



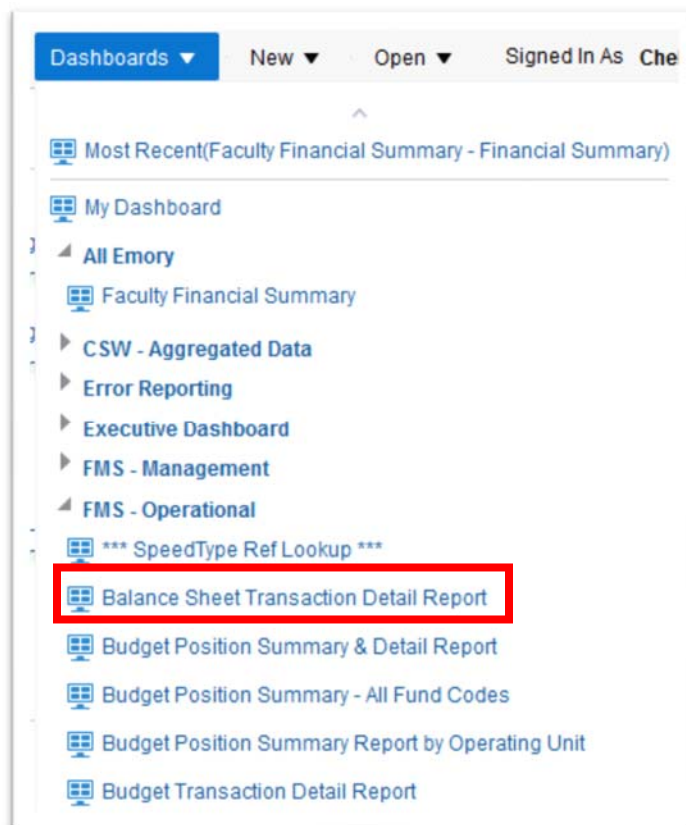
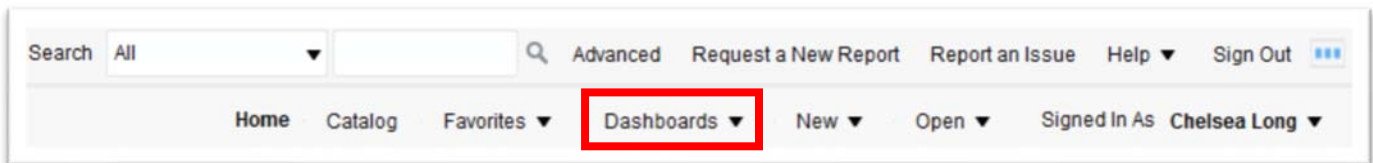
Documenting Saved Customizations

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

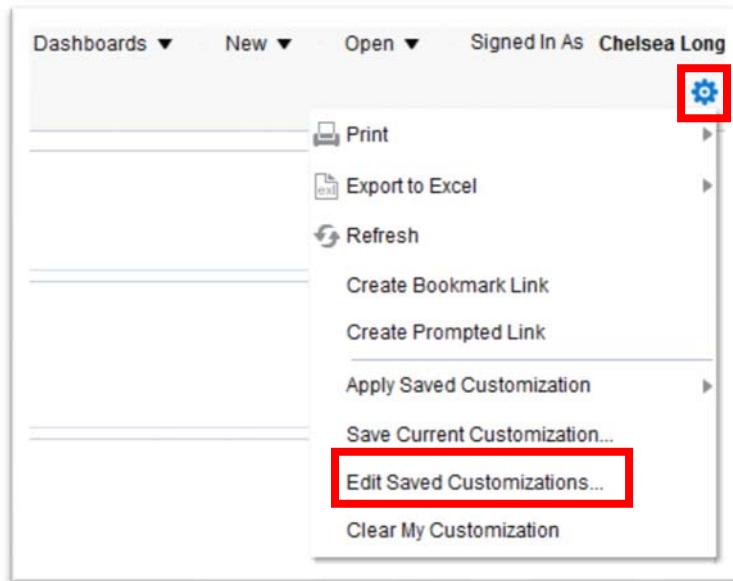
1. Log in to EBI: <https://dwbi.emory.edu/analytics>
2. Click on the Dashboards menu in the upper right corner and select the dashboard with saved customizations



