

## Running Burn Rate and Burn Rate Backup Reports

1. Navigate to the nVision Multi Chartfield page and create a new run control (New\_Burn\_Rate\_Rpt):  
Main Menu > CWU Custom Functions > Reports > nVision Multi Chartfield Rpt  
Run controls on this page can only be used for one Report/Sub-Report combination.
2. After adding a new run control you should be presented with the following page to fill out:

nVision Multi Chartfield Rpt

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

Rur

\*Report ID  

\*Sub Report ID  

\*Through Date  

Comments made by User manager.

**Chartfield Groups** Find First 1 of 1 Last

\*Select Group Type   + -

**Selection Criteria** Find | View All First 1 of 1 Last

\*Select Criteria Type  

| Customize   Find   View All    First 1 of 1 Last |                                       |
|---|---------------------------------------|
| Report Field Value  | Description                           |
| 1 <input type="text"/>                             | <input type="text"/> <span>+ -</span> |

Message box to prompt Users what parameters should be entered.

 Save

 Notify

 Add

 Update/Display

The next steps will be selecting and filling out information for the above run control page, identifying the report, sub-report, through date, and criteria to filter the report on.

3. Select the Report ID by clicking on the magnifying glass next to the Report ID field (CWEU15):

## Look Up Report ID

**Business Unit:** CWUID  
**CW Report ID:** begins with

[Basic Lookup](#)

### Search Results

View 100 First  1-3 of 3  Last

| <u>CW Report ID</u>    | <u>Report Name</u>                      |
|------------------------|---|
| <a href="#">CWEU15</a> | <a href="#">PROJECT HISTORY REPORT</a>  |
| <a href="#">CWEU20</a> | <a href="#">PROJECT SUMMARY BY TYPE</a> |
| <a href="#">CWGL21</a> | <a href="#">FUND SUMMARY</a>            |

Select CWEU15 Project History Report (this is the 'burn rate' report)

4. Click on the magnifying glass next to the Sub-Report ID field and select the sub-report for the Project History report (CWEU15-1):

## Look Up Sub Report ID

**Business Unit:** CWUID  
**CW Report ID:** CWEU15  
**Sub Report ID:** begins with

[Basic Lookup](#)

### Search Results

View 100 First  1-3 of 3  Last

| <u>Sub Report ID</u>     | <u>Description</u>                  |
|--------------------------|-------------------------------------|
| <a href="#">CWEU15-1</a> | <a href="#">Burn Rate Report</a>    |
| <a href="#">CWEU15-2</a> | <a href="#">Burn Rate Backup</a>    |
| <a href="#">CWEU15-3</a> | <a href="#">Burn Rate w-Revenue</a> |

CWEU15-1 is the 'State General' version of the report showing only expense budgets and activity  
CWEU15-2 is the backup report showing the individual project ID's included in the History Report  
CWEU15-3 is a version including both revenue and expense rate analysis, as well as fund balance and budget info.

Select CWEU15-1 for this report request.

5. Enter the Through Date for the report(s) to be run, this is the 'as of' date (3/31/2012 in this example):

6. At this point the run control page should look like this:

nVision Multi Chartfield Rpt

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

Run

\*Report ID  PROJECT HISTORY REPORT

\*Sub Report ID  Burn Rate Report

\*Through Date

Comments made by User manager.

**Chartfield Groups** Find First 1 of 1 Last

\*Select Group Type

**Selection Criteria** Find | View All First 1 of 1 Last

\*Select Criteria Type

| Customize   Find   View All   First 1 of 1 Last |                      |
|---|----------------------|
| Report Field Value                              | Description          |
| 1 <input type="text"/>                          | <input type="text"/> |

Message box to prompt Users what parameters should be entered.

Save

Notify

Add

Update/Display

- Next select the Group Type for the first section by clicking on the magnifying glass next to the field, select 1 for the first section:

## Look Up Select Group Type

**CW Report ID:** CWEU15  
**Sub Report ID:** CWEU15-1  
**CW\_Series:** begins with   
**Description:** begins with

[Basic Lookup](#)

### Search Results

View 100 First 1-2 of 2 Last

| CW Series | Description                         |
|-----------|-------------------------------------|
| 1         | <a href="#">Chartfield or Group</a> |
| 2         | <a href="#">Fund or Group</a>       |

- On the Select Criteria Type field, select the appropriate level All (TC), Exec (TE), Div (TP), or Dept (TD), this will determine what level of reports are being run, lets select Department for this example:

## Look Up Select Criteria Type

**CW Report ID:** CWEU15  
**Sub Report ID:** CWEU15-1  
**CW\_Series:** 1  
**Chart Field:** begins with   
**Description:** begins with

[Basic Lookup](#)

### Search Results

View 100 First 1-4 of 4 Last

| Chart Field | Description                                   |
|-------------|---|
| TC          | <a href="#">Top Level of Tree</a>             |
| TE          | <a href="#">Consolidated by Execut. Level</a> |
| TP          | <a href="#">Consolidated by Department</a>    |
| TV          | <a href="#">Consolidated by Division</a>      |

- The run control page should look like this, and the next step is to add the departments that will be run and enter them in the Report Field Value area (click the + to the right of the field to add additional values):

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

**Run**

\*Report ID  PROJECT HISTORY REPORT

\*Sub Report ID  Burn Rate Report

\*Through Date

Comments made by User manager.

