

## 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:

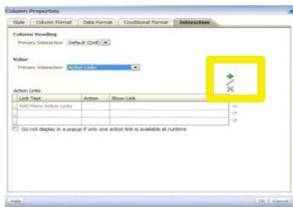


### 1 Create an Action Link

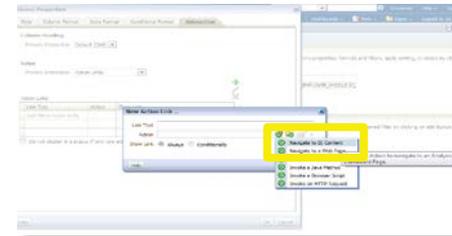
1. Navigate to the **Selected Columns** pane from the **Criteria** tab.
2. Click the **Edit** icon for the targeted data element and select **Column Properties** from the drop-down menu.
3. Navigate to the **Interaction** tab.



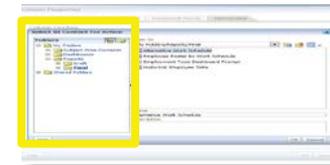
4. Use the Primary Interaction drop-down menu to change the **Primary Interaction** to Action Links.
5. Click the **New** icon to open the New Action Link window.



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



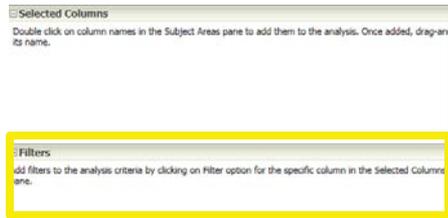
7. Navigate to the **Folders** pane to select the existing report from the Catalog targeted for the drill-down. Click OK.



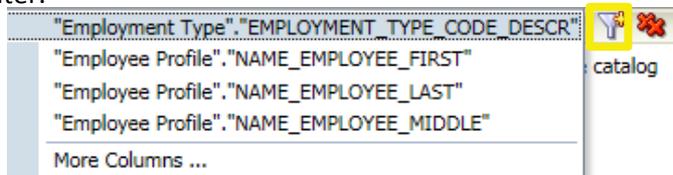
8. View the Create New Action window and click **OK**.
9. View the New Action Link window which has updated with the report selected in the previous step. Click **OK**.
10. Click the **Do not display in a popup if only one action link is available at runtime** check box from the Interaction tab. Click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

## 2 Add an Is Prompted Filter

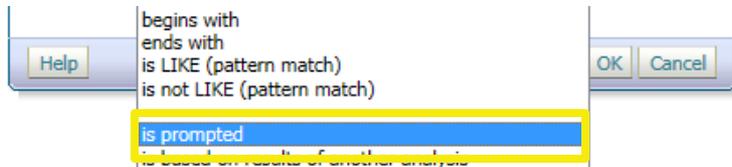
1. Navigate to the **Criteria** tab of the managerial report and locate the **Filters** pane.



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	Akgun	Halit	H
	Amelia	Elsey	
	Barbosa	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	Masumeh	M
	Allen	Mark	
	Amy	Hays	
	Antila	Dale	
	Antoszewski	Patrick	T
	Beriel	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	Broderick	B	Part-Time
	Bhalla	Deepak		Part-Time