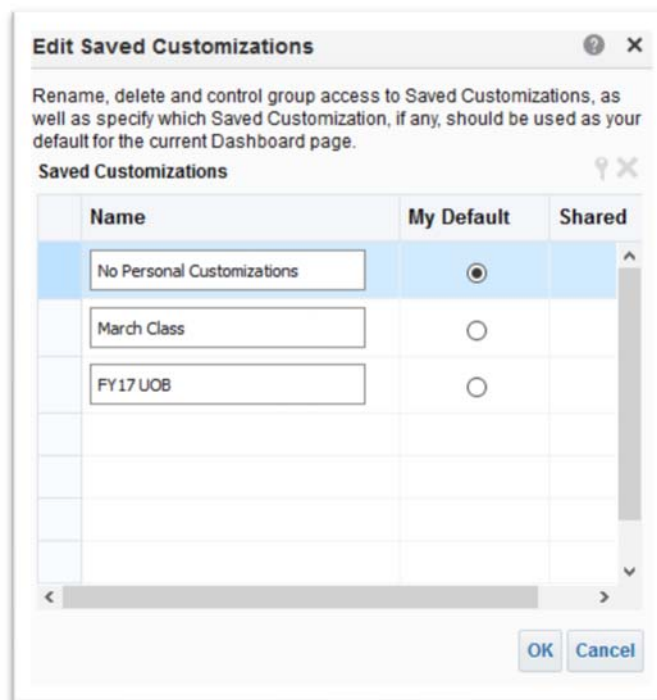


Documenting Saved Customizations

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.

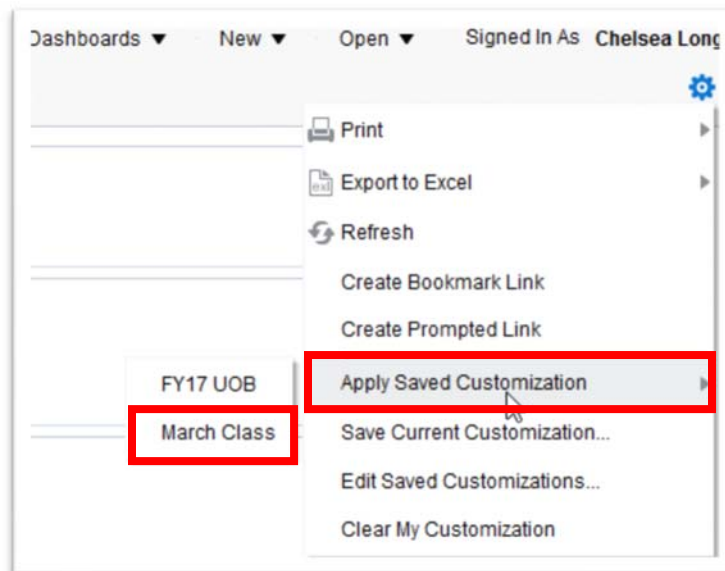
Dashboard: Budget Position Summary & Detail Report – Unrestricted Operating Budgets

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.

