

EP010 Contract Summary & Report Basics

Presented to Procurement & Facilities: October 30, 2014

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 - Why EP010 Contract Summary?
 - How Do I Get Access? Security Role and GRC CUPS
 - How to Find Procurement/Contract Reports
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 - Customize report layout by Resp. Employee and Purchasing Group
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Why EP010 Contract Summary?

How Do I Get Access? Security Roles and GRC-CUPS

How to Find Procurement/Contract Reports

GETTING STARTED

Why EP010 Contract Summary?

- EP010 Contract Summary primarily contains ***Contract Header*** data from ***SRM (Supplier Relationship Management)***.
- This report can be used to track the system agreements that have been approved by the District to issue purchase orders against.
- The report assists Procurement/Contract staff to track contract expiration dates, remaining balances, sponsoring department and contract status as well as the contract types.

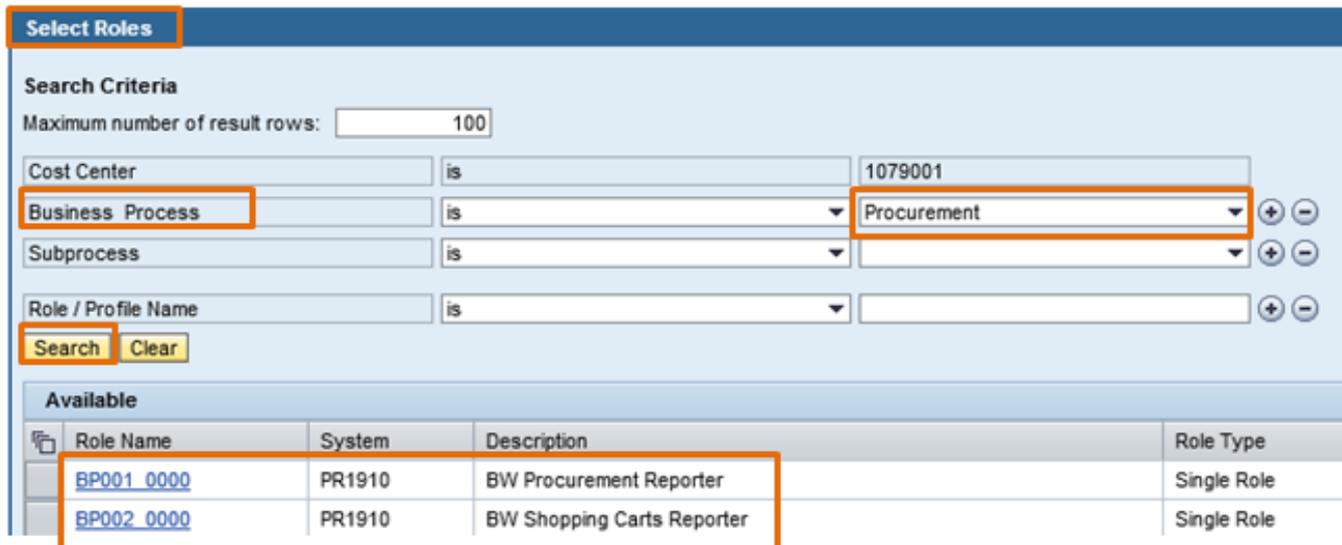
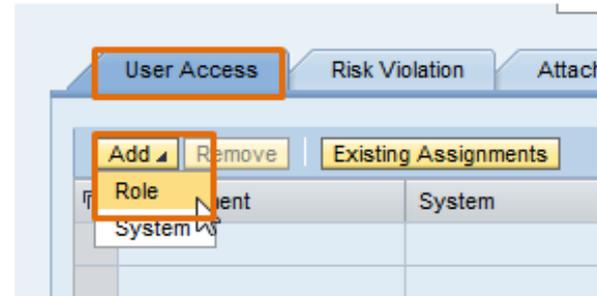
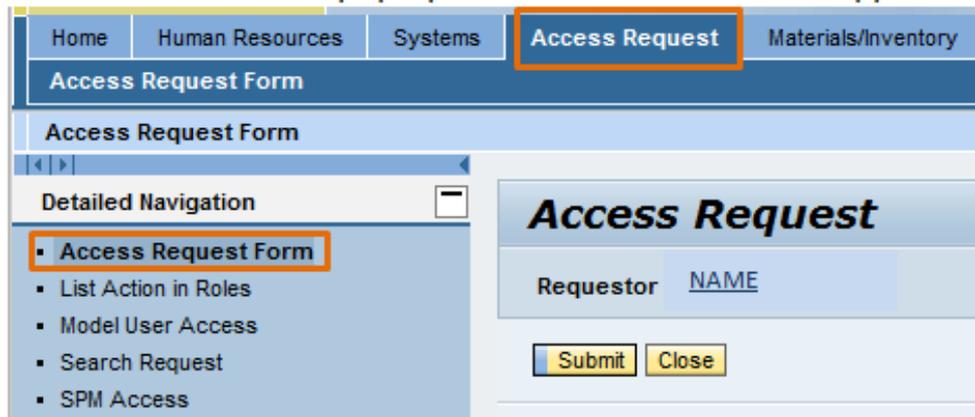
How Do I Get Access? Security Roles

- **BP001_0000 BW
Procurement
Reporter**

- This role is for Procurement and Facilities buying/contract staff

- **BP002_0000 BW
Shopping Carts
Reporter**

- This role is for Shopping Cart Requestors and Approvers



Request SAP Access via GRC-CUPS

- Log onto SAP, click on **Access Request** tab, and click on **Access Request Form**.
- Go to **User Access** tab, click on **Add**, and select **Role**. **Select Roles** pop-up opens.
- From **Business Process** drop-down, select **Procurement**, click on **Search** button. Procurement roles will appear.
- Select appropriate role and click on **OK** button.
- **Select Roles** pop-up closes and selected role appears under **User Access** tab. Click on **Submit** button.

The screenshot shows a web application interface with a navigation menu and a list of reports. Three callout boxes provide instructions:

- 1) Click on *Reports* tab**: Points to the 'Reports' tab in the navigation menu.
- 2) Click on *Procurement/Contracts* sub-tab**: Points to the 'Procurement/Contracts' sub-tab under the 'Reports' tab.
- 3) Click on *EP010 Contract Summary***: Points to the 'EP010 Contract Summary' item in the list of reports.

The interface includes a header 'Welcome BP001 - BW - Procurement Reporter', a navigation menu with 'Home', 'Reports', and 'Procurement/Contracts' tabs, and a list of reports including 'BE007 Price Comparison Over Multiple Bid Invitations', 'BE008 Bidder Analysis of a Bid Invitation', 'BE009 Bidder Analysis by Product Category', 'EP001 Purchase Values per Order', 'EP002 Procurement Value Analysis', 'EP003 Supplier Information', 'EP004 Key Performance Indicators', 'EP005 ABC Supplier', 'EP006 Purchase Order Document Analysis', 'EP007 Workload per Purchasing Group', 'EP008 Pareto Analysis According to Purchase Order Volume (Chart)', 'EP009 Pareto Analysis According to PO Volume per Category', 'EP010 Contract Summary', and 'EP011 Contract Detail Report'.

How to Find Reports

Log onto <https://apps.lausd.net>. Click on *Reports* tab. Click on *Procurement/Contracts* sub-tab.



How Does Data Get Into Reports?

Where Is Data Coming From?

