

Insight Quick Reference | Create a Managerial Report

Create a managerial report to:

- Present a summary of data with the option of drilling down into further detail
- · Analyze relationships between data from two different reports
- · Provide managers with a synopsis

Managerial Reports Available in the Common Report Library:

Awards, Leave Data and Usage, Leave Lump Sum Pay Liability, Overtime, Personnel Action Requests (PAR) by Nature of Action (NOA) Codes Summary, Retirement Eligibility, Time Contribution to Union Activities

Executive High-level Information Managerial Mid-level detail with optional drill down Operational Low-level detail

1 Create an Action Link

- 1. Navigate to the **Selected Columns** pane from the **Criteria** tab.
- 2. Click the **Edit** icon for the targeted data element and select **Column Properties** from the drop-down menu.
- 3. Navigate to the *Interaction* tab.



- 4. Use the Primary Interaction drop-down menu to change the **Primary Interaction** to Action Links.
- 5. Click the **New** icon to open the New Action Link window.



6. Select Navigate to BI Content from the drop-down menu.



7. Navigate to the *Folders* pane to select the existing report from the Catalog targeted for the drill-down. Click OK.

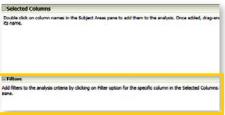


- 8. View the Create New Action window and click **OK**.
- 9. View the New Action Link window which has updated with the report selected in the previous step. Click **OK**.
- 10. Click the **Do not display in a popup if only one action link is available at runtime** check box from the Interaction tab. Click **OK**.

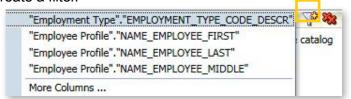


2 Add an Is Prompted Filter

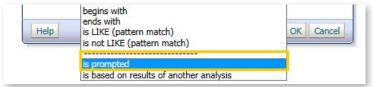
1. Navigate to the *Criteria* tab of the managerial report and locate the Filters pane.



2. Click the **Filters** icon and select the data element on which to create a filter.



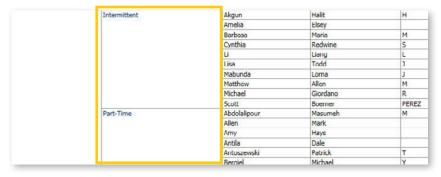
3. From the Operator drop-down, select Is **Prompted**. Click **OK**.



- 4. Click the **Save** icon to save the managerial report with the **Is Prompted** filter.
- 5. Click the **Catalog** action link in the top navigation bar and navigate to the drill-down report.
- 6. Navigate to the *Criteria* tab of the drill-down report and locate the *Filters* pane.
- 7. Click the **Filters** icon and select the data element on which to create a filter.
- 8. From the Operator drop-down, select **Is Prompted**. Click **OK**.
- 9. Click the **Save** icon to save the drill-down report.

3 Drill-Down in a Managerial Report

1. Navigate to the saved managerial report and run the report with the **Is Prompted** filter added to the managerial report and drill-down reports. The values in the column targeted with the action link will be hyperlinked.



2. Click the hyperlinked values and the drill-down report appears, filtered by the selection.