UOB FORMAT: UOB Detail

Department	Account Class	Account Group	Account Category	Account	Fund	Original Budget (\$)	Budget Revision (\$)	Budget	MTD Actual (\$)	FYTD Actual (\$)	LTD Encumbrance (\$)	Budget Variance (\$) Favorable / (Unfavorable)	% Used FYTD
833020- ECAS Classics	Expenses	Salary & Fringe Benefits	Student Salaries	50200- EDG-Student Salaries	1002	1,950.00	16,227.00	18,177.00	0.00	0.00	0.00	18,177.00	
				50210- Sal - Ungrd Student FICA Exempt	1002	0.00	0.00	0.00	0.00	24.00	0.00	(24.00)	
				50230- Sal - Grad Student FICA Exempt	1002	0.00	0.00	0.00	0.00	16,140.34	0.00	(16,140.34)	
				50240- Sal - Work Study FICA Exempt	1002	0.00	0.00	0.00	0.00	457.66	0.00	(457.66)	
			Student Salaries Total			1,950.00	16,227.00	18,177.00	0.00	16,822.03	0.00	1,554.97	91.45%
		Salary & Fringe Benefits Total			1,950.00	16,227.00	18,177.00	0.00	16,822.03	0.00	1,554.97	91.45%	
		General operating expenses	Consulting Services	52100- Prof Fees - Honorariums	1002	0.00	0.00	0.00	858.00	1,338.67	0.00	(1,338.67)	
				52190- Prof Fees - Other	1002	0.00	0.00	0.00	82.50	235.50	0.00	(235.50)	
			Consulting Services Total			0.00	0.00	0.00	932.50	1,574.17	0.00	(1,574.17)	
			Supplies	53200- Supplies - Office Exp	1002	0.00	0.00	0.00	758.36	2,052.78	25.00	(2,078.68)	
				53210- Supplies - Computer Exp	1002	0.00	0.00	0.00	0.00	68.00	0.00	(68.00)	
				53600- Supplies - Other	1002	0.00	0.00	0.00	0.00	22.00	0.00	(22.00)	
53800- Supplies - Noncap Equipment						0.00	0.00	0.00	0.00	(0.00)	0.00		
833020- ECAS - Classics						1,950.00	16,227.00	18,177.00	0.00	16,822.03	0.00	1,554.97	91.45%



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.

* 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

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

Department

833020- ECAS: Classics ▼

☐ 832080- ECAS: Sociology

☐ 832090- ECAS: Women's Studies

☐ 833000- ECAS: African American Studies

☐ 833010- ECAS: Art History

☐ 833011- ECAS: Art Hist Slide Library

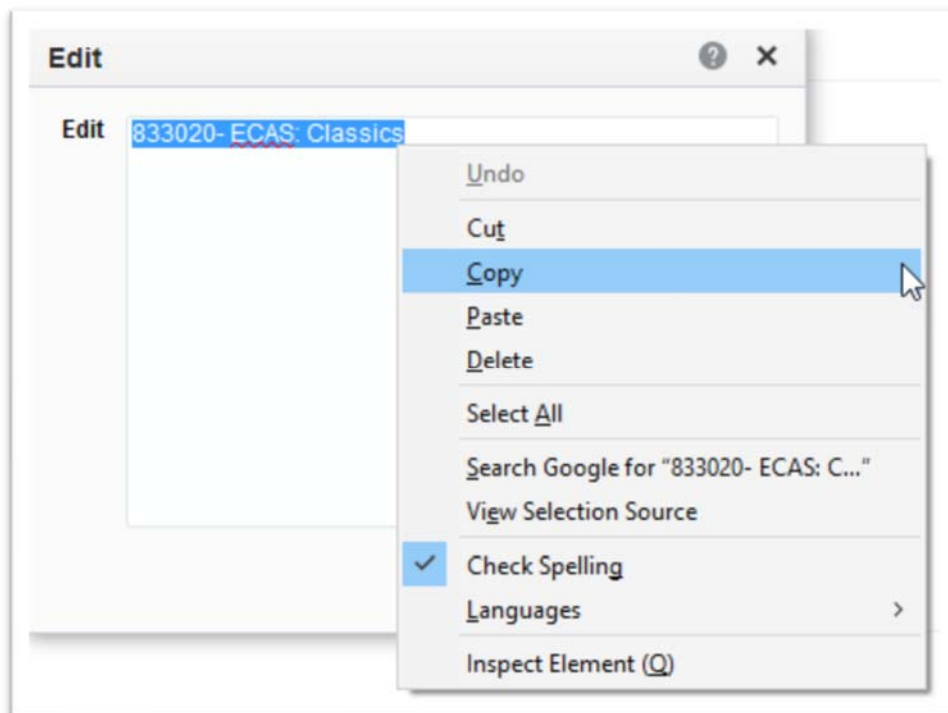
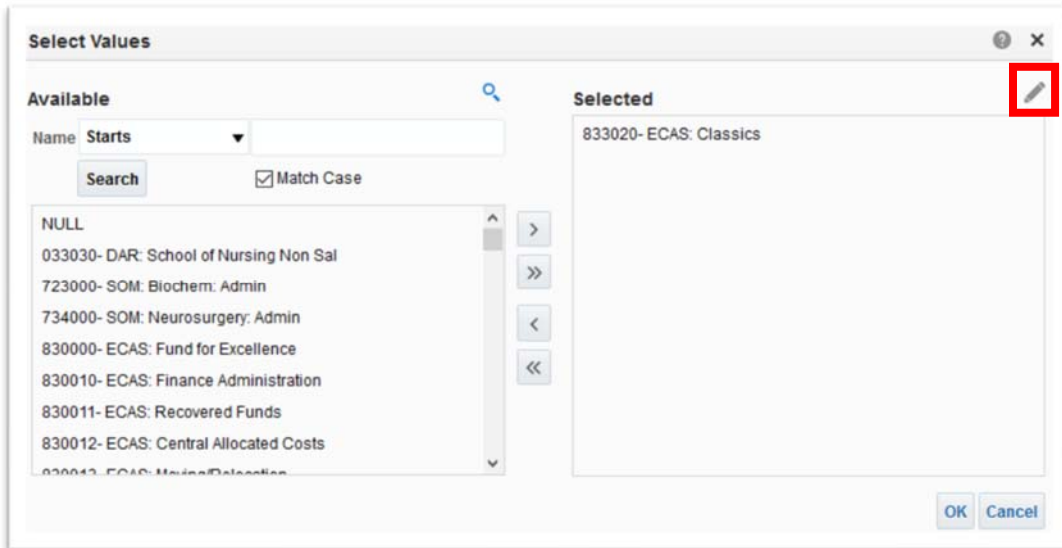
☒ 833020- ECAS: Classics

