



Using Customizations in EBI

Overview

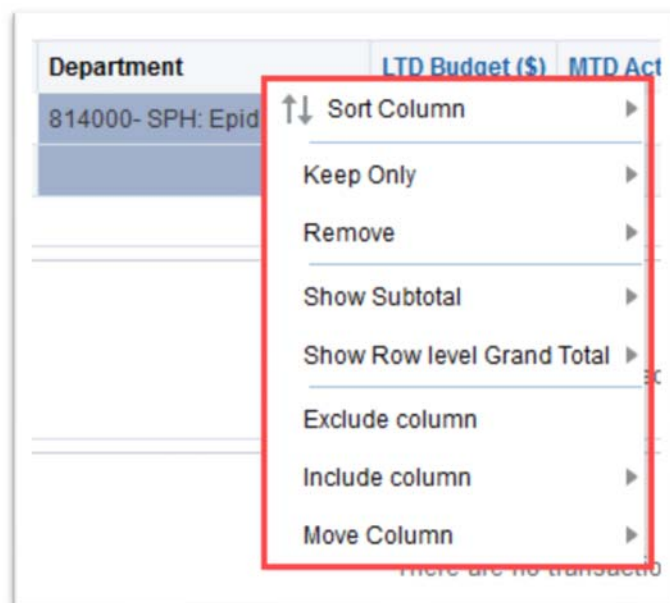
Dashboards are generically designed for wide-spread campus use. Users have the option to customize most dashboards to meet their individual reporting needs. These customizations are specific for the user that created them and are not available for others to view or use in EBI.

Saving a customization allows you to view the same data, prompt values, and layouts at a later date without having to repeat your selections each time.

TIP: Customizations are dashboard specific and can only be applied to the dashboard where they are created. You can create as many customizations as you need for any given dashboard.

Creating a Customization

1. Navigate to the Dashboard for which you would like to create a customization
2. Select the Prompt Values you would like to apply to the Dashboard
3. Click 'Apply' to run the Dashboard
4. Right click on any column header or data cell to view the available customization options.



5. Change the layout, columns, and subtotals to suit your needs.

Customization Options

Sort Column: this option allows you to sort the data in the selected column. Once you sort a column, you can add additional sorted columns by choosing Add Ascending/Descending Sort, similar to the Excel sort functionality (Sort by Column A, then by Column B). You can also Clear All Sorts.

TIP: All reports in EBI are default sorted by the left most column in the report.



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Keep Only: this allows you to keep only a specified item or group. If you choose Keep Only from the Column Header, you can choose to keep only transactions that meet a range of criteria. If you choose Keep Only from an individual cell of data, it will only keep transactions with that specific data.

Remove: this functions like Keep Only, except it will remove the specified data from the report.

CAUTION: Once you have used the Keep Only and Remove options you cannot undo those actions within this customization. To undo these actions, you will need to Clear the Customization and re-start your customization.

Show Subtotal: this will add or remove a subtotal line for the specified column header or cell value.

Show Row level Grand Total: this will add or remove a Grand Total line at the bottom of the report.

Exclude Column: this will hide the column where the action is performed. The column can be included again by choosing Include Column and selecting the column header name.

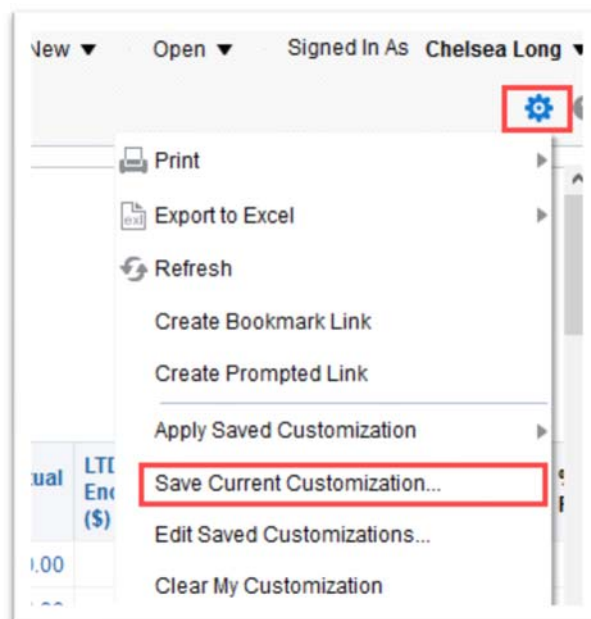
Include Column: this allows you to include additional data columns to the report.

Move Column: this allows you to move the column to various locations in the dashboard. This option only moves the column by a single increment left or right.

