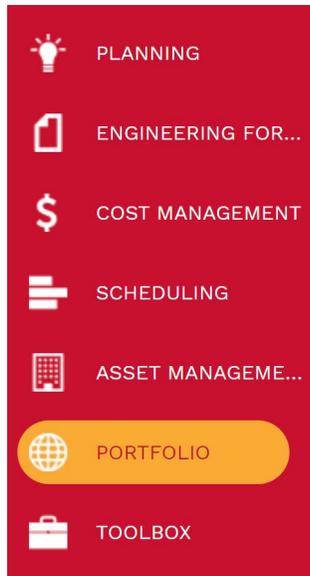


Accessing BI Reports

Overview: PM Web has numerous prebuilt reports available to users to use for data analysis.

Reference: n/a

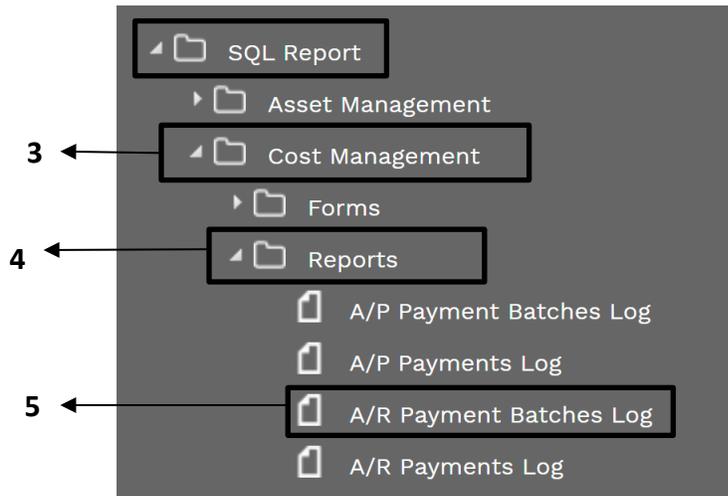
1- Click on **Portfolio** from the buttons on the left.



2- **Reports**, select **BI Reporting Center**.



- 3- Select the type of **SQL report** from the Report Manager. Example: Cost Management
- 4- Select the **Record type**. Example: Reports
- 5- Select the **Report type**. Example: Budget Detail Worksheet.



- 6- Select **Printing Setup** in the header to create a reoccurring report and click on save button. Do nothing if not a reoccurring report.

GENERAL
PRINTING SETUP

Report SCHEDULE

Associate With Record T... Schedule This Report

Make This the Default Report For the Selected Record Type

REPORT PARAMETERS

NAME	PMWEB FIELD	DEFAULT
Program	<input type="text" value="Program ID"/>	<input type="text"/>
ReportTitle	<input type="text" value="(Use Default)"/>	<input type="text" value="A/R Payment Ba"/>
Project	<input type="text" value="Project ID"/>	<input type="text"/>
Groupby	<input type="text" value="(Use Default)"/>	<input type="text" value="Project"/>
Currency	<input type="text" value="(Use Default)"/>	<input type="text"/>

SAVE

↓

6

7- Re-Select the **General** tab.

8- Select the **Preview** button.

GENERAL PRINTING SETUP

Report Name* A/R Payment Batches Log

Report Type SQL Report

Folder Path SQL Report\Cost Management\Reports\

Is System

Server URL* http://localhost/ReportServer

Path* /PMWebDev/PMWebReports/Cost Manag

PROJECTS

- ~508 Structural Investigation
- ~1000298 -121Brazos Hall 3rd Floor Card Reader Room 313
- ~1000325 - 568 ADA Compliant Room Signage
- ~101 Create Banquette Storage & Storage Unit
- 101 Interior Finishes and Refurbishment
- 101 Wortham House Pool

PREVIEW

8

9- Select the **View Report** on the top right of the screen.

10- Select the disk arrow button  in the middle of the page

11- Select the document type for the report.

Program CCS, CCS - Research/Lab, CCS Project B Report Title A/P Payments Log

Project None, Test Project for Marnie Group by Project

Currency USD - Dollars (USA)

VIEW REPORT

10

9

12- Process Complete.