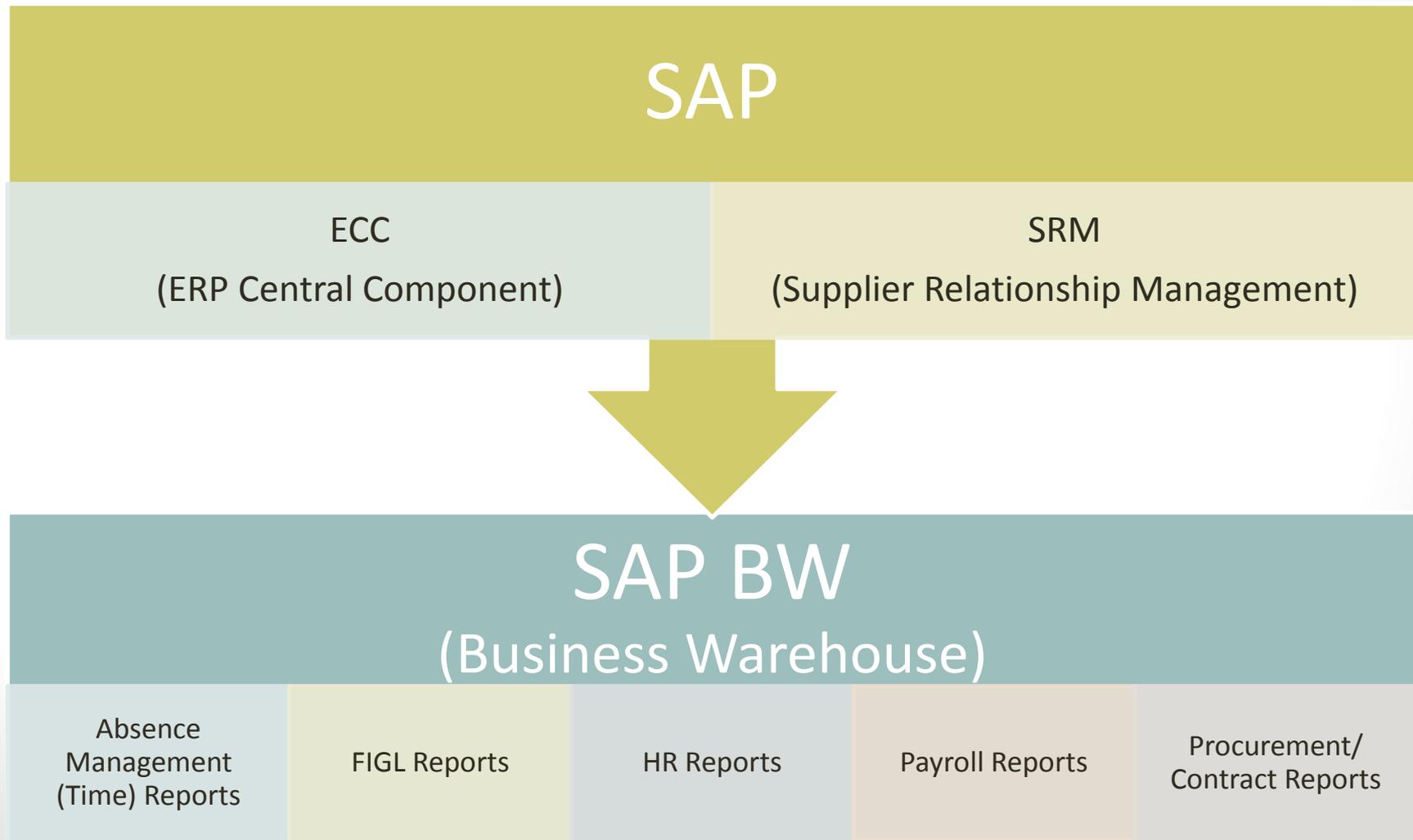
New Fields and Definitions

Using Processing Status With Associated Status

MAKING SENSE OF IT ALL

How Does Data Get Into Reports?

- BW (Business Warehouse) loads data via a scheduled nightly cycle
- Data in BW reports is view only



Where Is EP010 Contract Summary Data Coming From?

SRM

- Data in **EP010 Contract Summary** is primarily from **SRM, Contract Header**

ECC

- Exception: **Purchasing Group** is from ECC because this is where the Master Data is stored and maintained

Display Contract

Display Purchasing Contract 4400000234

Contract Number 4400000234 (Change Version) Smart Number ATHELETIC RENOVATIONS Contract Type Purchasing Contract Status Awaiting Approval Suppl

Close Show my Tasks Release Copy Refresh Print Preview Export

Overview

Header

Items

Notes and Attachments

Conditions

Authorization

Approval

Tracking

Basic Data Condition Exchange Rate Thresholds Notes and Attachments Output Payment Account Assignment Document Totals Synopsis User-Specified Stat

▼ Basic

Identification

New Serial Part for Smart Number

Contract Number: 4400000234

Contract Name: ATHELETIC RENOVATIONS

Contract Type: Purchasing Contract

Currency, Values and Pricing

Currency: * USD

Display Currency/ Exchange Rate Date:

Target Value: 374,449.31 USD

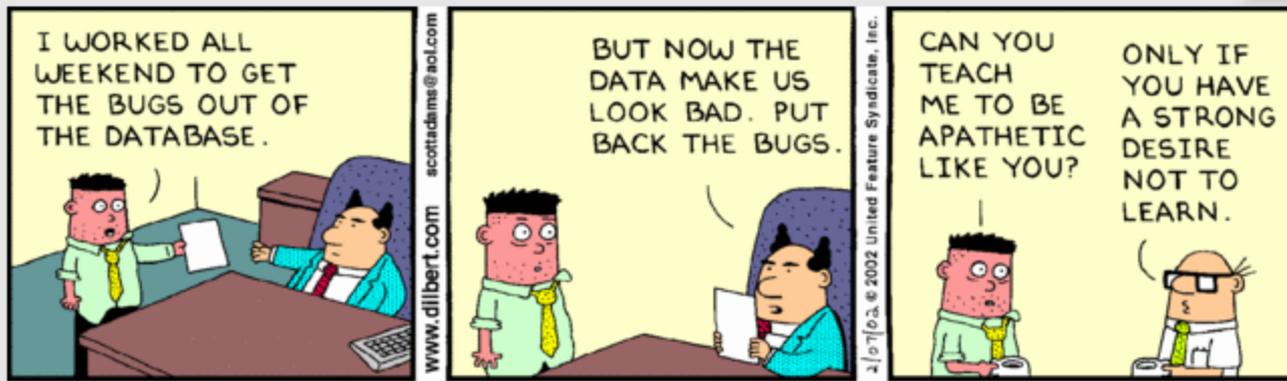
Alert Release Value: 60 %

New Fields and Definitions

Field Name (used in report)	Description	Examples
Assoc. Status	Supplemental status to Processing Status is an additional status that provides further information on what is happening with the contract prior to Release or after it has been Released.	Awaiting Approval, In Renewal, Locked
Changed On	The Changed On date is the last action date on that particular contract	mm/dd/yyyy
Distr. to Catalog	Identifies if the contract was sent to the MDM Catalog module	Yes (X), No (#)
Location 1	Can have up to 4 locations.	102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 2	Can have up to 4 locations.	102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 3	Can have up to 4 locations.	102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 4	Can have up to 4 locations.	102 LAUSD, 103 Stores Distribution, 104 Foods Distribution

Using Processing Status with Associated Status

Processing Status	Associated Status	Where Does This Occur in Contract Release Process?	Comments
Released	Not Assigned	Contract has been released	Contract is Released. This group also includes expired contracts.
Completed	Locked	After Contract has been released	Document is closed. No further actions can take place on the contract.
Held	Not Assigned	Prior to Contract being released	Started working on the Contract and is saved (Held) for more information or work.
Document Completed	Awaiting approval	Prior to Contract being Released	Contract is 'Awaiting Approval'.
Document Completed	Release Rejected	Prior to Contract being Released	Contract was not approved.
Deleted	Awaiting approval	Prior to Contract being released	Contract is deleted while in approval. Approver could have rejected and initiator deleted.
Deleted	Not Assigned	Prior to Contract being released	Started working on the Contract but later Deleted.



