

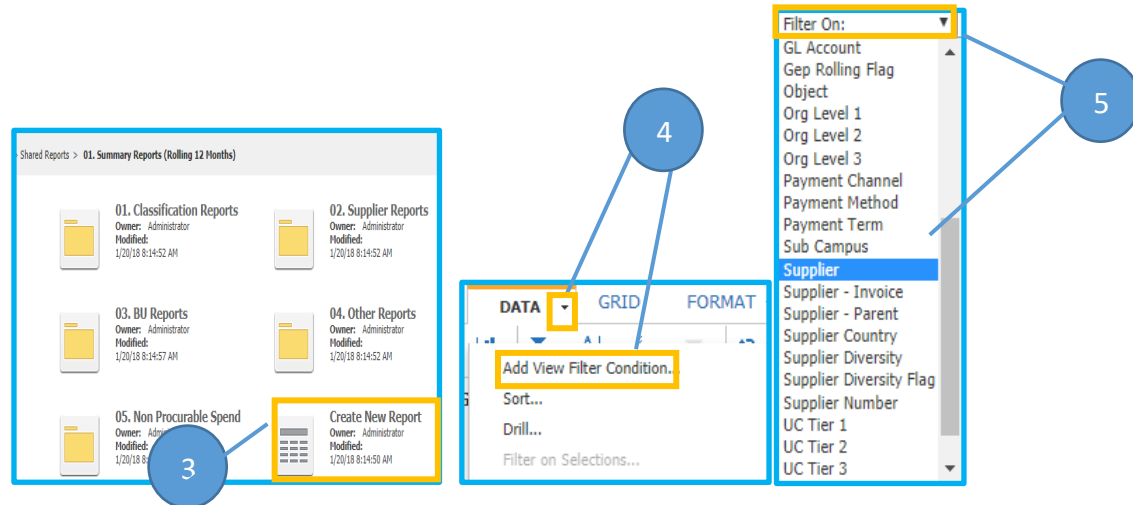
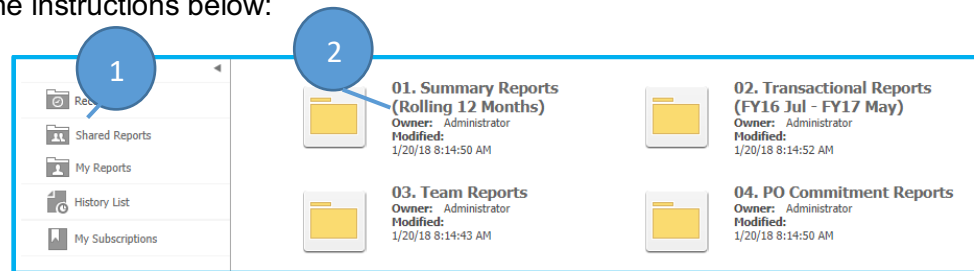
## Creating a New Report

The Analytical Report module provides two ways to create a custom report: 1) modifying an existing shared report and 2) creating a new report from scratch.

### Creating a new report

Analytical Reports can be accessed by clicking **Analyze** from the **Main Menu**, then clicking the **Spend Analytical Report** card on the **Analyze Menu**. On the Analyze Menu follow the instructions below:

1. Click **Shared Reports** in **Analytical Report**.
2. Click on **Summary Reports** (or any other **Shared Reports** folder.)
3. Click **Create New Report**.
4. Click the arrow next to **Data** and select **Add View Filter Condition** from the drop down list to display the **Filter On** dropdown list.
5. Select a filter option (e.g., Supplier) from the **Filter On** dropdown list.

