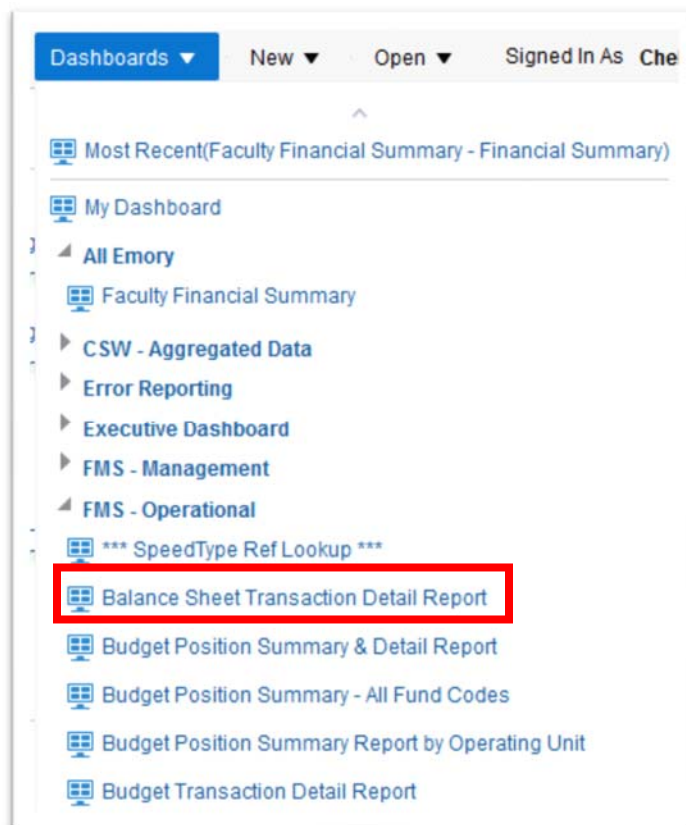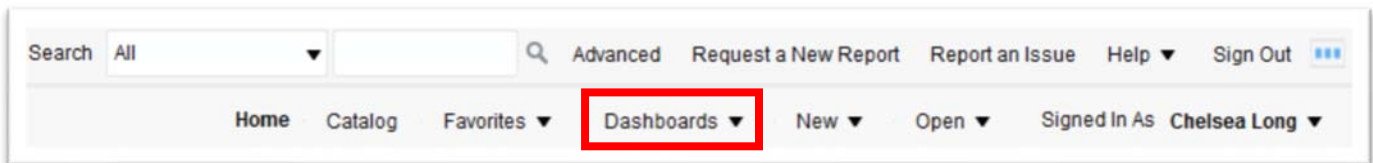# Documenting Saved Customizations

Overview

Dashboards are generically designed for wide-spread campus use. Users have the option to customize most dashboards to meet their individual reporting needs. These customizations are specific for the user that created them and are not available for others to view or use in EBI. It is recommended that users document how they create all of their customizations. The documentation can then be shared with other users for them to recreate the customization.

