



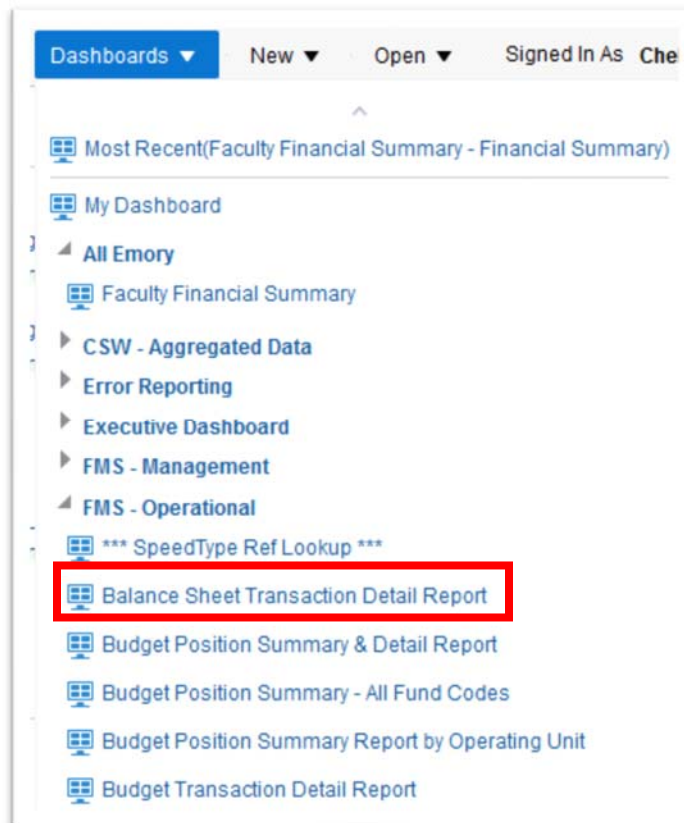
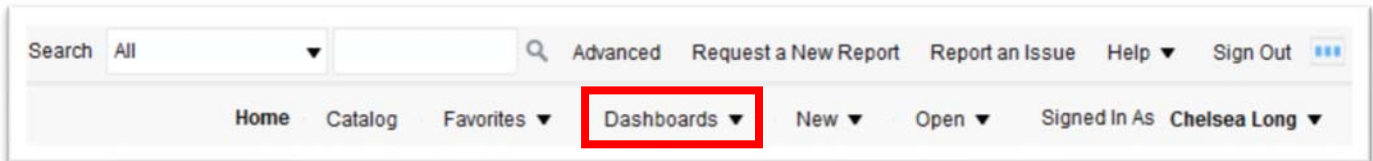
Documenting Saved Customizations

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

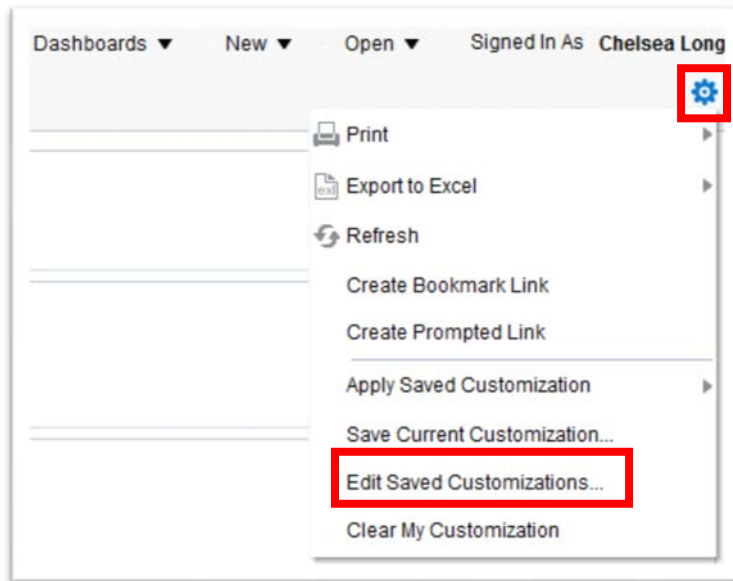
1. Log in to EBI: <https://dwbi.emory.edu/analytics>
2. Click on the Dashboards menu in the upper right corner and select the dashboard with saved customizations