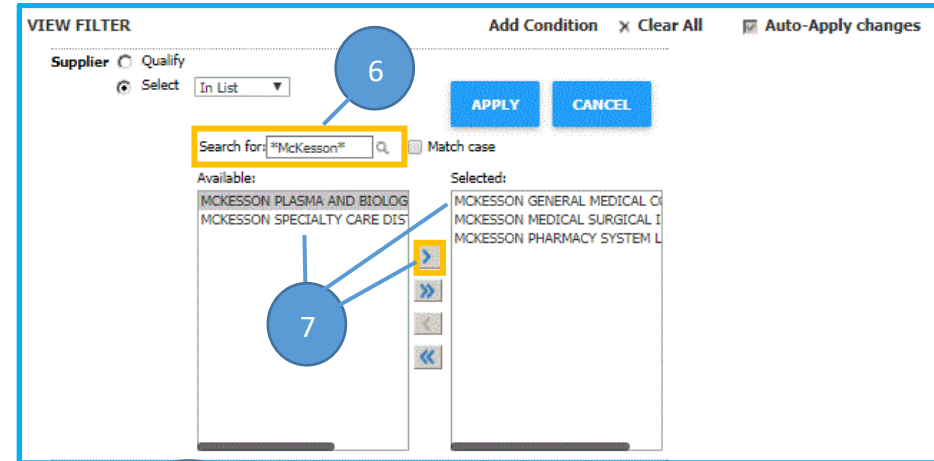


6. For long lists, enter a search term with asterisks in the **Search for** field to limit the search results. Press enter or click on the magnifying glass to execute the search function.

**Note:** See the 'Search Criteria QRG' for more information on how to use search criteria.

7. Select the item(s) that you want to filter in the **Available** field and click the right arrow button to move the term into the **Selected** field.

8. Click **Apply**.

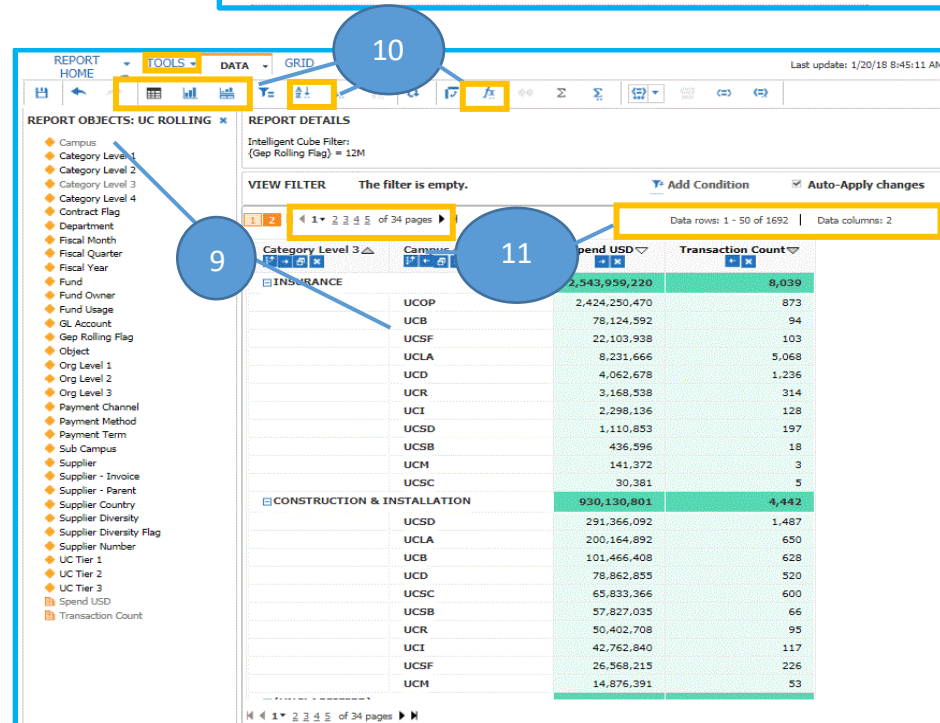


9. Drag one or more **Report Objects** into the right pane. This immediately filters the object by the condition you set.

**Note:** Spend and Transactions are automatically generated as report columns when you create a new report.

10. Use the **Grid**, **Graph** and the **Sort** and **Row /Column Swapping** features available by clicking on **Tools** or **Data** menu icon bars to customize the look of your report as needed.

11. Use the page row counter to navigate to different report pages. The Data row counter tells you how many records are in the report. The Data column counter tells you how many columns are in the report. Use the right arrow to view additional columns.