Chartfield Groups Find First 1 of 1 Last

\*Select Group Type  Chartfield or Group + -

Selection Criteria Find | View All First 1 of 1 Last

\*Select Criteria Type  Consolidated by Department

|   | Report Field Value   | Description          |   |   |
|---|----------------------|----------------------|---|---|
| 1 | <input type="text"/> | <input type="text"/> | + | - |

Message box to prompt Users what parameters should be entered.

Save

Notify

Add

Update/Display

Select some departments (21001, 30001, and 42001 as examples – hit the view all to display them all so

the page looks like this:

nVision Multi Chartfield Rpt

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

Run

\*Report ID  PROJECT HISTORY REPORT

\*Sub Report ID  Burn Rate Report

\*Through Date

Comments made by User manager.

**Chartfield Groups** Find First 1 of 1 Last

\*Select Group Type  Chartfield or Group + -

**Selection Criteria** Find View All First 1 of 1 Last

\*Select Criteria Type  Consolidated by Department

| Customize   Find   View 1   First 1-3 of 3 Last |                                    |  |                               |     |
|---|------------------------------------|--|-------------------------------|-----|
|   | Report Field Value                 |  | Description                   |     |
| 1   | <input type="text" value="21001"/> |  | Asst VP for Business & Fin Sv | + - |
| 2   | <input type="text" value="30001"/> |  | Central Budgets               | + - |
| 3   | <input type="text" value="42001"/> |  | College of the Sciences       | + - |

Message box to prompt Users what parameters should be entered.

Save

Notify

Add

Update/Display

10. Next step is to add the new Group Type by clicking the + to the right of Chartfield or Group in the above screenshot, this will add a new section to be filled out for the second set of criteria, after clicking the + button, the page should look like this:

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

**Run**

\*Report ID  PROJECT HISTORY REPORT

\*Sub Report ID  Burn Rate Report

\*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 Department

| Report Field Value |                                    | Description                   |   |   |
|--------------------|------------------------------------|-------------------------------|---|---|
| 1                  | <input type="text" value="21001"/> | Asst VP for Business & Fin Sv | + | - |
| 2                  | <input type="text" value="30001"/> | Central Budgets               | + | - |
| 3                  | <input type="text" value="42001"/> | College of the Sciences       | + | - |

---

\*Select Group Type  + -

**Selection Criteria** Find | View All First 1 of 1 Last

\*Select Criteria Type  Consolidated by Department

| Report Field Value |                      | Description          |   |   |
|--------------------|----------------------|----------------------|---|---|
| 1                  | <input type="text"/> | <input type="text"/> | + | - |

Message box to prompt Users what parameters should be entered.

Save

Notify

Add

Update/Display

Enter or Select 2 for the 2<sup>nd</sup> group type (2):

## Look Up Select Group Type

CW Report ID: CWEU15  
Sub Report ID: CWEU15-1  
CW\_Series: begins with   
Description: begins with

[Basic Lookup](#)

### Search Results

View 100 First  1-2 of 2  Last

| CW Series | Description                         |
|-----------|-------------------------------------|
| 1         | <a href="#">Chartfield or Group</a> |
| 2         | <a href="#">Fund or Group</a>       |

11. Select the level of grouping from the options available (TF):

## Look Up Select Criteria Type

CW Report ID: CWEU15  
Sub Report ID: CWEU15-1  
CW\_Series: 2  
Chart Field: begins with   
Description: begins with

[Basic Lookup](#)

### Search Results

View 100 First  1-4 of 4  Last

| Chart Field | Description                          |
|-------------|--------------------------------------|
| FC          | <a href="#">Fund Code</a>            |
| TC          | <a href="#">Top Level of Tree</a>    |
| TF          | <a href="#">Consolidated by Fund</a> |
| TH          | <a href="#">Fund Group</a>           |

FC – Fund Code – these are individual Fund Codes

TC – Top Level of Tree = All Funds

TF – Consolidated by Fund, these are fund groups such as State General, Enterprise

TH – State Fund Groups, these are the defined state fund groups including all internal CWU funds that roll up to those groups

Select TF from the list, and add the appropriate Fund Groups to the report field values.

12. Enter or Select the Fund Groups (State General, Local) in the Report Field Value area (after selecting State General and Local, the page should look like this):

nVision Multi Chartfield Rpt

Run Control ID: New\_Burn\_Rate\_Rpt

[Report Manager](#) [Process Monitor](#)

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

Run

\*Report ID  PROJECT HISTORY REPORT

\*Sub Report ID  Burn Rate Report

\*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 Department

| Report Field Value |                                    | Description                   |   |   |
|--------------------|------------------------------------|-------------------------------|---|---|
| 1                  | <input type="text" value="21001"/> | Asst VP for Business & Fin Sv | + | - |
| 2                  | <input type="text" value="30001"/> | Central Budgets               | + | - |
| 3                  | <input type="text" value="42001"/> | College of the Sciences       | + | - |

\*Select Group Type  Fund or Group + -

**Selection Criteria** Find | View All First 1 of 1 Last

\*Select Criteria Type  Consolidated by Fund

| Report Field Value |  | Description   |   |   |
|--------------------|--|---------------|---|---|
| 1                  | <input type="text" value="STATE GENERAL"/> | State General | + | - |
| 2                  | <input type="text" value="LOCAL"/>         | Local Funds   | + | - |

Message box to prompt Users what parameters should be entered.

Save

Notify

Add

Update/Display

13. Click Save at the bottom of the page, then click the Run button at the top right of the page. This run control will produce 6 reports, 3 departments \* 2 fund groups = 6 total reports produced. The values in the run control can be adjusted or changed for specific reports, this is just a basic how-to for filling out the

page, not specific instructions for running individual reports.