Gaining Insight from Report Data

**Drilling Down**
1. Click on any blue link to see details

**Slicing**
2. View by one Worktag
   a. Hover over any blue number entry until triangle appears
   b. Click on triangle and select desired “View by” option/worktag

3. View by two Worktags
   a. To add a second View by worktag, click drop-down arrow in “and then by”, and select desired option/worktag
   b. Click Refresh

**UR Financials Advanced Reporting Functionality**

**Scheduling a Report**

**Schedule to run in the future**
1. Either search for or use Favorites to select Schedule a Report
2. Click prompt icon in Report and select My Saved Filters
   Note: Filters must be saved ahead of time to schedule a report using Saved Filters
3. Select the report
4. Select the name of the Saved Filter
5. Click drop-down arrow in Run Frequency, and select desired run frequency
6. Click OK
7. Unless Run Frequency = Run Now, click Schedule tab
   a. To run a report once in the future, enter start/time information and click OK
   b. To run a recurring report, enter recurrence information and click OK
8. Click Output tab
   a. Change default settings for output type, if desired
9. Click OK

**Schedule to run in the background**
When reports are large and need more time to run, you will get a pop-up notification so you can keep working while the report is running in the background

1. Click Notify Me Later on pop-up notification
2. In Request Name, delete My Report and type a name for report you are scheduling
   Note: Renaming the report is optional, but may help organize your reports
3. Click drop-down arrow next to Format and select a format
4. Click OK
Running a Scheduled Future Processes Report

1. Either search for or use Favorites to select **Scheduled Future Processes**

2. To see only processes you have scheduled:
   a. Click **Filter** icon
   b. Click **search box** under **Owned By** and enter your User Name

To edit scheduled processes

1. Repeat step 1
2. In Request Name column, hover cursor over the request name of interest, then click **Related Actions icon**
3. In Available Actions, hover cursor over **Scheduled Future Processes**
4. Click **Edit**
   a. In **Request Name**, edit name, if desired
   b. Make any other necessary edits using the appropriate tab
5. When edits are completed, click **OK**

To delete scheduled processes

1. Repeat steps 1 – 3
2. Click **Delete**
3. Click **OK**

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Running Process Monitor

**Note:** Run Process Monitor to get information on processes that are running in the background

1. Either search for or use Favorites to select **Process Monitor**

2. Select the appropriate prompt filters
   a. In **From Date and Time**, enter starting from date and time
   b. In **To Date and Time**, enter to date and time
   c. In **Process Types** field:
      i. Click **X** by Batch to remove
      ii. Click **X** by Integration to remove
      iii. Click **X** by Job to remove
      iv. Click **X** by Web Service to remove

3. Click **OK**

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3. Click **OK**