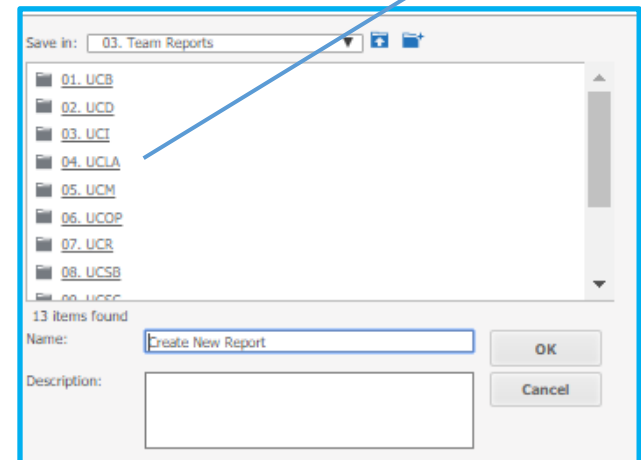
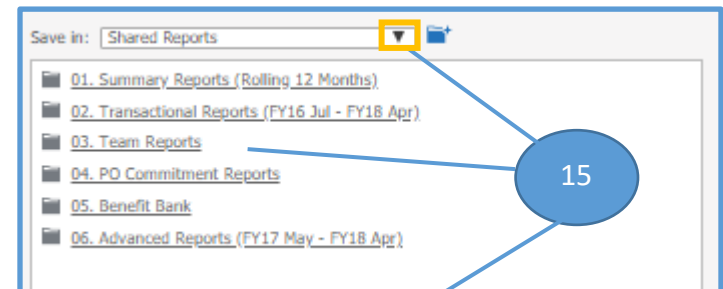
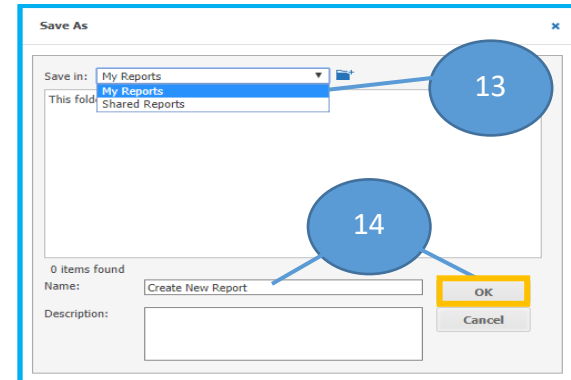
12. Click the **Save** icon on the icon bar to save your report.
13. Save the report created in the **My Reports** folder
14. Name the report and click **OK**.
15. Alternately, you can save your report with others in your campus by clicking **Shared Reports** from the **Save As** drop down, click **Team Reports** and then open and save the report to your campus folder.

## Notes

- You can add more filters to limit results by clicking and dragging more objects to get more targeted results.

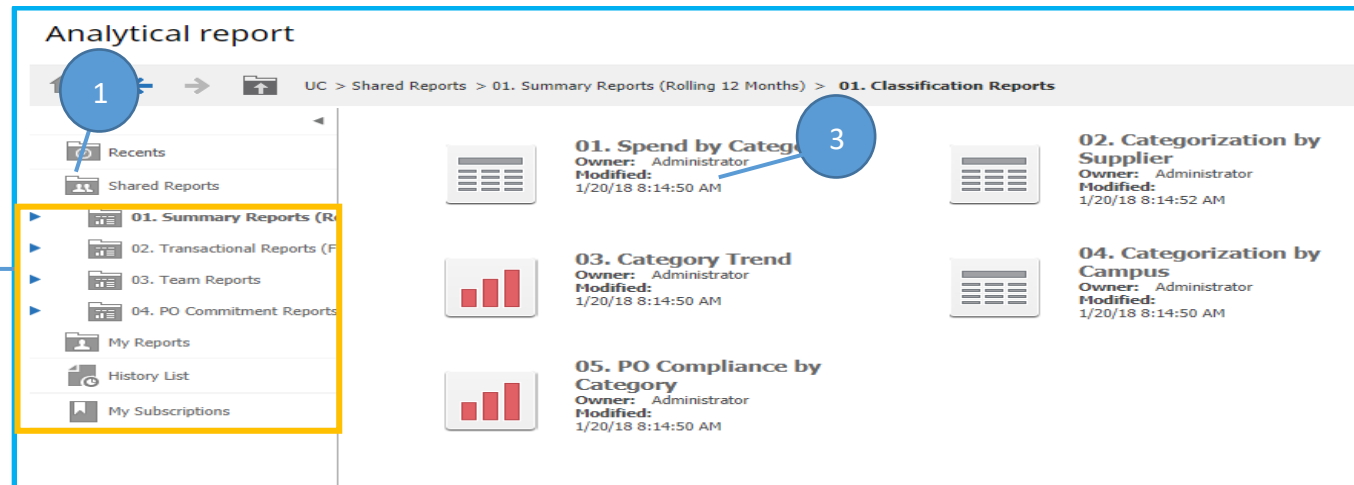
## Warning

- Your campus report folder is the only Shared Reports folder you can share a new or revised report to. If you attempt to save a new report to another Shared Reports folder the system will not give you an error message, but the report will not be saved to that folder.
- Do not leave a space before a search term as it may affect your results.