Saving a Customization

After creating your customization, you must save it in order to access it in the future.

1. Click the Page Options menu in the top right corner underneath your name. Click Save Current Customization.





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2. Name your customization.

TIP: Choose a name that is meaningful to you! The customization and customization name are only visible to you, so make sure the name is useful for you and helps you remember the purpose of the customization.

Save Current Customization ? X

Name

Save for Me

Others

Make this my default for this page

3. You can choose to make a customization the default view for the Dashboard. This means when you open the Dashboard, your default customization will run automatically.

Save Current Customization ? X

Name

Save for Me

Others

Make this my default for this page

4. Click 'OK'. Your customization has now been saved.



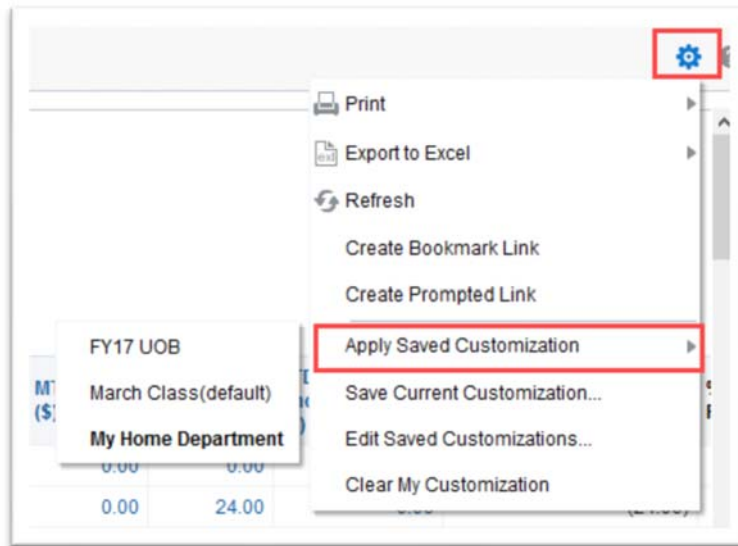
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Viewing and Editing Saved Customizations

All saved Customizations will appear in the Page Options menu of the dashboard where they were created. They can be **viewed** either by clicking Apply Saved Customization or Edit Saved Customizations.

Apply Saved Customization gives you the option to apply any of your saved customizations to the dashboard.

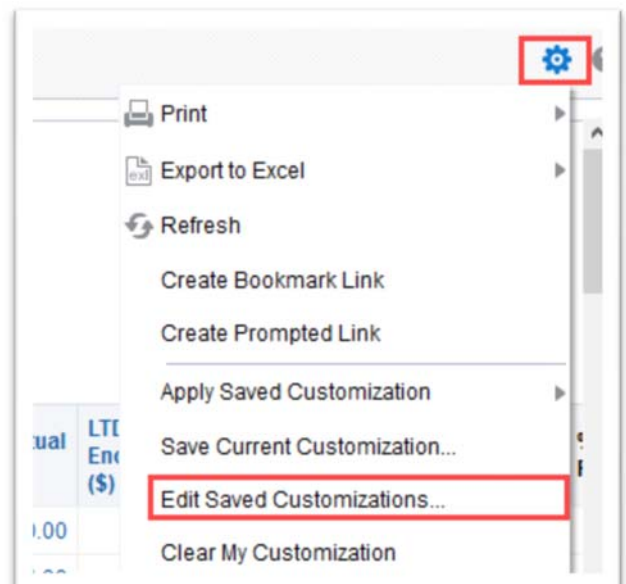
TIP: If you currently have a customization applied to the dashboard, that customization name will be bold. If you have a default customization saved, the word (default) will appear after the customization name.



TIP: Multiple Customizations can be saved for the same Dashboard, but each must have a unique name, even if it is for a separate dashboard page.

You can **Edit your Customization** at any time by selecting Edit Saved Customizations. Here you can:

- Rename customizations
- Change which customization to use as your default
- Delete Customizations

