



Activity Summary

Create a multi-year summary report and refine your report filters to create a different report.

Objectives Covered

- Navigate to a report using different dashboards
- Save customized reports and default settings for dashboards
- Run reports using the 5 step process
- Select report filters based on your Golden 6
- Apply different report views
- Enhance reports by adding subtotals, excluding columns

PART I: Multi-Year Summary

Create a multi-year summary report.

1. Select the Dashboard: Financial Reporting
2. Select the Report: Financial Summary by Year
3. Select the following Report filters
 - Business Unit – BKCMP
 - Fiscal Year – Between 2014 and 2016
 - Period from – 1 to 12
 - Account type – 50 and 60
 - Budget Ledger – Standard budget
 - Fund – BK001
 - Dept – D22010
 - Not Acct Cat 601, 603
4. Select the Report View: Summary by Year (Actuals)
5. What happened when you changed the report view?

6. Change Column Selectors to:
 - Column 1: Fund Fdescr
 - Column 2: Dept Fdescr
 - Column 3: Acct Type Fdescr
 - Column 4: Class
 - Column 5: Acct Cat Fdescr
 - Column 6: Account Fdescr
7. Write down the Balance Available for 2016

PART II: Refine the Multi-Year Summary Report

Refine the multi-year summary report by adding another report filter.

1. In the Report Filters, select

- Class: C0039 – User Defined (Upper Case)
- Click Apply Filters

2. Write down the Balance Available for 2016

PART III: Multi-Year Summary Report (Your Department)

Create a multi-year summary report for your department using your Golden 6.

1. Re-run the report, but change the report filters to use your Golden 6 (Remember to remove the report filters that you don't need).
2. Save as My Budget by Year.

Check for Understanding

1. (T / F) Changing Report Views can either increase or decrease the number of columns on the right-side of the report. _____
2. (T / F) You can refine your reports using Report Filters. _____
3. When you add Report Filters, the Balance Available
 - A. Increased
 - B. Decreased
 - C. Stayed the same
 - D. None of the above