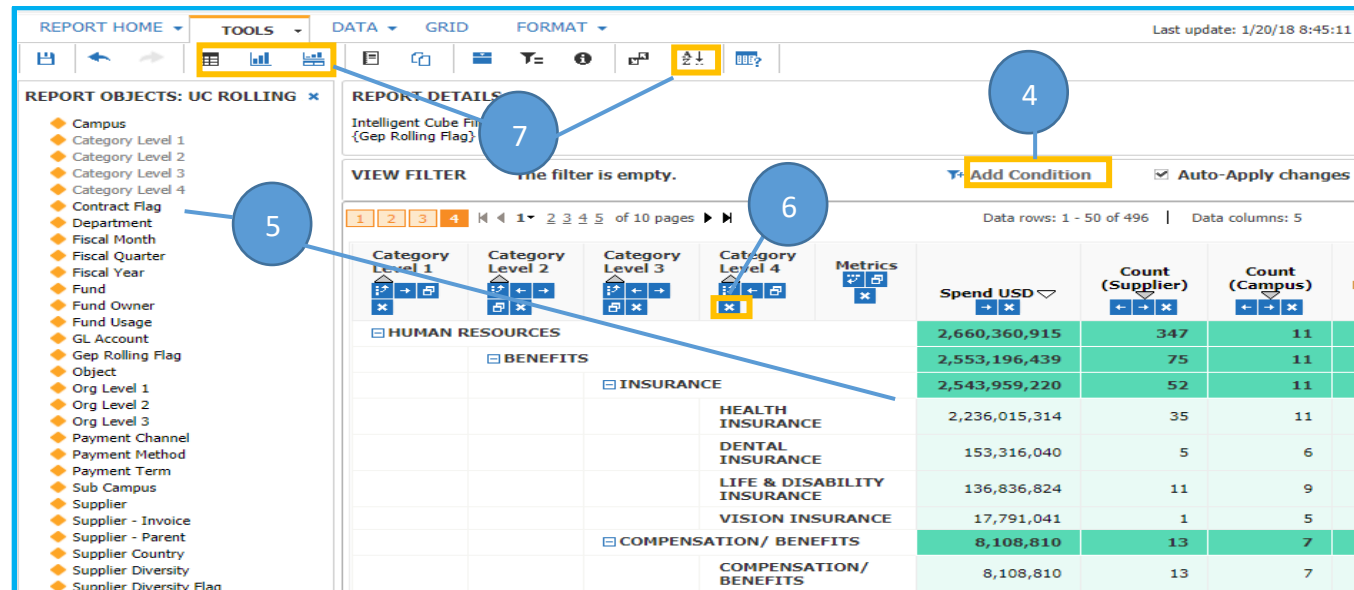
## Creating a new report by modifying an existing Shared Report

1. Click **Shared Reports** in **Analytical Report**.
2. Click on any report folder to open a list of reports.
3. Click on the report you want to modify.









Modify the report by a combination of any of the following:

4. Select **Add Condition** to add a filter.
5. Drag and drop a report object into the report grid to add it as a column.
6. Remove a column by clicking the **X** icon above.
7. Use the **Grid**, **Graph**, **Sort** and **Row /Column Swapping** icons to customize the look of your report as needed.
8. Save the report as described in *Creating a new report* above.



## Tips

- Add time period Report Objects to your report (Fiscal Year, Fiscal Month, Fiscal Quarter) to see trends over time that will tell you if spend amounts are growing or shrinking over time.
- Expand the report display to occupy the entire screen by clicking the Full Screen icon  in the upper right of the screen.
- Swap rows and columns by highlighting the desired rows and columns and clicking the Swap icon  in the Data Menu.
- Remove a column from the report by right clicking on the remove column button or by drag it back to left pane.
- Move columns by using the right arrow and left arrow   that display below each column header.
- Move a field in an up or down in the column by highlighting the field and clicking on the up and down arrows  .
- Graphs and Grids are most effective if you have few (less than 10) records, otherwise the graph or grid that displays could be difficult to read.
- You can also access grid and graph option from the Report Home drop down list.

## Warning

- Currently, Payment Terms have not been normalized across all campuses so this data is not recommended for reporting purposes at this time.