

Running basic 'multi-chartfield' reports.

1. Navigate to the page:
Main Menu > CWU Custom Functions > Reports > nVision Multi Chartfield Rpt
2. Select an existing run control, or add a new one:

Favorites | Main Menu > CWU Custom Functions > Reports > nVision Multi Chartfield Rpt

nVision Multi Chartfield RPT

Find an Existing Value | Add a New Value

Run Control ID:

Add

3. Select the Report ID (main Report type – CWEU15 in this example):

*Report ID PROJECT HISTORY REPORT

4. Select the Sub-Report ID (sub-report type – CWEU15-2 in this example):

*Sub Report ID Burn Rate Backup

5. Enter the As of Date for the report being run (2/28/2012 in this example):

*Through Date

6. Enter 1 in the Select Group Type box (there needs to be one section for each value in the Group Type dropdown):

*Select Group Type Chartfield or Group

7. Select the 'level' for the first group (Consolidated by Executive Level in this example):

*Select Criteria Type Consolidated by Execut. Level

8. Enter the Executive Level the report is being run for (BFA in this example), click the + and add additional rows to run reports on multiple areas within this level:

Customize Find View All First 1 of 1 Last	
Report Field Value	Description
1 <input type="text" value="BFA"/>	<input type="text" value="Business and Financial Affairs"/>

9. Click the + to the right of the Select Group Type and enter 2 in the new group:

*Select Group Type Fund or Group

10. Select Consolidated by Fund for the Select Criteria Type (for this example):

*Select Criteria Type Consolidated by Fund

11. Enter the Fund Groups that you want to run reports for (LOCAL in this example), click the + and add additional rows to run reports for multiple fund groups:

Customize Find View All First 1 of 1 Last	
Report Field Value	Description
1 LOCAL	Local Funds

12. At this point, the run control page should look like this (adjust accordingly):

nVision Multi Chartfield Rpt

Run Control ID: New_Run_Control [Report Manager](#) [Process Monitor](#)

Fill in the Report parameters, click Save(at the bottom), then click Run. Rur

*Report ID PROJECT HISTORY REPORT

*Sub Report ID Burn Rate Backup

*Through Date

Comments made by User manager.

Chartfield Groups Find First 1-2 of 2 Last

*Select Group Type Chartfield or Group

Selection Criteria Find | View All First 1 of 1 Last

*Select Criteria Type Consolidated by Execut. Level

Customize Find View All First 1 of 1 Last	
Report Field Value	Description
1 BFA	Business and Financial Affairs

*Select Group Type Fund or Group

Selection Criteria Find | View All First 1 of 1 Last

*Select Criteria Type Consolidated by Fund

Customize Find View All First 1 of 1 Last	
Report Field Value	Description
1 LOCAL	Local Funds

13. Click the Run Button to run the report(s).

14. There will be X reports Generated from this page, where X is the number of Report Field Values in Section 1 times the number of Report Field Values in Section 2. So in the above example there will be 1 report, for the BFA division on Local funds. If the Section 1 included BFA and ASL, and Section 2 included Local, State General, and Enterprise, there would be 6 total reports generated, one for each Executive level for each Fund Group.