Variable Entry

Analysis Area

BW REPORT BASICS

The Basics

- Selection button
- Context Menu
- Open/Collapse Tray
- Expand/Collapse Folder
- Sort (Ascending/Descending)
- Drop Down Menu
- Filter button
- Select All
- Include/Exclude
- Settings
- Change Order
- Add (Add All)/Remove (Remove All)
- Apply button
- OK button



All BW Reports Have...

- A **Variable Entry** Page
 - Enter filter criteria prior to running report
 - **Selection Criteria** can be manually typed in or entered by clicking on selection button 
 - **Variants** can save filter criteria for future use
- An **Analysis Area**
 - Defaulted to layout pre-defined by business owner
 - Can be changed by dragging and dropping fields, filtering, sorting etc.
 - Use **Context Menu** to customize
 - Save customized report to **Portal Favorites**

Variable Entry

Available Variants: Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable ^{△▽}	Current Selection	Description
* Contract No. (Selection Required)	<input type="checkbox"/>	
Ref. Contract No. (Selection Optional)	<input type="checkbox"/>	
Validity From (Selection Optional)	<input type="checkbox"/>	
Validity To (Selection Optional)	<input type="checkbox"/>	
Changed On (Selection Optional)	<input type="checkbox"/>	
Created On (Selection Optional)	<input type="checkbox"/>	
Contract Category (Selection Optional)	<input type="checkbox"/>	
Purchasing Group (Selection Optional)	<input type="checkbox"/>	
Supplier (Selection Optional)	<input type="checkbox"/>	
Sponsoring Dept. (Selection Optional)	<input type="checkbox"/>	
Processing Status (Selection Optional)	<input type="checkbox"/>	
Option Prds (Selection Optional)	<input type="checkbox"/>	

OK Check



EP010 Contract Summary

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New Analysis Open Save As... Display As: Table Info Send Print Version Export to Microsoft Excel Notes

- ▼ Columns
- Key Figures
- ▼ Rows
- Supplier
- Contract No.
- Ref. Contract No.
- Purchasing Group (ECC)
- ▼ Free characteristics
- # of Option Prds.
- % SBE
- Assoc. Status
- Board Approval
- Changed On
- Contract Category
- Contract Name
- Contract Type
- Created On
- Dept. Contact
- Distr. to Catalog
- Exempt Comp. Approval

Supplier [△]	Contract No. [△]	Ref. Contract No. [△]	Purchasing Group (ECC) [△]		Days to Expire ^{△▽}	Authorized Amount ^{△▽}	Release Amount ^{△▽}	Balance Remaining ^{△▽}	% Released Amount ^{△▽}	% Balance Remaining ^{△▽}	
						\$	\$	\$			
1000000007	PALLER-ROBERTS	4400001134	1120028	138	Sook Shim	191	300,000.00	61,604.00	238,396.00	20.53	79.47
1000000009	ECOLOGY CONTROL	4400000001	1000212A	156	Lane Morikami	53	1,287,500.00	829,636.17	457,863.83	64.44	35.56
		4400000002	1000212B	156	Lane Morikami	53	1,310,000.00	845,163.00	464,837.00	64.52	35.48
		4400000003	1000212C	156	Lane Morikami	53	225,000.00	149,877.00	75,123.00	66.61	33.39
		4400000004	1000212D	156	Lane Morikami	53	41,667.00	0.00	41,667.00	0.00	100.00
		4400000005	1000212E	156	Lane Morikami	53	66,667.00	0.00	66,667.00	0.00	100.00
		4400000079	0400461A	001	Caputo Staging	-466	2,500,000.00	2,185,361.00	314,639.00	87.41	12.59
1000000012	UNIVERSITY OF THE	4400002857	#	152	Brent Paul	-113	40,000.00	40,000.00	0.00	100.00	0.00
1000000013	STRUMWASSER &	4400000605	1190120	168	Anthony Silo	71	2,200,000.00	2,156,931.00	43,069.00	98.04	1.96
1000000014	GINA AIREY	4400002989	#	159	Renato Santos	-113	30,000.00	30,000.00	0.00	100.00	0.00
1000000019	KAMRAN & CO, INC.	4400001318	1150101	174	Justin Santos	40	2,860,000.00	2,189,803.79	670,196.21	76.57	23.43
1000000023	WIDOM WEIN COHEN	4400001595	0820011	001	Caputo Staging	-113	7,849,754.27	7,849,754.00	0.27	100.00	0.00
1000000025	TEAM PRIME TIME,	4400002807	#	171	Galen Van Renssela	983	5,000,000.00	0.00	5,000,000.00	0.00	100.00
1000000038	WAISMAN	4400000186	0610170	001	Caputo Staging	-466	1,147,016.68	1,118,500.00	28,516.68	97.51	2.49
1000000040	KI THOUGHTBRIDGE	4400002474	#	156	Lane Morikami	-144	63,100.00	63,100.00	0.00	100.00	0.00
1000000047	NESTOR & GAFFNEY	4400000033	0120083	001	Caputo Staging	-466	71,666.00	71,667.00	-1.00	100.00	0.00

Variable Entry: Search

- To search for a filter value, click on **Show view:** drop down menu, select **Search**.
- To search by either **Key** or **Text**, click on the drop down next to the field name.
- Type in your search criteria in the field located to the left of the selection button.
- Keep in mind, search is CASE SENSITIVE
- Using a * (wildcard) before and after search may help.

Select values for Supplier (Selection Optional) (ZBBPVENDSO)

More than 1000 values available; not all values are displayed

Show tool: Single values Show view: All

All

Maximum Records: 1000 Refresh

Select all

Vendor: Key ^{ns}	Vendor: Text ^{ns}
#	Not assigned
1000000007	PALLER-ROBERTS
1000000009	ECOLOGY CONTROL
1000000012	UNIVERSITY OF THE
1000000013	STRUMWASSER &
1000000015	JOHNSTONE SUPPLY
1000000019	KAMRAN & CO, INC.
1000000023	WIDOM WEIN COHEN
1000000025	TEAM PRIME TIME,
1000000038	WAISMAN
1000000040	KI THOUGHTBRIDGE
1000000047	NESTOR & GAFFNEY

Enter a value for Vendor:

OK Cancel

Select values for Supplier (Selection Optional) (ZBBPVENDSO)