Search...



Documenting Saved Customizations

- 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

UOB FORM 677 UOB Detail															
Department	Account Class	Account Group	Account Category	Account	Fund	Original Budget (\$)	Budget Revisions (\$)	Budget	MTD Actual (\$)	FYTD Actual (\$)	LTD Encumbrance (\$)	Budget Variance (\$): Favorable (1)	% Used FYTD		
833020- ECAS Classics	Expenses	Salaries & Fringe Benefits	Student Salaries	90200- REG-Student Salaries	1000	1,800.00	16,227.00	18,127.00	0.00	0.00	0.00	18,127.00			
				90210- Sub -Unreg Student PCA Empl	1002	0.00	0.00	0.00	0.00	24.00	0.00	(24.00)			
				90230- Sub -Over Student PCA Empl	1002	0.00	0.00	0.00	0.00	18,140.34	0.00	(18,140.34)			
				90240- Sub -Over Study PCA Empl	1002	0.00	0.00	0.00	0.00	607.66	0.00	(607.66)			
				Student Salaries Total		1,800.00	16,227.00	18,127.00	0.00	18,822.00	0.00	1,694.87	91.45%		
		Salaries & Fringe Benefits Total						1,800.00	16,227.00	18,127.00	0.00	18,822.00	0.00	1,694.87	91.45%
		General operating expenses	Consulting Services	52100- Prof Fees - Monographs	1002	0.00	0.00	0.00	859.00	1,238.07	0.00	(1,338.07)			
				52100- Prof Fees - Other	1002	0.00	0.00	0.00	52.55	235.55	0.00	(235.55)			
			Consulting Services Total				0.00	0.00	0.00	911.55	1,473.62	0.00	(574.17)		
			Supplies	53200- Supplies - Office Exp	1002	0.00	0.00	0.00	758.30	2,452.78	20.90	(2,679.68)			
53210- Supplies - Computer Exp	1002			0.00	0.00	0.00	0.00	0.00	58.00	0.00	(58.00)				
53600- Supplies - Other	1002	0.00		0.00	0.00	0.00	0.00	22.00	0.00	(22.00)					
53800- Supplies - Nonexp Equipment			1002	0.00	0.00	0.00	0.00	0.00	(5.85)	5.85					
53910- Supplies - Software			1002	0.00	0.00	0.00	0.00	0.00	310.00	0.00	(310.00)				

* 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.