Running Burn Rate and Burn Rate Backup Reports

- 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 Process Monitor | |
| Fill in the Report parameters, click Save(at the bottom), then click Run. | Rur |
| Chartfield Groups Find First | 1 of 1 🖸 Last |
| *Select Group Type | + - |
| Selection Criteria Find View All First I of 1 | Last |
| *Select Criteria Type | |
| Customize Find View All 2 Hit First 1 of 1 Last Report Field Value Description 1 Q + | |

Message box to prompt Users what parameters should be entered.



🔄 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 w | rith 💌 | | |
| | | | | |
| Look Up | Clear | Can | cel <u>Basic Lo</u> | <u>okup</u> |

Search Results

| View 100 | First 💽 1-3 of 3 🕞 Last |
|--------------|-------------------------|
| CW Report ID | Report Name |
| CWEU15 | PROJECT HISTORY REPORT |
| CWEU20 | PROJECT SUMMARY BY TYPE |
| CWGL21 | FUND SUMMARY |

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 Uni CW Report ID Sub Report IE | t: CWUID : CWEU15 | | | |
| Look Up Clear Cancel Basic Lookup | | | | |
| Search Results | | | | |
| View 100 Fit | 'st 💽 1-3 of 3 💽 Last | | | |
| Sub Report ID | Description | | | |
| CWEU15-1 | Burn Rate Report | | | |
| CWEU15-3 | Burn Rate w-Revenue | | | |

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 | <u>Report Manager</u> | Process Monitor | |
| Fill in the Report parameters, click Save(at the bottom), ther 'Report ID CWEU15 'Sub Report ID CWEU15-1 'Sub Report ID CWEU15-1 'Through Date Comments made by User manager. | n click Run. PORT | | Rur |
| Chartfield Groups | | Find First 🚺 1 of 1 | ▶ Last |
| *Select Group Type | | | + - |
| Selection Criteria | <u>Find</u> View All | First 🚺 1 of 1 🖸 Last | |
| 'Select Criteria Type | | | |
| Customize Find Vie Report Field Value Description 1 Q | w All 🗖 🛗 First | torial distribution of the second sec | |

Message box to prompt Users what parameters should be entered.

| 🖶 Save | 🔚 Notify | E+ Add | 🔊 Update/Display |
|--------|----------|--------|------------------|
|--------|----------|--------|------------------|

7. 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:

| CW Report ID: | CWEU15 |
|----------------|---------------------------|
| Sub Report ID: | CWEU15-1 |
| CW_Series: | begins with 💌 |
| Description: | begins with 💌 |
| | |
| Look Up | Clear Cancel Basic Lookup |

Look Up Select Group Type

 Search Results

 View 100
 First 1-2 of 2
 Last

 <u>CW Series</u>
 <u>Description</u>

 1
 Chartfield or Group

 2
 Fund or Group

8. 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: Sub Report ID: CW_Series: | CWEU15 CWEU15-1 1 | |
| Chart Field: | begins with 💌 | |
| Description: | begins with 💌 | |
| Look Up Clear Cancel Basic Lookup | | |
| View 100 | First 💽 1-4 of 4 🕟 Last | |
| Chart Field Des | cription | |
| TC Top | Level of Tree | |
| TE Cor | nsolidated by Execut. Level | |
| TV Cor | nsolidated by Department | |
| | ISOIIDATED BY DIVISION | |

9. 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):

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 CWEU15 Q PROJECT HISTORY REPORT *Sub Report ID CWEU15-1 Q Burn Rate Report 03/31/2012 🛐 *Through Date Comments made by User manager. Chartfield Groups Find First K 1 of 1 🕨 Last + -1 🔍 *Select Group Type Chartfield or Group Selection Criteria Find View All First K 1 of 1 🕨 Last TP 🔍 *Select Criteria Type Consolidated by Department Customize | Find | View All | 🗖 | 🛗 First 🚺 1 of 1 D Las **Report Field Value** Description Q + -1 Message box to prompt Users what parameters should be entered.

🗐 Save 🔚 Notify

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

📑 Add

🔊 Update/Display

the page looks like this:

nVision Multi Chartfield Rpt

| un Conti | ol ID: New_Burn_R | ate_F | ?pt | <u>Report Manager</u> | Process | <u>Monitor</u> | |
|---|---|----------------------------|---|--------------------------------------|----------|----------------|----------|
| Fill in the * *Sub *Throu Con | Report parameters, c Report ID CWEU15 Report ID CWEU15-1 Igh Date 03/31/20 nments made by Use | lick S Q F Q F 12 | ave(at the bottom), then PROJECT HISTORY REP Burn Rate Report D ager. | click Run. PORT | | | Rur |
| Chartf | ield Groups | | | | Find | First K 1 of | 1 D Last |
| 'Sele | ct Group Type 1 | Q | Chartfield or Group | | | | Ŧ |
| Select *Select | ction Criteria ect Criteria Type | TP | Consolidated by | <u>Find</u> View All Department | First 🚺 | 1 of 1 🖻 Last | |
| | | | Customize Find View | - <u>1</u> 🗖 🛗 First 🛛 | 1-3 of 3 | Last | |
| | Report Field Value | | Description | Fig. Cu. | | | |
| 1 | 21001 | Q | Asst VP for Business & | FIN SV | | | |
| 2 | 30001 | Q | Central Budgets | | | + - | |
| 3 | 42001 | Q | College of the Science | S | | + - | |
| | | | | | | | |

