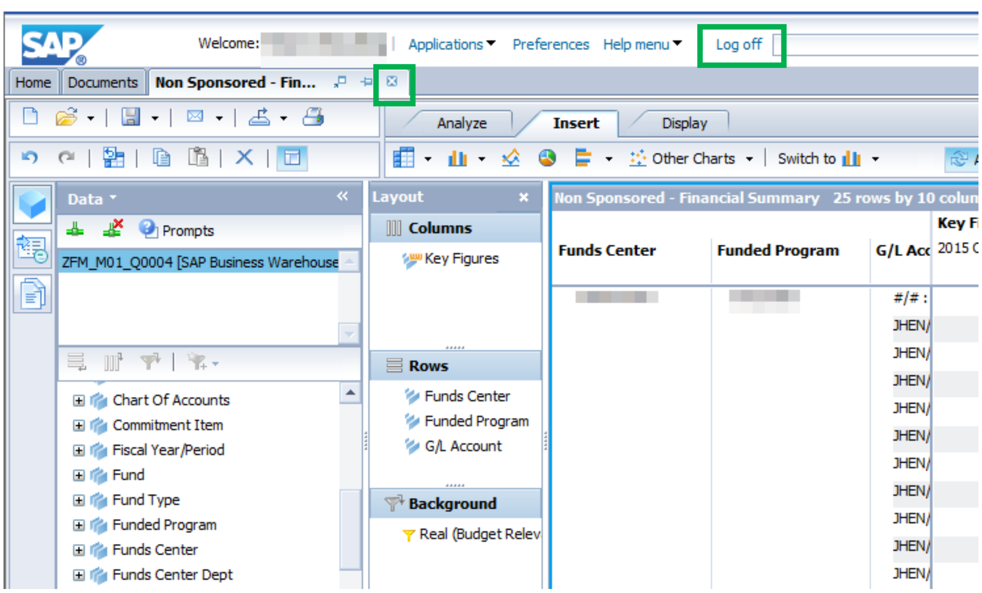
Adding grand totals

1. Right-click the Funds Center column heading. This will bring up a Context menu.
2. Select Totals.
3. From the Totals drop-down menu, select Show totals.



Exit the workspace and log off

Click the X on the workspace tab to close the workspace, and click the Log off link to exit Analysis.



You may want to save your report as a favorite or export it to excel.
Please refer to the following job aids:

- Saving a Favorite
- Exporting Data to Excel