

Insight Quick Reference | Create a Managerial Report

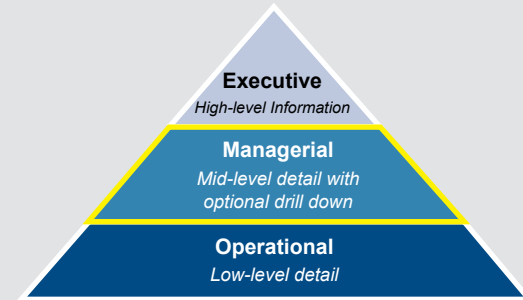
Create a managerial report to:

- 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:

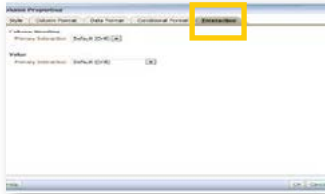
Awards, Leave Data and Usage, Leave Lump Sum Pay Liability, Overtime, Personnel Action Requests (PAR) by Nature of Action (NOA) Codes Summary, Retirement Eligibility, Time Contribution to Union Activities

Insight provides three levels of report detail:

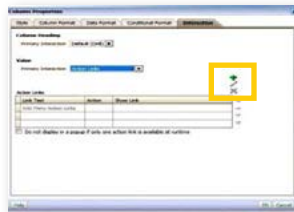


1 Create an Action Link

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.



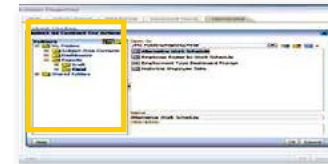
4. Use the Primary Interaction drop-down menu to change the **Primary Interaction** to Action Links.
5. Click the **New** icon to open the New Action Link window.



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



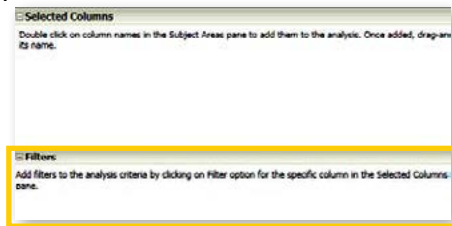
7. Navigate to the **Folders** pane to select the existing report from the Catalog targeted for the drill-down. Click OK.



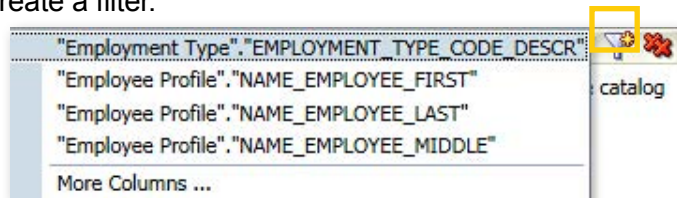
8. View the Create New Action window and click **OK**.
9. View the New Action Link window which has updated with the report selected in the previous step. Click **OK**.
10. Click the **Do not display in a popup if only one action link is available at runtime** check box from the Interaction tab. Click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

2 Add an Is Prompted Filter

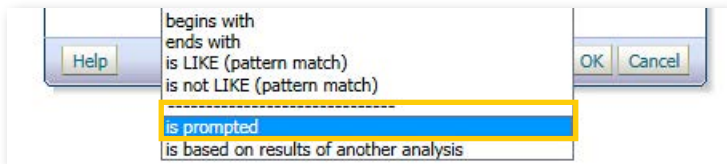
1. Navigate to the **Criteria** tab of the managerial report and locate the Filters pane.



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.

Intermittent	Algün	Halit	H	
	Amelia	Eisey		
	Borbosa	Maria	M	
	Cynthia	Redwine	S	
	Li	Liang	L	
	Lisa	Todd	J	
	Mabunda	Lorna	J	
	Matthew	Allen	M	
	Michael	Giordano	R	
	Scott	Boerner	PEREZ	
	Part-Time	Abdolalipour	Macumeh	M
		Allen	Mark	
		Amy	Hays	
		Antila	Dale	
		Antoszewski	Patrick	T
		Berniel	Michael	Y

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

Not Under A Compressed Work Schedule	Allen	Mark		Part-Time
	Angela	Childrey		Part-Time
	Anita	Rodgers	E	Part-Time
	Ansari	Habiburrahma		Part-Time
	Antila	Dale		Part-Time
	Antoszewski	Patrick	T	Part-Time
	Barbosa	Maria	D	Part-Time
	Barrett	Watten	L	Part-Time
	Bepler	Gerold	D	Part-Time
	Berman	Robert	C	Part-Time
	Bernadette	Bruderick	B	Part-Time
	Bhalla	Deepak		Part-Time