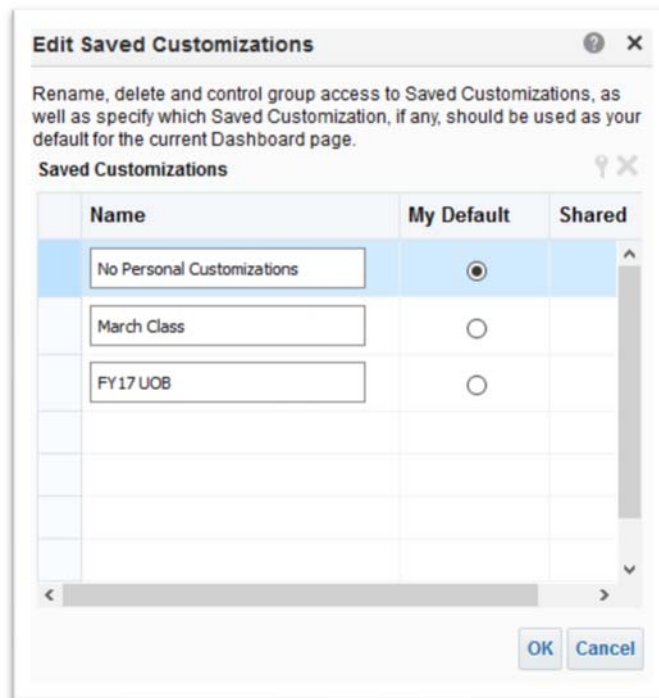


Documenting Saved Customizations

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.

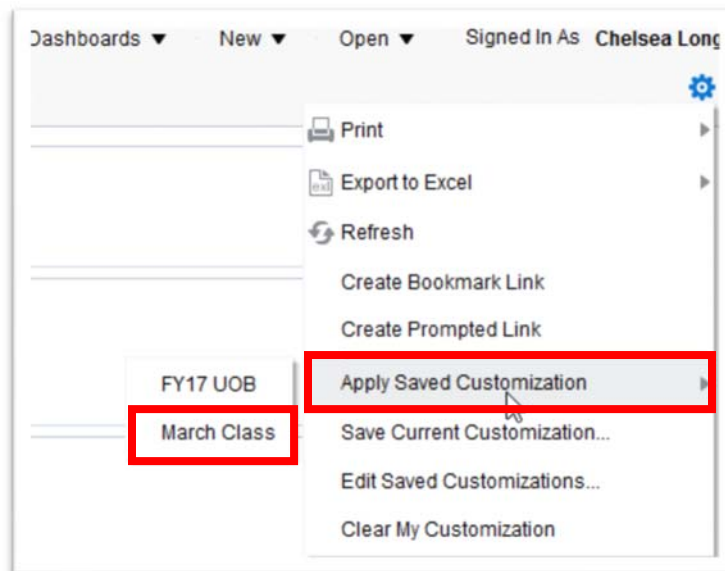
Dashboard: Budget Position Summary & Detail Report – Unrestricted Operating Budgets

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.