Show tool: Single values Show view: Search

Search

Vendor: Text *APPLE* Search

Maximum Records: 1000

Select all

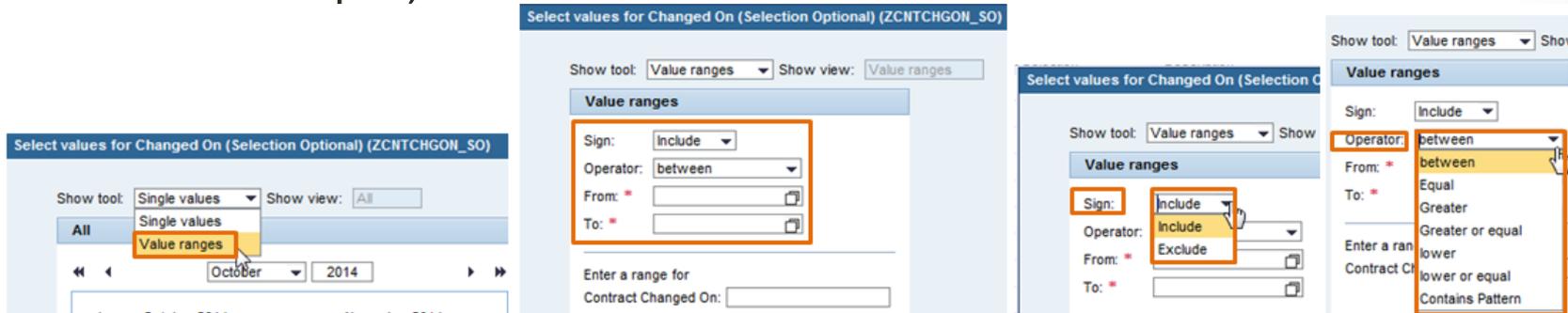
Vendor: Key ^{ns}	Vendor: Text ^{ns}
1000001789	APPLE COMPUTER, INC.
1000002409	APPLE COMPUTER, INC.

Enter a value for Vendor:

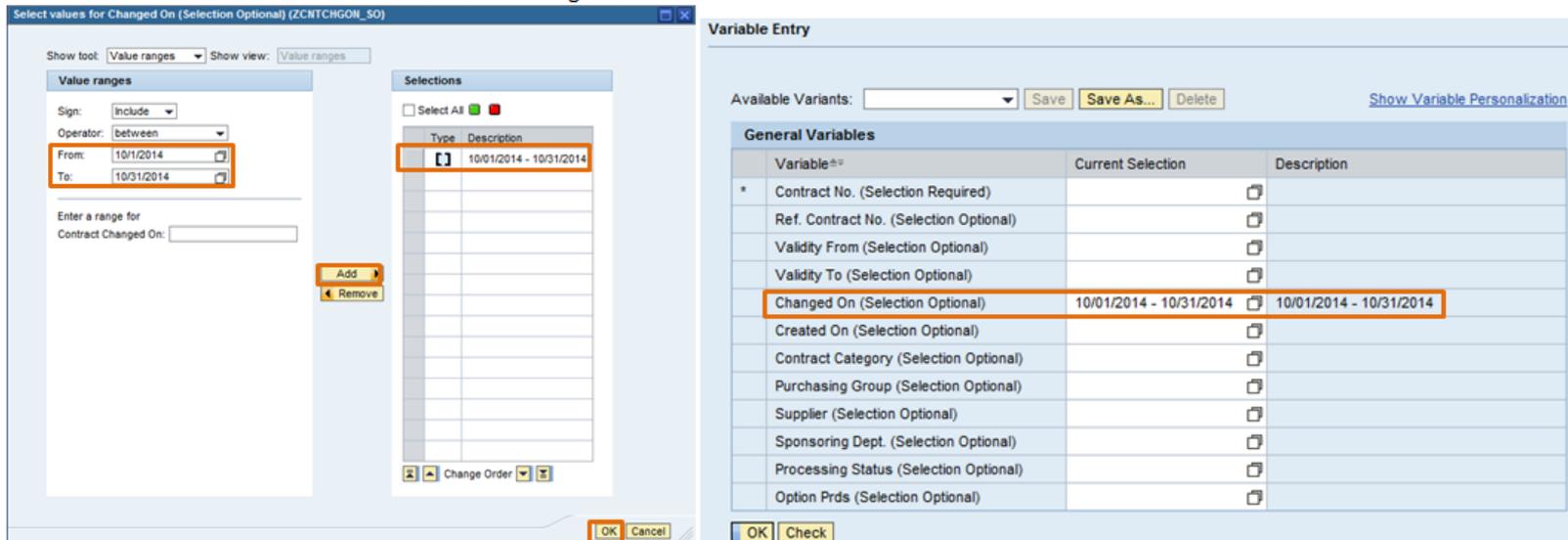
OK Cancel

Variable Entry: Value Range

- To enter a **Value range**, click on the **Show tool:** dropdown and select **Value ranges**.
- Value ranges** can be further customized to **Sign:** Include/Exclude and **Operator:** between, Equal, Greater, Greater or equal, lower, lower or equal, Contains Pattern



Enter **From:** and **To:** values. Click on **Add** button to move range to **Selections** screen. Click on **OK** button.



Variable Entry: Variant –continued–

- **Save Variant**
 - Click on **Save As** button
- **Save Variant** pop-up opens
 - Enter **Description**, click on **OK** button
- **Variant** can be reused by clicking on dropdown next to **Available Variants:**
- Clicking on **Delete** button will delete **Saved Variant**

Variable Entry

Available Variants: Save Save As... Delete Show Variants

General Variables

	Variable [≠]	Current Selection	Description
*	Contract No. (Selection Required)	0 - 9999999999	0 - 9999999999
	Ref. Contract No. (Selection Optional)		

Save Variant

Save As User Variant

Description:

OK Cancel

Variable Entry

Available Variants: Save Save As... Delete Show Variants

General Variable

	Variable [≠]	Current Selection	Description
*	Contract No. (Selection Required)	0 - 9999999999	0 - 9999999999
	Ref. Contract No. (Selection Optional)		

Analysis Area: Default Layout, Rows, Columns, Free Characteristics

- **Default Layout:** predefined by report owner (can be modified)
- **Columns:** data displays across/horizontal ↔
- **Rows:** data displays down/vertical ↓
- **Free Characteristics:** additional fields that can be added to report/filtered on



Last Data Update: 10/22/2014 02:43:57

EP010 Contract Summary

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New Analysis Open Save As...

Display As Table ▼

Info Send Print Version Export to Microsoft Excel Notes

Columns (data displays across/horizontal)

