EBCMP BUDGETS

HOW TO: CREATE A REPORT

Generating a report involves the following activities:

- Selecting the report and setting report filters
- Configuring the report results
- Drilling to transaction detail data
- Printing and/or downloading report results

ADD / REMOVE SUBTOTAL

The first two columns in every report are formatted to display subtotals. The third column is formatted without a subtotal. To add a subtotal to any column, use the Show Subtotal option in the Columns shortcut menu.

1 Place the cursor at the top of the column where you want to add a subtotal.

   The Show Subtotal option is available only from columns formatted as column selectors, as indicated by the yellow column heading.

2 Right click on the yellow column heading to access the Columns shortcut menu.

3- Choose Show Subtotal > After Values.

4- To remove a subtotal, choose Show Subtotal > None.

REPORT VIEWS

Report view selectors present report results in different ways with different formats to display data for a specific purpose. Each report has its own set of views to help organize report data.

Use the Filters Report View to see all search criteria associated with your report (including dashboard defaults). The report filter criteria also displays at the bottom of the report results area.

STEP THREE: DRILL THROUGH REPORT DATA

When you place your cursor over and item and it appears as a hyperlink, you are able to drill on that item. Drilling on a hyperlinked numeric value will take you to the details of the selected amount.

Drilldowns

Export to Excel

1. Generate a report. Below the report area, click the Export link.
2. Choose Excel 2007+
3. Click Save > Save as.
4. Name your Excel file and save it to a local drive.

Export Data

1. Generate a report. Below the report area, click the Export link. Choose Data.
2. Choose CSV Format, Tab delimited Format, or XML Format.

   Note: XML is used to transport data into a format that can be exported to the web.
3. Click Save. Choose Save as.
4. Name your data file and save it to a local drive.
5. Click on a breadcrumb or the Return link to return to previous screens from a drill down report.

ADVANCED FILTERS

Many dashboard pages contain an Advanced Filters section with a wider range of report filters. The Advanced Filters section can be expanded or collapsed by clicking the down arrow icon.

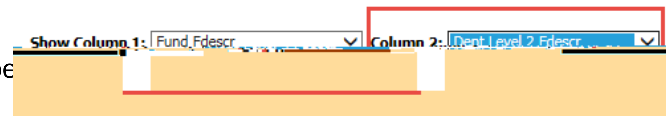
Advanced Filters include chartfield trees and tree levels for Department, Fund, Account, and Project; chartfield attributes and SCO attributes. All values entered in the Advanced Filters section are stored in any associated Saved Customization whether the Advanced Filters section is open or closed.

Working with Trees

The data warehouse supports tree reporting for the Department, Account, Fund, and Project chartfields. All trees that have been configured to be available in the Data Warehouse will appear in the tree filter for the corresponding chartfield type. At this time we are only using Department Trees.

Report filters based trees and chartfield attributes are designed as "cascading filters". Once you select a tree or chartfield attribute, the subsequent levels will be filtered.

If you want to use tree levels in your column selectors, you must pick tree name in the Report Filters or Advanced Filters section.



All of the chartfield trees and tree levels are located in the Advanced Filters section of all pages except for My Budget. Only the Department Tree is available in the Report Filters section of MMB.

STEP FIVE : SAVE REPORT CUSTOMIZATIONS

Using the Page Options / Save Customization feature, you can store report criteria and formats. You can save as many different combinations of these items as you want for an individual report. You can also choose a saved selection as the default for a page. Saved selections can be renamed or deleted, as needed.

When you save a customization, all of the following components are stored:

- Report filters, basic and advanced
- Column selectors
- Report view

Create a Saved Customization

1. Generate a report that has the report filter values that you want to store.
2. Select the Report View you want to save.
3. Use the Columns Selectors to choose the columns to wish to include in your report results. Click Go to execute your selection.
4. From the Page Options menu, choose Save Current Customization.

5 Click OK.

Apply Saved Customization

1 Click Page Options > Apply Saved Customization > Your Selection Name

- Saved selections are specific to an individual dashboard PAGE.
- There is no limit to the number of saved selections per .

5 Click