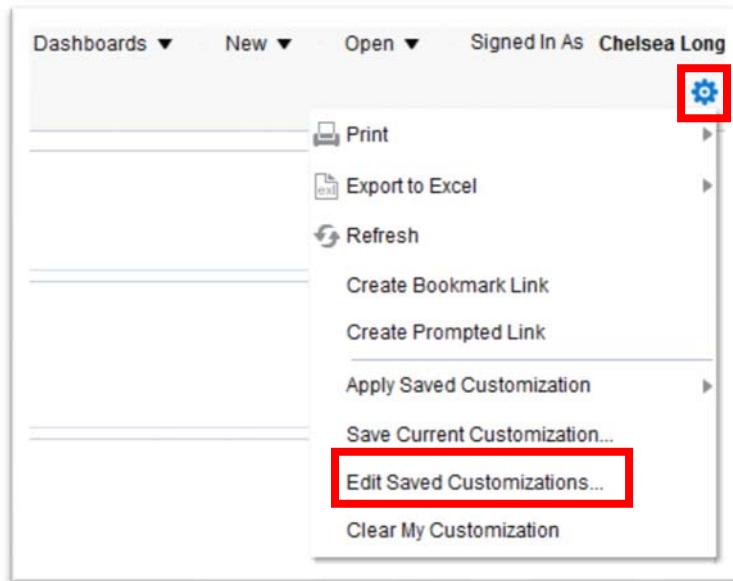## Create a list of your Customizations

1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards menu in the upper right corner and select the dashboard with saved customizations
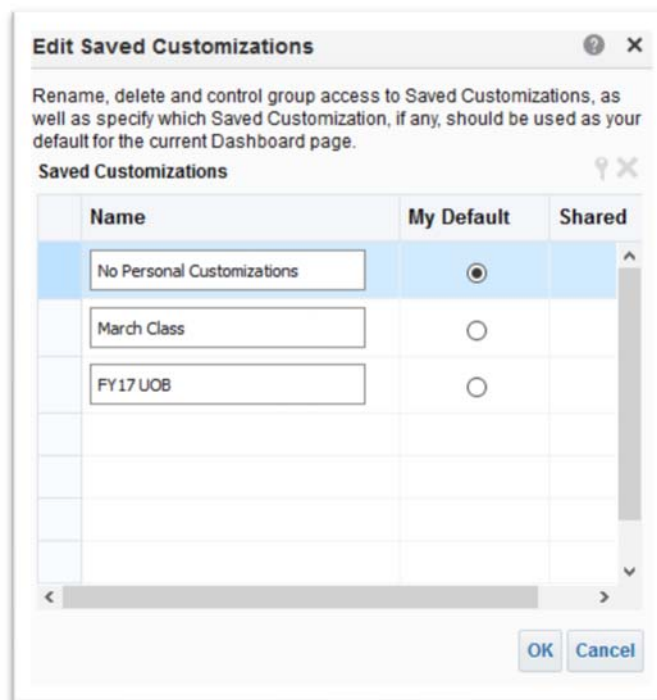
Documenting Saved Customizations

3. Click on the Page Options Menu and select "Edit Saved Customizations…"

4. Copy the names of your Saved Customizations for this dashboard.

Documenting Saved Customizations

5. Create your list of Customizations in Microsoft Word (or other tool of choice) for each Dashboard, example below.

> **Dashboard:** Budget Position Summary & Detail Report – Unrestricted Operating Budgets
> **Customization Name:** March Class (followed by layout and prompt screenshots)
> **Customization Name:** FY17 UOB (followed by layout and prompt screenshots)

Document the layout of your Customizations

1. Apply one of your customizations to the Dashboard by clicking the Page Options menu and selecting "Apply Saved Customization…"
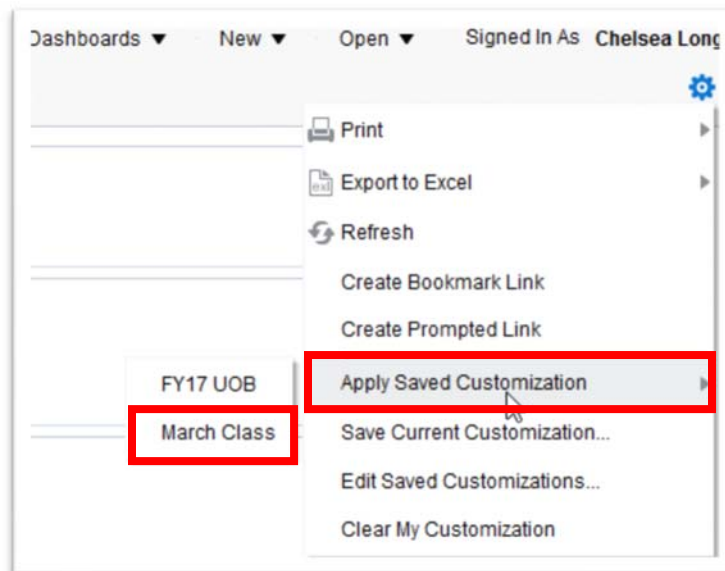
2. Take a screenshot of the dashboard to show the layout of your customization. This will show the order of your columns and anything that may have been included or excluded. Paste this into your Word document under the Customization Name.

Documenting Saved Customizations
Document the Prompt Values of your Customizations

1. Scroll to the bottom of the Prompts section and take a screenshot of your Prompt Values. Paste this into your Word document under the screenshot of your customization layout.