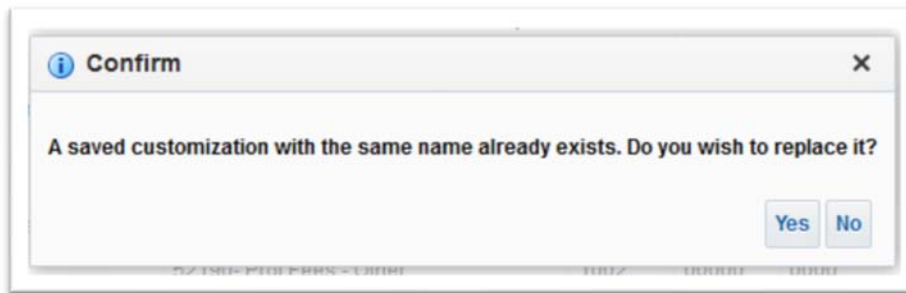




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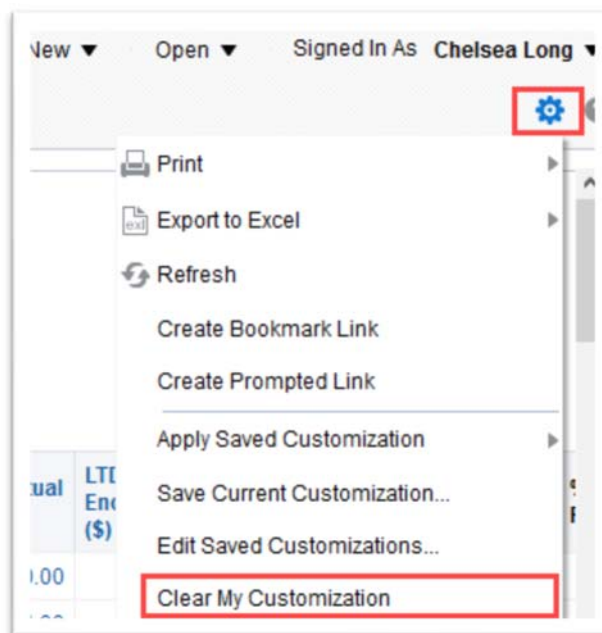
If you want to **modify the layout or prompts for an existing customization**:

1. Apply the Saved Customization that you want to change to the dashboard.
2. Make the necessary changes.
3. Select the Page Options menu and click Save Current Customization.
4. In the Name field, enter the same name as the old customization.
5. A message will appear asking if you want to replace the old one. Click Yes to save the new customization over the old one.



Clearing a Customization

If you want to return the Dashboard to its default view, select the Clear My Customization option from the Page Options menu.



TIP: Clearing the customization does not delete the customization, it simply resets the report to the default view. The customization can be re-applied to the dashboard again in the future.

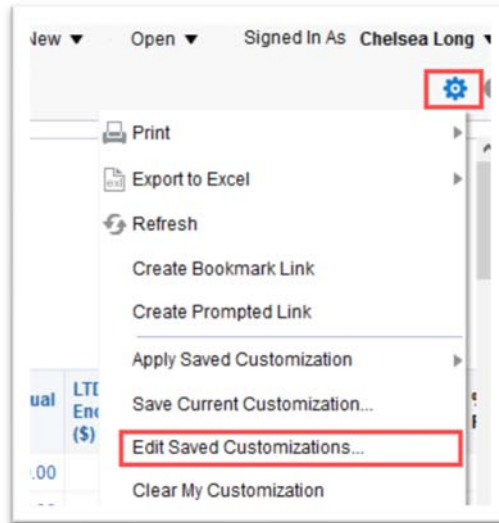


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Deleting a Customization

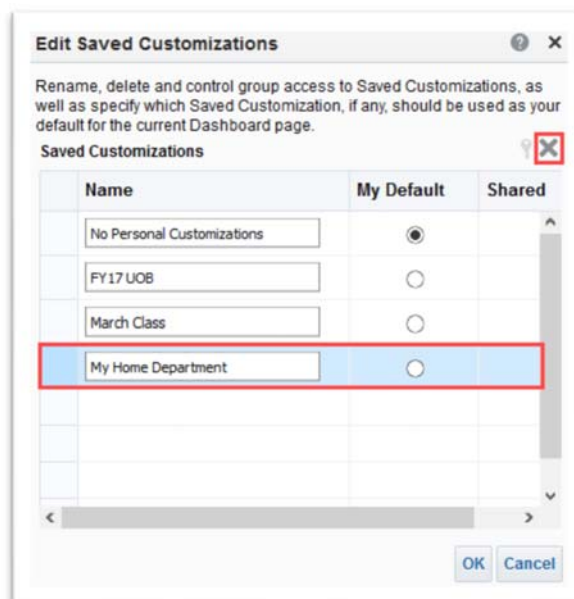
If a customization is no longer useful, you can choose to delete it from your customization list.

1. Click on the Page Options menu again and select Edit Saved Customizations



2. Click the customization that you would like to delete, and click the X.

CAUTION: Be sure you are ready to delete the customization! Clicking the X will permanently delete the customization and it cannot be restored. You will not see a message asking you to confirm you want to delete the customization.



TIP: If the customization is set as your default customization, it will automatically select No Personal Customizations as your default view after you delete the customization.



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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.