Rows (data displays down/vertical)						Days to Expire	Authorized Amount	Release Amount	Balance Remaining	% Released Amount	% Balance Remaining	
							\$	\$	\$			
▼ Columns						Sook Shim	190	300,000.00	61,604.00	238,396.00	20.53	79.47
• Key Figures						Lane Morikami	52	1,287,500.00	829,636.17	457,863.83	64.44	35.56
▼ Rows						Lane Morikami	52	1,310,000.00	845,163.00	464,837.00	64.52	35.48
• Supplier	1000000007	PALLER-ROBERTS	4400001134	1120028	138	Lane Morikami	52	225,000.00	149,877.00	75,123.00	66.61	33.39
• Contract No.	1000000009	ECOLOGY CONTROL	4400000001	1000212A	156	Lane Morikami	52	41,667.00	0.00	41,667.00	0.00	100.00
• Ref. Contract No.			4400000002	1000212B	156	Lane Morikami	52	66,667.00	0.00	66,667.00	0.00	100.00
• Purchasing Group (ECC)			4400000003	1000212C	156	Lane Morikami	52	2,500,000.00	2,185,361.00	314,639.00	87.41	12.59
▼ Free characteristics						Caputo Staging	-467	2,500,000.00	2,185,361.00	314,639.00	87.41	12.59
• # of Option Prds.			4400000004	1000212D	156	Lane Morikami	52	41,667.00	0.00	41,667.00	0.00	100.00
• % SBE			4400000005	1000212E	156	Lane Morikami	52	66,667.00	0.00	66,667.00	0.00	100.00
• Assoc. Status	00000012	UNIVERSITY OF THE	4400002657	#	152	Brent Paul	-114	40,000.00	40,000.00	0.00	100.00	0.00
• Board Approval	00000013	STRUMWASSER &	4400000605	1190120	168			0,000.00	2,156,931.00	43,069.00	98.04	1.96
• Changed On	00000014	GINA AIREY	4400002869	#	159			0,000.00	30,000.00	0.00	100.00	0.00
• Contract Category	00000019	KAMRAN & CO, INC.	4400001318	1150101	174			0,000.00	2,189,803.79	670,196.21	76.57	23.43
• Contract Name	00000023	WIDOM WEIN COHEN	4400001595	0820011	001	Caputo Staging	-114	7,849,754.27	7,849,754.00	0.27	100.00	0.00
• Contract Type	00000025	TEAM PRIME TIME,	4400002807	#	171	Galen Van Renssela	982	5,000,000.00	0.00	5,000,000.00	0.00	100.00
• Created On	00000038	WAISMAN	4400000186	0610170	001	Caputo Staging	-467	1,147,016.68	1,118,500.00	28,516.68	97.51	2.49
• Dept. Contact	00000040	KI THOUGHTBRIDGE	4400002474	#	156	Lane Morikami	-145	63,100.00	63,100.00	0.00	100.00	0.00
• Distr. to Catalog	00000047	NESTOR & GAFFNEY	4400000033	0120083	001	Caputo Staging	-467	71,666.00	71,667.00	-1.00	100.00	0.00
• Exempt Comp. Approv	00000048	C P O HALLORAN	4400001284	1380013	001	Caputo Staging	190	75,000.00	0.00	75,000.00	0.00	100.00
• Exempt Comp.Type	00000070	EXCEL DOOR & GATE	4400002522	1480012	105	Julie Gravel	39	15,000.00	0.00	15,000.00	0.00	100.00
• Insurance Approval	00000074	HAMLET PAPER CO.	4400001430	1350023	156	Lane Morikami	343	479,173.97	406,089.00	73,084.97	84.75	15.25
• Location 1												

Free Characteristics

Default Layout

Analysis Area: Drag and Drop

Add/move field: place cursor on field, left click and hold (to grab the desired field), drag from Free Characteristics into Analysis Area; line indicates field placement

Columns	
• Key Figures	
Rows	
• CommitItem	
• Program	
• Free characteristics	
• FiscalYear	
• FuncArea	
• Fund	
• Funded Program	
• FundsCenter	
• Grant	
• Posting period	
CommitItem Δ	Program Δ
430001 General Supplies	10641 Beyond the
	11476 Civic Cente
	12014 Mandate Cr
	13027 General Fu
	13938 SDEP-Dona
	13986 Sch Determ
	17120 Cafe Suppl
	7A960 GSU-Dev &
	7S046 CE-NCLB T
	7S536 CE-Eco Imp

Remove field: place cursor on field heading, left click and hold (to grab the desired field), drag out of report until you see X; X means remove

CommitItem Δ	Grant	Program Δ
430001 General Supplies	1100000	7S046 CE-NCLB T1 Schools
	110002	7S536 CE-Eco Impact Aid/Dis Bil Dir
	200764	7A960 GSU-Dev & Valid of a Behavioral

Drag and Drop

Swap fields: place cursor on field, left click and hold (to grab the desired field), drag over field to be replaced (blue highlight on field to be replaced)

CommitItem Δ	Program Δ	Fund Δ
430001 General Supplies	10641 Beyond the Bell-Credit Recovery-Summer S	010-0000 GF-Unrest
	11476 Civic Center Permit Program	010-0000 GF-Unrest

Remove Result

Row/Column: place cursor on results row, left click and hold (to grab the desired field), drag field until you see X; X means remove

FundsCenter Δ	CommitItem Δ
1043984	110077
	310117
	330137
	340117
	350117
	360117
	370117
	430009
	Result
1043991	430009

Analysis Area: Sort

- BW reports automatically sort in the order of the fields displayed in the **Analysis Area**.
- Clicking on the up or down arrow next to a field will sort the field in ascending or descending order.

Supplier 	Contract No. 	Ref. Contract No. 	Purchasing Group (ECC) 
1000000007	PALLER-ROBERTS	4400001134	1120028
1000000009	ECOLOGY CONTROL	4400000079	0400461A
		4400000005	1000212E
		4400000004	1000212D
		4400000003	1000212C
		4400000002	1000212B
		4400000001	1000212A
1000000012	UNIVERSITY OF THE	4400002657	#

Purchasing Group (ECC) 	Contract No. 	Supplier 
173	4400003313	#
	4400003314	#
174	4400001316	1000000770
	4400001318	1000000019
	4400003210	1000001938
175	4400002864	#
	4400002917	1000004154
	4400003214	#
176	4400003040	#
	4400003268	#
	4400003292	#
177	4400001098	1000002554
	4400001117	1000001364
	4400001154	1000004514
	4400001255	1000001901
	4400001317	1000001236
	4400001364	1000004166
188	4400001405	1000005876
	4400003013	#
	4400003185	1000000347

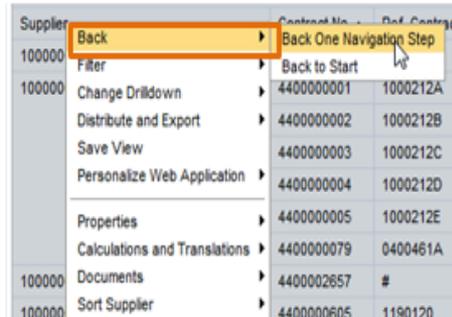
Analysis Area: Context Menu

- The **Context Menu** provides users with additional report options.
- Place cursor on a field and right click.
- The **Context Menu** has 5 primary features: **Back**, **Filter**, **Change Drilldown**, **Properties**, and **Sort**.

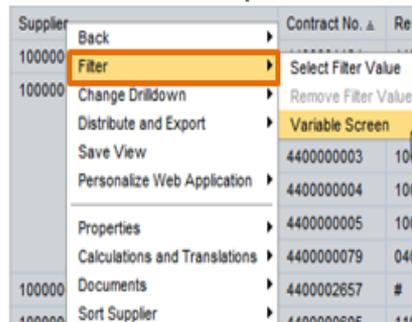
Contract No.	F
4400000003	1
4400000004	1
4400000005	1
4400000079	0
4400002657	#
4400000605	1

Context Menu: Back, Filter, Change Drilldown

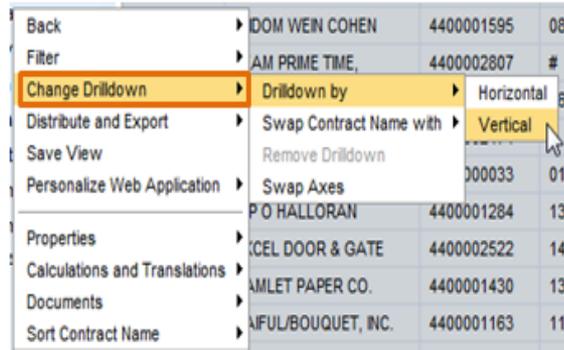
Back can be used to go **Back One Navigation Step** or **Back to Start**. **Back One Navigation Step** removes the last “action”. **Back to Start** returns the report to the original, default layout.



Filter allows the user to further filter data. **Filter** has 3 options: **Select Filter Value**, **Remove Filter Value**, and **Variable Screen**. **Select Filter Value** adds another filter. **Remove Filter Value** removes all filter values. **Variable Screen** re-opens the **Variable Entry** page for changing variable filter criteria.