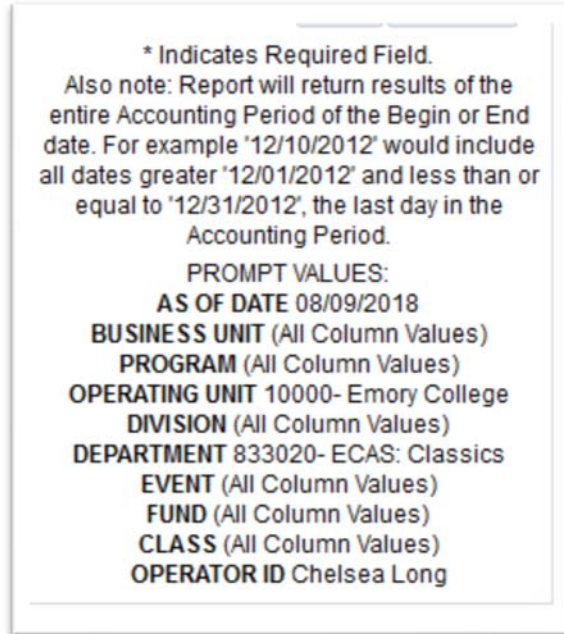
Department	Account Class	Account Group	Account Category	Account	Fund	Original Budget (\$)	Budget Revision (\$)	Budget	MTD Actual (\$)	FYTD Actual (\$)	LTD Encumbrance (\$)	Budget Variance (\$) Favorable / (Unfavorable)	% Used FYTD			
833029- ECAS Classica	Expenses	Salary & Fringe Benefits	Student Salaries	50200- EDG-Student Salaries	1002	1,950.00	16,227.00	16,177.00	0.00	0.00	0.00		18,177.00			
				50210- Sal - Ungrd Student FICA Exmpt	1002	0.00	0.00	0.00	0.00	24.00	0.00		(24.00)			
				50230- Sal - Grad Student FICA Exmpt	1002	0.00	0.00	0.00	0.00	16,140.34	0.00			(16,140.34)		
				50240- Sal - Work Study FICA Exmpt	1002	0.00	0.00	0.00	0.00	457.69	0.00			(457.69)		
				Student Salaries Total				1,950.00	16,227.00	16,177.00	0.00	16,622.03	0.00		1,554.97	91.45%
				Salary & Fringe Benefits Total				1,950.00	16,227.00	16,177.00	0.00	16,622.03	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	756.36	2,052.78	25.00		(2,078.68)	
						53210- Supplies - Computer Exp	1002	0.00	0.00	0.00	0.00	69.00	0.00		(69.00)	
						53600- Supplies - Other	1002	0.00	0.00	0.00	0.00	22.00	0.00		(22.00)	
						53800- Supplies - Noncap Equipment	1002	0.00	0.00	0.00	0.00	0.00	0.00		0.00	
						6100- Equipment - Capital	1002	0.00	0.00	0.00	0.00	0.00	0.00		(0.00)	



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.



