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| **C:\Users\pmo6\Desktop\HSU\CircleH_green 150x150(300).jpg** |  | QUESTICA BUSINESS PROCESS GUIDE |

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| **DATE CREATED** | **PROCESS NAME** |
| September 20, 2019 | Analytics Center Module |
| **PROCEDURE NO.** | **PROCESS OWNER** |
| 004 | Questica Campus Users |
| **DATE OF LAST UPDATE** | **LAST UPDATED BY** |
| September 20, 2019 | Patrick Orona |

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## INTRODUCTION

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| **PURPOSE** | Overview of Analytics Center functionality and working with Ad hoc views. |
| **SCOPE** | Scope of this document pertains to Humboldt State University’s version of Questica Budgeting software. Topics include Questica Analytics Center functionality and working with Ad hoc views. |
| **DOCUMENT MANAGEMENT** | University Budget Office (UBO) retains all copies of Business Process Guides (BPG) and handles distribution. |

## PROCESS

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| --- | --- |
| **OVERVIEW** | Screenshots provided for this Business Process Guide (BPG) are from the Analytics Center Module and editing within Ad hoc views. |
| **STEP** | **ACTIVITY** |
| Analytics Center Filters | |
| To view all reports and ad hoc views click on **Analytics** module in the left **panel** |  |
| To quickly filter through reports and ad hoc views click through options at the top right. **My items** return bookmarked and user created reports. |  |
| Users can search for a report by typing the name of the report in the search bar.  Users can also filter by **All Categories** and / or **All Contexts** from the drop down lists. |  |
| Lastly, Users can filter by Reports or Ad Hoc Views |  |
| To set up **Report Schedules** and **Report Parameters Sets** click on **Report Tools** at the top right |  |
| Report Parameter Set | |
| To save parameters click on **Report Parameters Sets** seen from the screenshot above.  In the new view click on **+ New Report Parameters Sets** |  |
| A dialog box will appear. Select a report from the drop-down list and name the parameter set. |  |
| In the **Parameters** tab go through each of the fields selecting from the drop-down menus and click OK once finished. |  |
| Preset parameters for the report has now been saved. |  |
| Report Schedules | |
| To schedule reports click on **Report Schedules** in the Analytics Module under **Report Tools.**  In the new view click on **+ New Report Schedule** |  |
| A dialog box will open. Select a report from the drop-down list and fill out all required fields outlined in red.  To send the report to other users check the box by their name. |  |
| In the **Scheduling** tab select the frequency in which the report is to be ran and sent as seen to the right. |  |
| In the **Parameters** tab select desired parameters from the drop down lists. If saved Report Parameters have already been created, select it from the **Auto-Fill** drop down list and click OK. |  |
| Report Schedule record has now been created. To Edit the name, right click on the record.  To open and Edit, double click on the record. |  |
| Lastly, select **Publish** to have reports emailed to you based on the schedule set. |  |
| Reports can now be ran using saved Report Parameters and Report Schedules from the report drop down list in the Analytic Center. |  |
| Ad Hoc Views | |
| Ad Hoc Views allow users to choose from available fields (columns) to create a grid to build dashboards, reports and export to excel. | The UBO has created and shared the **Account Structure Summary Ad Hoc view** which compares Budget to Actuals. In this exercise we will copy over and edit this Ad Hoc View. |
| Select **Copy** to the far right. A dialog box will appear. Rename the Ad Hoc View and click OK |  |
| Users can now **Edit**, **Delete**, and **Publish**. Next click **Run Ad Hoc View**  The Publish option is for report building which will not be covered in this BPG. |  |
| A blank window will appear. Click **Search** to start returning rows of data. |  |
| Search, Right Click and Export functionality is the same as the Budgets grid in the Operating Module. See *BPG 002 & 003* for details. |  |
| To Edit select **Edit Ad Hoc View** |  |
| A dialog box will appear. Users can edit Name, Description and Report Categories as appropriate. |  |
| To Remove, Copy or Add a **Column** see screenshot to the right. |  |
| To change aggregation type click the arrow for the drop down list.  To reorder columns click on the double arrows and drag. |  |
| Much like an Advanced Search, after clicking the + button as shown above a **Field Picker** will appear,  Begin typing in the search bar to return desired fields and click OK. |  |
| To Filter the Columns selected click the + button to add criteria.  A field picker will appear just as seen above. Filter operates just like Advanced Searches | For this example ad hoc view, we need to ensure that we only show results for “active” budgets – that is, Scenarios that are marked “Active”, and Fund Departments that are “Active”. To achieve this, we would create the first two filters below: |
| If Aggregation has been enabled in the Columns tab interface, filters can be applied to the aggregated values of the selected Fields. | The interface differs from the standard Advanced Search as the fields available for selection are limited to the Columns that have previously been selected.  However associating a field, operator and value works the same way.  If we wanted to Enable Aggregation and select the amount of “Sum of Current Year Budget” as a field, we can exclude results that equal to 0 with the following filter:   * Sum of Current Year Budget> Does Not Equal > 0 |
| The **Layout** interface provides you the ability to specify the Sorting and Grouping of the results, set the column widths, show subtotals for grouped data, show columns of grouped data. Click **Preview** to return the first 100 records. |  |
| **Sharing** provides the ability to share and the View with other users.  You can add users to share the View by clicking on the **Add Users**.  A pop up will appear allowing you to select a user(s). |  |
| Users then have two permission options: **View** and **Edit** |  |
| One reason to create Views is to allow users to write reports and create dashboards against the data they need.  To identify which reports are dependent on any given ad hoc the **Dependencies** tab would list them here. |  |

## CHANGE HISTORY

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| **Section** | **DESCRIPTION OF CHANGE IMPLEMENTED** | **Date** | **COMPLETED BY** |
| Report Schedules | Select **Publish** to have reports emailed to you based on the schedule set. | 9/30/19 | Patrick Orona |