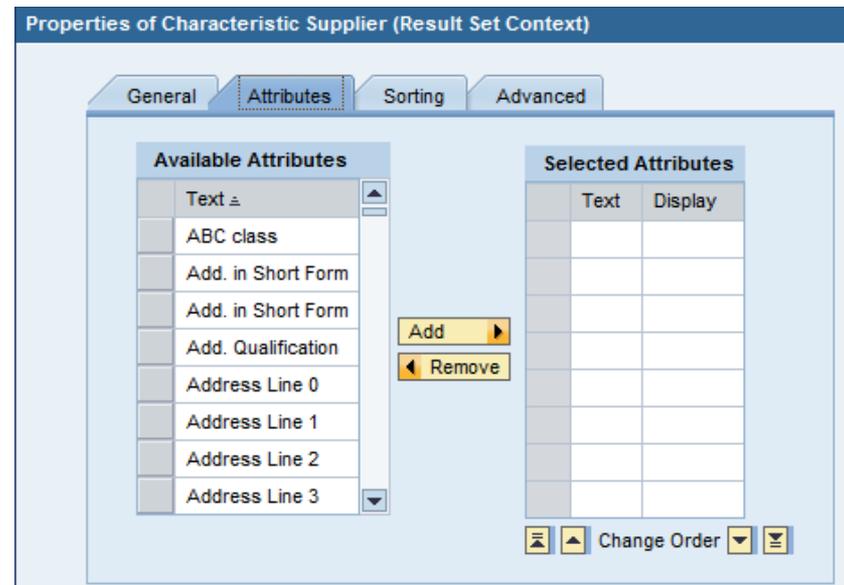


Change Drilldown offers an alternative to **Drag and Drop**. Choose **Drilldown by Horizontal** (Columns) or **Vertical** (Rows) to add a field from **Free Characteristics** to the **Analysis Area**. **Swap** can be used to swap one field with another. Use **Remove Drilldown** to remove a field from the **Analysis Area**.



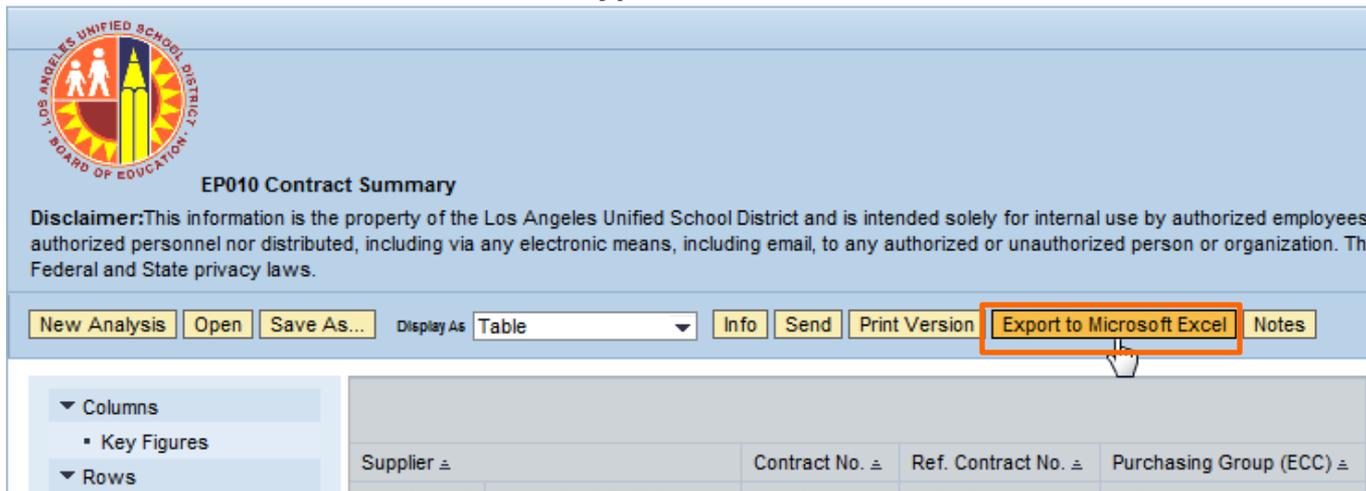
Context Menu: Properties

- **Properties** is used to change the related field's display.
- From the **General** tab, users can change the field **Display** to **Key**, **Text**, or **Key and Text** as well as change **Display Results** to **Never** or **Always**.
- **Attributes** (if available for the field) allows users to add additional information about the field. Keep in mind, however, that **Attributes** are always as of TODAY'S DATE (even in a historical report).

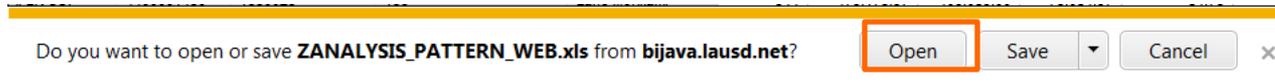


Analysis Area: Export to Excel

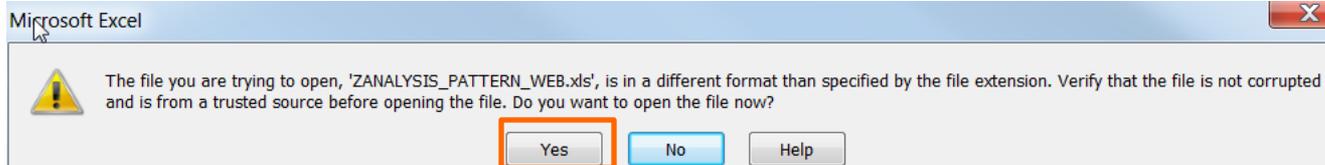
- Report results can be exported to Excel
- Click on **Export to Microsoft Excel** button
- A prompt at the bottom of your screen will display. Select **Open**.
- Remember to **Save As** and **Save as type**: Excel Workbook



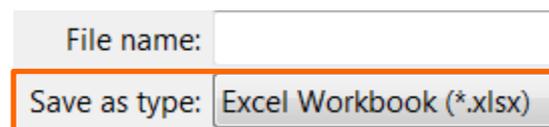
The screenshot shows the 'EP010 Contract Summary' page. At the top left is the Los Angeles Unified School District logo. Below it is a disclaimer: 'Disclaimer: This information is the property of the Los Angeles Unified School District and is intended solely for internal use by authorized employees authorized personnel nor distributed, including via any electronic means, including email, to any authorized or unauthorized person or organization. This Federal and State privacy laws.' A toolbar contains buttons for 'New Analysis', 'Open', 'Save As...', 'Display As' (set to 'Table'), 'Info', 'Send', 'Print Version', 'Export to Microsoft Excel' (highlighted with an orange box), and 'Notes'. Below the toolbar is a table with columns: 'Supplier', 'Contract No.', 'Ref. Contract No.', and 'Purchasing Group (ECC)'. A mouse cursor is pointing at the 'Export to Microsoft Excel' button.



The dialog box asks: 'Do you want to open or save ZANALYSIS_PATTERN_WEB.xls from bijava.lausd.net?'. It has buttons for 'Open' (highlighted with an orange box), 'Save', 'Cancel', and a close button (X).