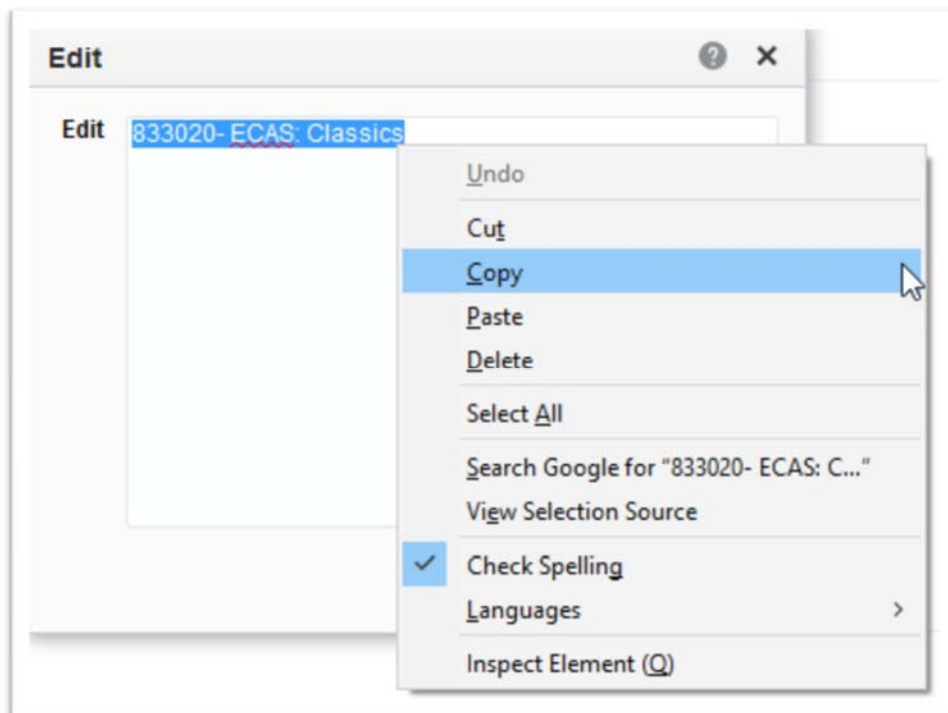
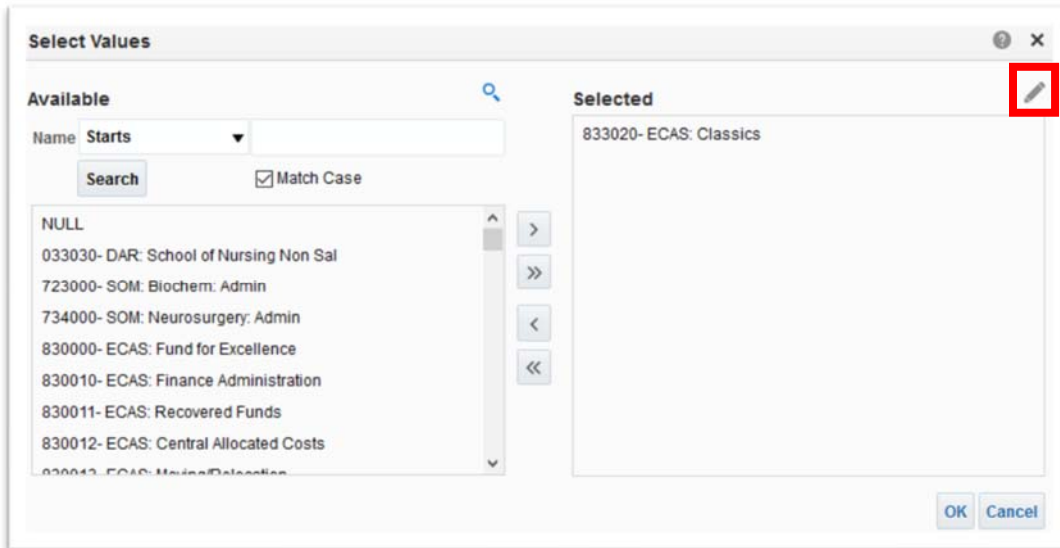
2. For any prompts that have multiple values, select the prompt drop-down menu and click "Search..."





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

WEB FORMS 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 (Unfavorable)	% Used FYTD
833020- ECAS Classics	Expenses	Salaries & Fringe Benefits	Student Salaries	9020- REG-Student Salaries	1000	1,900.00	16,217.00	16,177.00	0.00	0.00	0.00	0.00	16,177.00
				90210- Sub-Longest Student FICA Exempt	1000	0.00	0.00	0.00	0.00	24.00	0.00	(24.00)	
				90230- Sub-Open Student FICA Exempt	1000	0.00	0.00	0.00	0.00	16,149.34	0.00	(16,149.34)	
				90240- Sub-Open Study FICA Exempt	1000	0.00	0.00	0.00	0.00	497.66	0.00	(497.66)	
				Student Salaries Total		1,900.00	16,217.00	16,177.00	0.00	16,823.00	0.00	1,606.00	91.43%
	Salaries & Fringe Benefits Total		1,900.00	16,217.00	16,177.00	0.00	16,823.00	0.00	1,606.00	91.43%			
General operating expenses	Consulting Services			52100- Prof Fees- Honorariums	1000	0.00	0.00	0.00	859.00	1,238.07	0.00	(1,338.07)	
				52100- Prof Fees- Other	1000	0.00	0.00	0.00	52.55	235.05	0.00	(235.55)	
		Consulting Services Total		0.00	0.00	0.00	852.00	1,074.12	0.00	(2,674.12)			
	Supplies				53200- Supplies- Office Exp	1000	0.00	0.00	0.00	750.00	2,452.78	20.00	(2,672.00)
					53210- Supplies- Computer Exp	1000	0.00	0.00	0.00	0.00	18.00	0.00	(18.00)
					53000- Supplies- Other	1000	0.00	0.00	0.00	0.00	22.00	0.00	(22.00)
					53800- Supplies- Rental Equipment	1000	0.00	0.00	0.00	0.00	0.00	0.00	0.00
					53910- Supplies- Software	1000	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.