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:

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. *Report ID CWEU15 PROJECT HISTORY REPORT *Sub Report ID CWEU15-1 Report *Sub Report ID CWEU15-1 Burn Rate Report *Through Date 03/31/2012 | Rur |
| Chartfield Groups Find First 🕻 1-2 | of 2 🕨 Last |
| *Select Group Type 1 Q Chartfield or Group | + - |
| Selection Criteria Find View All First 🚺 1 of 1 🖸 L | ast |
| *Select Criteria Type TP C Consolidated by Department | |
| Customize Find View 1 🖾 🛗 First 🗹 1-3 of 3 🗅 Last | |
| Report Field Value Description | |
| 1 21001 🔍 Asst VP for Business & Fin Sv 🛨 🖃 | |
| 2 30001 Q Central Budgets 🛨 🖃 | |
| 3 42001 🔍 College of the Sciences 🛨 🖃 | |
| | |
| *Select Group Type | ÷- |
| Selection Criteria <u>Find</u> View All First V 1 of 1 V L | ast |
| *Select Criteria Type | |
| Customize Find View 1 🔤 🛗 First 🚺 1 of 1 🖸 est | |
| Report Field Value Description | |
| | |
| | |

Message box to prompt Users what parameters should be entered.

🗐 Save 🔚 Notify

🕒 Add 🛛 🖉 Update/Display

Enter or Select 2 for the 2nd group type (2):

Look Up Select Group Type

| CW Report ID: | | | CWEU15 |
|----------------|-------------|---|----------|
| Sub Report ID: | | | CWEU15-1 |
| CW_Series: | begins with | ¥ | |
| Description: | begins with | ¥ | |
| | | | |

Cancel Basic Lookup

Search Results

Look Up

| View 100 Fi | rst 💽 1-2 of 2 🕞 Last |
|-------------|-----------------------|
| CW Series | Description |
| 1 | Chartfield or Group |
| 2 | Fund or Group |

Clear

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 | ¥ | |
| | | | |

| Look Up | Clear | Cancel | Basic Lookup |
|---------|-------|--------|--------------|
|---------|-------|--------|--------------|

Search Results

| View 100 F | First 💽 1-4 of 4 🕟 Last | | | | |
|-------------|-------------------------|--|--|--|--|
| Chart Field | Description | | | | |
| <u>FC</u> | Fund Code | | | | |
| <u>TC</u> | Top Level of Tree | | | | |
| <u>TF</u> | Consolidated by Fund | | | | |
| <u>TH</u> | Fund Group | | | | |

- 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 Cha | artfield Rpt | | | | | | |
|--|---------------|--------------------------------|---------------------------------------|-------------------|-----------------|--|--|
| Run Control ID: | New_Burn_Rate | _Rpt | <u>Report Manager</u> | Process Mor | itor | | |
| Fill in the Report parameters, click Save(at the bottom), then click Run. *Report ID CWEU15 PROJECT HISTORY REPORT *Sub Report ID CWEU15-1 Burn Rate Report Through Date 03/31/2012 Comments made by User manager. | | | | | | | |
| Chartfield Grou | lps | | | <u>Find</u> First | 1-2 of 2 🖸 Last | | |
| *Select Group | Type 1 🔍 | Chartfield or Group | | | + - | | |
| Selection Crit | teria | | <u>Find</u> View All | First 🚺 1 of 1 | Last | | |
| *Select Criter | ria Type 🗌 🗌 | Consolidated by | y Department | | | | |
| | | Customize Find Viev | <u>w 1</u> 🗖 🛗 First | 🛾 1-3 of 3 🖸 1 | Last | | |
| Report F | ield Value | Description | | | | | |
| 1 21001 | Q | Asst VP for Business | & Fin Sv | + | | | |
| 2 30001 | Q | Central Budgets | | + | | | |
| 3 42001 | Q | College of the Science | es | + | | | |
| | | | | | | | |
| *Select Group | Type 🛛 🔍 | Fund or Group | | | + - | | |
| Selection Crit | teria | | <u>Find</u> View All | 🛛 First 🚺 1 of ' | 🚺 🖸 Last | | |
| *Select Criter | ria Type 🔤 | Consolidated by | y Fund | | | | |
| | | <u>Customize Find Viev</u> | <u>w 1</u> 🗖 🛗 First | 🗹 1-2 of 2 🕨 | Last | | |
| Report F | ield Value | Description | | | | | |
| 1 STATE (| GENERAL | State General | | + | | | |
| 2 LOCAL | Q | Local Funds | | + | | | |
| | | | | | | | |

Message box to prompt Users what parameters should be entered.



- 🔄 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.