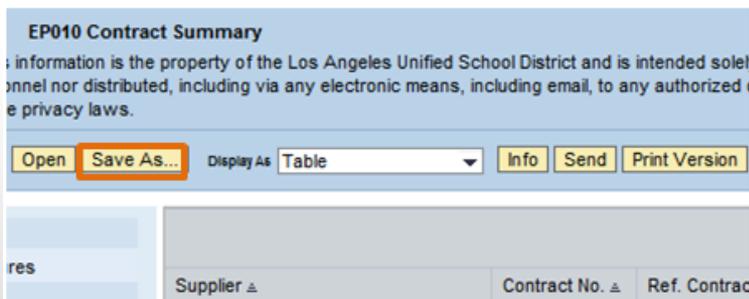
The Microsoft Excel dialog box contains a warning icon and the text: 'The file you are trying to open, 'ZANALYSIS_PATTERN_WEB.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?'. It has buttons for 'Yes' (highlighted with an orange box), 'No', and 'Help'.



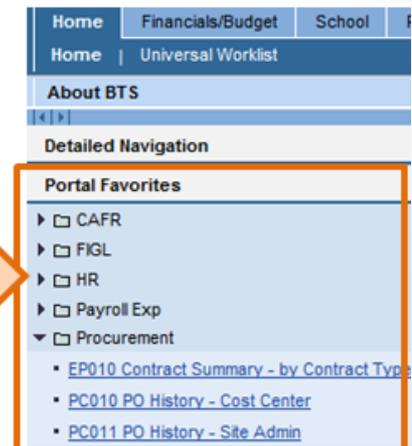
The 'Save As' dialog box shows 'File name:' followed by an empty text field. Below it, the 'Save as type:' dropdown menu is set to 'Excel Workbook (*.xlsx)' (highlighted with an orange box).

Analysis Area: Save As & Portal Favorites

- Saving a report using the **Save As** button saves the customized report in **Portal Favorites**
- Reports saved to **Portal Favorites** can be stored and organized in custom folders for easy access
- **Save As** allows you to save report layouts to **Portal Favorites**
- Reports saved to **Portal Favorites** do not “break” like Bookmark links when the underlying report is changed



Save As allows you to save report layouts to **Portal Favorites**



Analysis Area: Save As

- Clicking on **Save As...** button opens **Save as** pop-up. Enter **Description** and click on **OK** button.

EP010 Contract Summary

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New Analysis | Open | **Save As** | Display As: Table | Info

▼ Columns

- Key Figures

▼ Rows

- Processing Status
- Assoc. Status

▼ Free characteristics

- # of Option Prds.
- % SBE
- Board Approval

Completed	Deleted	Document Completed	Held	Released	soc. Status
					Locked
					Awaiting Approval
					Not assigned
					Awaiting Approval
					Release Rejected
					Not assigned
					Not assigned

Save as

System: @PORT... | Type: KMBookmark

Save Variable Values

Favorites | BEx Portfolio

- Description
- Absence Analysis
- Funds Management
- General Ledger
- HR
- Payroll Expenditure
- Procurement
- HR105 Position History (SAP) - Current Vacancies
- PO with Contract

Description: Type Description Here

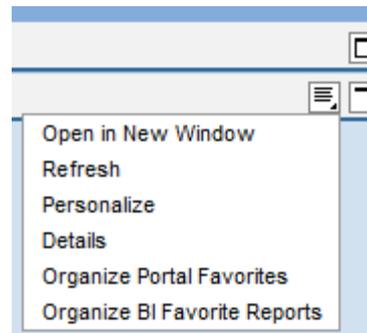
OK Cancel

Portal Favorites

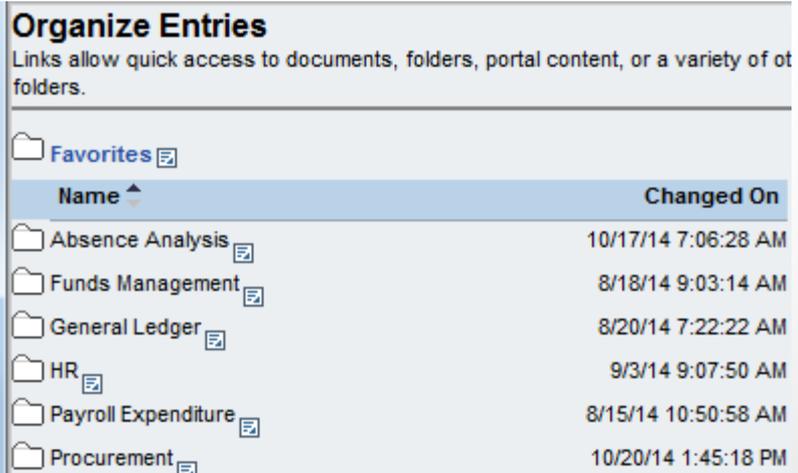
- Saved reports can be found on the SAP portal page, **Portal Favorites**
- Clicking on **Context Menu**  opens with options to organize
- **Organize BI Favorite Reports** to create folders and manage saved reports



The screenshot shows the SAP portal navigation menu. At the top, there are tabs for Home, Human Resources, Systems, Access Request, and Materials/Inve. Below these are links for Accounts Payable, Accts Recv / Cash Mgmt, Administrative, and Asset Man. The main menu is divided into sections: Reports, Detailed Navigation, and Portal Favorites. The Portal Favorites section is expanded, showing a list of folders: Absence Analysis, Funds Management, General Ledger, HR, Payroll Expenditure, and Procurement.



The screenshot shows a context menu for the Portal Favorites section. The menu items are: Open in New Window, Refresh, Personalize, Details, Organize Portal Favorites, and Organize BI Favorite Reports.



The screenshot shows the Organize Entries dialog. It has a title bar "Organize Entries" and a subtitle "Links allow quick access to documents, folders, portal content, or a variety of folders." Below the subtitle is a list of folders under the heading "Favorites". The list has two columns: "Name" and "Changed On".

Name	Changed On
Absence Analysis	10/17/14 7:06:28 AM
Funds Management	8/18/14 9:03:14 AM
General Ledger	8/20/14 7:22:22 AM
HR	9/3/14 9:07:50 AM
Payroll Expenditure	8/15/14 10:50:58 AM
Procurement	10/20/14 1:45:18 PM



Create a *Variant* for *Contract No.*

Customize default layout by *Resp. Employee* and *Purchasing Group*

Use *Save As* to save report layout to *Portal Favorites*

PUTTING IT ALL TOGETHER

Scenario

- Create a ***Variant*** for all ***Contract No.***
- Customize EP010 to display your ***Contracts*** with ***Purchasing Group***
- Save customized report to ***Portal Favorites***

Create a *Variant*

1. Click on selection button
2. Show tool: Value ranges
3. Enter **From:** 0 & **To:** 99999999
4. Click on **Add** button, click on **OK** button
5. Click on **Save As** button
6. Enter **Description:** Contract No. ALL
7. Click on **OK** button

Variable Entry

Available Variants: Save Save As... Delete

General Variables

Variable [≠]	Current Selection	Description
* Contract No. (Selection Required)	0 - 9999999999	0 - 9999999999

Save Variant

Save As User Variant

Description:

OK Cancel

Variable Entry

Available Variants: Save Save As... Delete

General Variables

Variable [≠]	Current Selection	Description
* Contract No. (Selection Required)	0 - 9999999999	0 - 9999999999

Select values for Contract No. (Selection Required) (ZCONTRNO_SELRL)

Show tool: Value ranges Show view: Value ranges

Value ranges

Sign: Include Operator: between From: 0 To: 9999999999

Enter a range for Contract ID:

Add Remove

Selections

Select All

Type	Description
[]	0 - 9999999999

Change Order

OK Cancel

Customize Default Layout

1. Drag out **Supplier** and **Ref. Contract No.**
2. Drag in **Responsible Employee**
3. Swap **Contract No.** with **Purchasing Group (ECC)**

EP010 Contract Summary

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Buttons: New Analysis, Open, Save As..., Display As: Table, Info

Columns:

- Key Figures
- Rows
 - Supplier
 - Contract No.
 - Ref. Contract No.
 - Purchasing Group (ECC)

Supplier	
1000000007	PALLER-ROBERTS
1000000009	ECOLOGY CONTROL

- Location 4
- Ltd. NTP
- Modification No.
- Option Prds.
- Option Prds. Remaining
- Processing Status
- Ref. Contract No.
- Resp. Employee
- RFx Advertise

4400000020	001
4400000021	001
4400000022	001
4400000023	001
4400000024	137
4400000025	001

Page 1 of 1

Resp. Employee	Purchasing Group (ECC)	Contract No.	
8186 Hernandez, Yolanda	011 CENTRAL OFFICES	4400002403	
	147 Iris Escamilla	4400002354	
	168 Anthony Silo		4400002748
			4400002753
			4400002926
		4400002927	
		4400002928	
173 Yolanda Hernandez		4400001917	
		4400001953	
		4400001954	

Using Save As ...Portal Favorites

1. Click on Save As... button
2. Enter Description, click on OK button



EP010 Contract Summary

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New Analysis Open Save As... Display As Table Info Send Print Versi

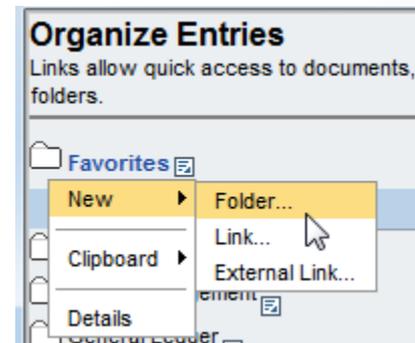
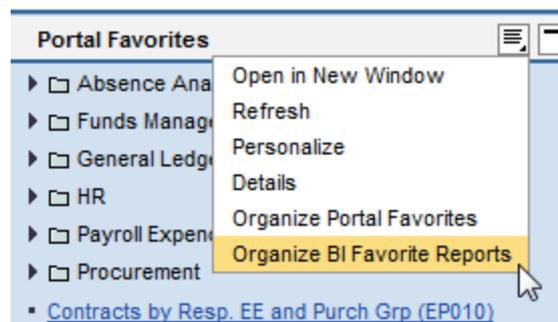
- Columns
 - Key Figures
- Rows

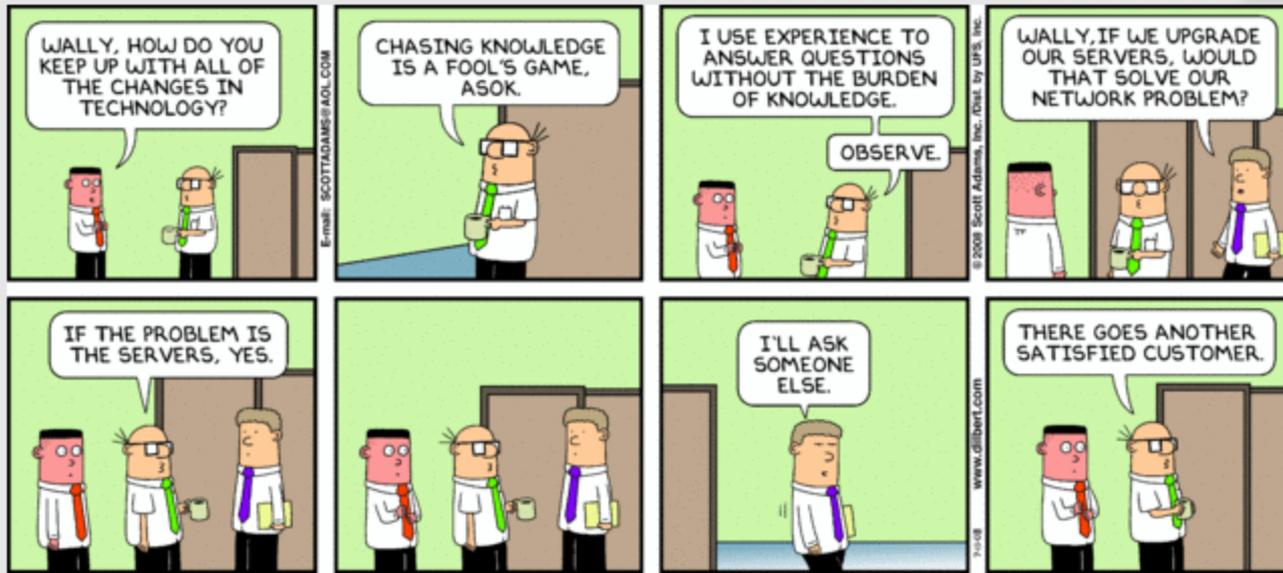
Resp. Employee Δ Purchasing Group (ECC) Δ Contr

A screenshot of a "Save as" dialog box. The title bar reads "Save as". The "System" field contains "@PORT..." and the "Type" field contains "KMBookmark". There is a checked checkbox for "Save Variable Values". Below this, there are two tabs: "Favorites" and "BEx Portfolio". The "Favorites" tab is active, showing a list of folders: "Absence Analysis", "Funds Management", "General Ledger", "HR", "Payroll Expenditure", and "Procurement". At the bottom of the dialog, the "Description" field contains the text "Contracts by Resp. EE and Purch Grp (EP010)". The "OK" and "Cancel" buttons are visible at the bottom right.

Saved Reports in Portal Favorites

1. Refresh portal page 
2. Saved report will show up under **Portal Favorites**
3. To manage and organize **Portal Favorite** report links, click on Context Menu 
4. Click on **Organize BI Favorite Reports**
5. To create new folder click on **Context Menu** next to **Favorites** → click on **New** → select **Folder**





BASE Training Center – Reports

OTHER RESOURCES

BASE Training Center - Reports

<http://www.lausd.net/ol/basetraining/reports.html>



Business Applications
Supporting Education

BASE TRAINING CENTER



HOME	TRAINING MATERIAL	BPP LIBRARY	JOB AIDS	REPORTS	SAP SUPPORT	**UPDATES**
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Reports Library

The Reports Library contains quick reference guides for various SAP reports.

BW Reports

Reference Document	Role	pdf
Reporting: Site Administrator Security Roles	Site Administrator	
Reporting: Getting Started 1-2-3	Site Administrator	
Reporting: Helpful Hints	Site Administrator	
Customizing HR105 Position History (SAP) For Vacancy Reporting by Cost Center	Site Administrator	
Guide to EP010 Contract Summary	Site Administrator	
How to Create a Report Variant	Site Administrator	
How to Create a Report Variant for Norm Run Date 2014-15	Site Administrator	
How to Create a Report Bookmark	Site Administrator	
How to Find and Use Employee Emergency Contact Reports	Site Administrator	
How to Use "Display As" Feature	Site Administrator	
How to Use Drag and Drop in Reports	Site Administrator	
How to Use Portal Favorites and Save As Features	Site Administrator	
How to Use Variable Personalization	Site Administrator	
Understanding Position Vacancy in BW Reports	Site Administrator	
Using Fund Center or Cost Center Hierarchies	Site Administrator	
Variable Entry Page - Loading Lists as Selection Criteria	Site Administrator	

Questions?