2. For any prompts that have multiple values, select the prompt drop-down menu and click "Search..."

Documenting Saved Customizations

3. Click on the Pencil icon in the top right corner. Select all of the text, then right click and select Copy. Paste the text into your Word document. You can use this process to paste the text for that prompt in a new customization, instead of searching for each value.
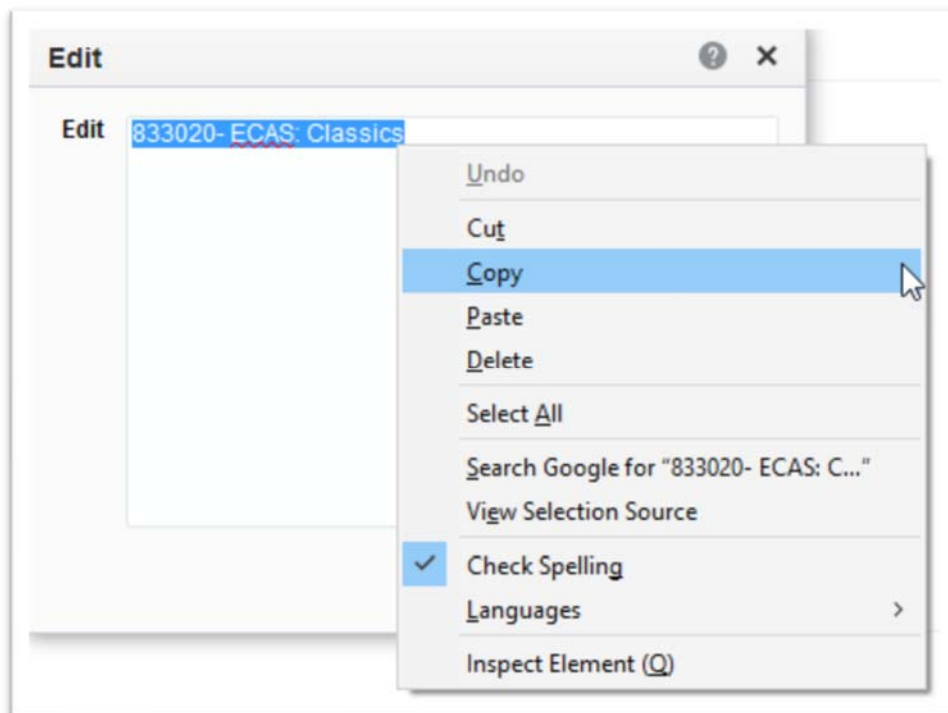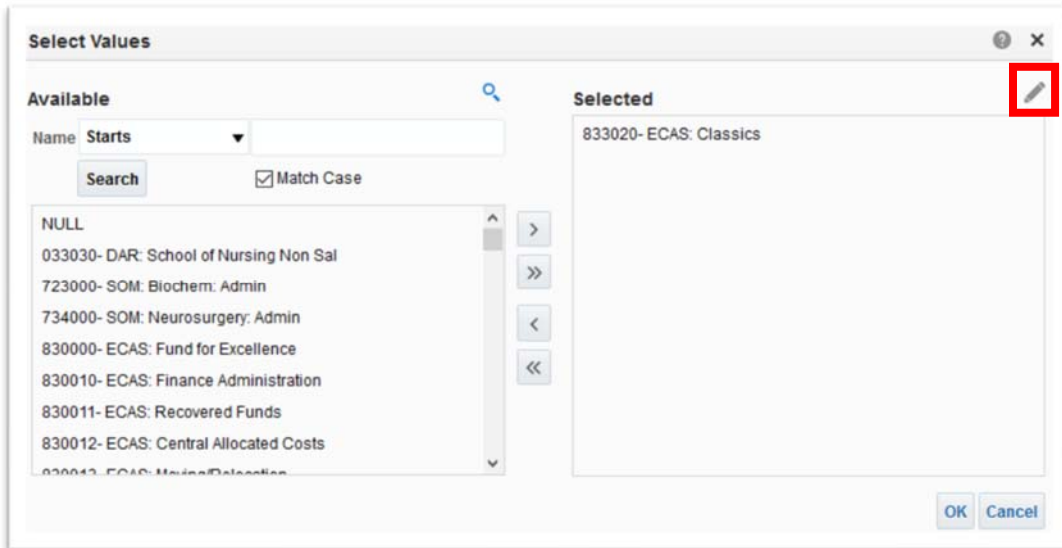
Documenting Saved Customizations
A sample of what your documentation could look like is provided below.

EBI Dashboard Customization Documentation Sample

Dashboard: Budget Position Summary & Detail Report – Unrestricted Operating Budgets
Customization Name: March Class

* Indicates Required Field.
Also note: Report will return results of the entire Accounting Period of the Begin or End date. For example '12/10/2012' would include all dates greater '12/01/2012' and less than or equal to '12/31/2012', the last day in the Accounting Period.

PROMPT VALUES:
AS OF DATE 08/09/2018
BUSINESS UNIT (All Column Values)
PROGRAM (All Column Values)
OPERATING UNIT 10000- Emory College
DIVISION (All Column Values)
DEPARTMENT 833020- ECAS: Classics
EVENT (All Column Values)
FUND (All Column Values)
CLASS (All Column Values)
OPERATOR ID Chelsea Long

Department Prompts:

833020- ECAS: Classics

831000- ECAS: Biology

832000- ECAS: Anthropology

832050- ECAS: History

Customization Name: FY17 UOB

REPEAT THIS PROCESS FOR ALL SAVED CUSTOMIZATIONS.

Documenting Saved Customizations

More Information:

For additional assistance, please contact the Analytics & Reporting team via the **Finance Support Center**. Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.