
Running Reports using SAS Web Report Studio

Introduction

This document explains the key features of the SAS Web Report Studio (Web Report Studio) reporting tool. It is not specific to any one report. There is a separate, supplemental document for each Web Report Studio report that explains that report's purpose and filters.

A complete list of reports can be found on the **Finance Reporting Reference Guide** and the **HR/Payroll Reference Guide**. The links to these documents are below:

- <http://ccinfo.unc.edu/resource-docs/finance-reporting-reference-guide/>
- <http://ccinfo.unc.edu/tools/hr-reporting/>

Sections in this Document

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Accessing Web Report Studio Reports

Web Report Studio reports are located in different places in InfoPorte, depending on the report's content. Always refer to the reporting guides for the navigation paths for each report. The navigation paths to some commonly used Web Report Studio reports are below.

Example 1: OSR Campus Reports

Several Web Report Studio reports related to grants are located at this navigation path: **Finance > Dept Accounting > Grants > OSR Campus Reports**

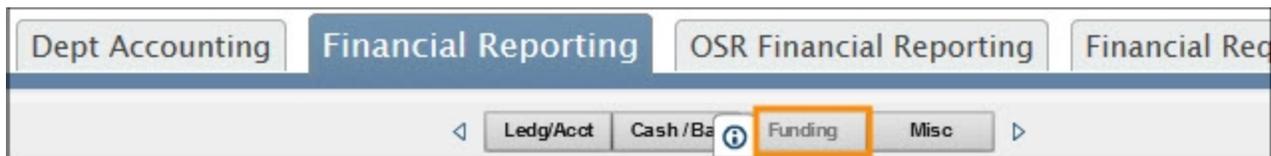


Click the link to open the report.



Example 2: Payroll Accounting Report

The Payroll Accounting report is located at: **Finance > Financial Reporting > Funding**



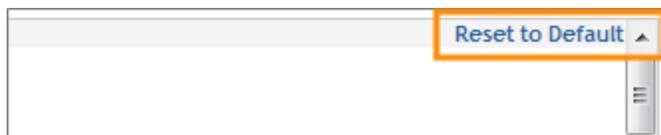
Click the link to open the report.



Running Web Report Studio Reports

Reset to Default

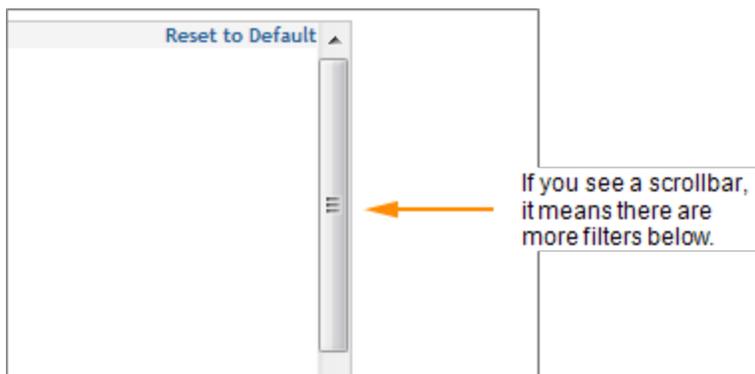
It is important to get in the habit of clicking the **Reset to Default** link at the top right corner of the report each time you run a Web Report Studio report. Otherwise, the report "remembers" the previous value you entered.



Search Filters

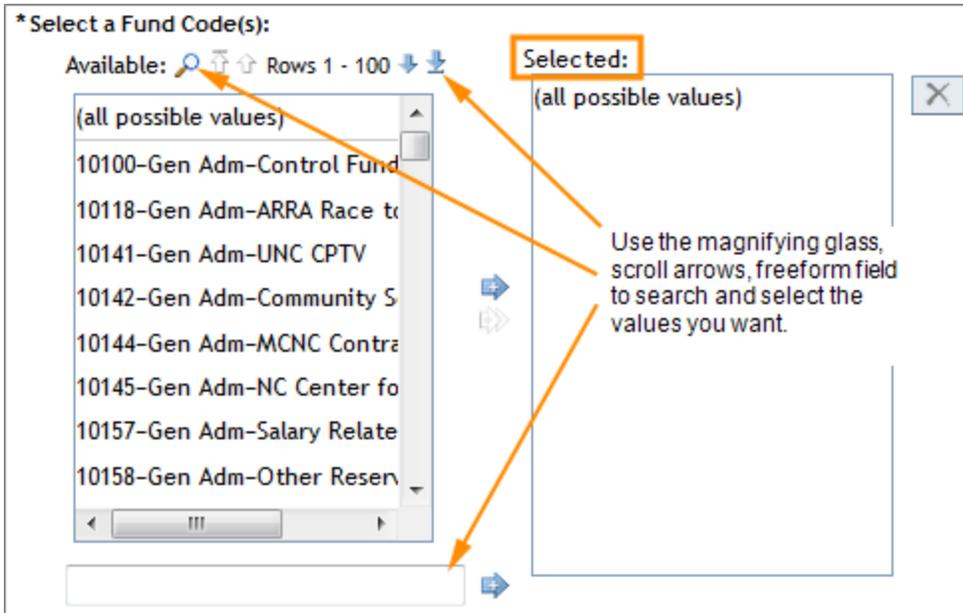
Most Web Report Studio reports have two or more filters. The home page of a report can typically only display two filters at a time.

Get in the habit of scrolling down to make sure you see all the available filters. You only need to complete the filters you want to run the report by.



Search or Enter Values

Below is an example of a typical Web Report Studio report filter. For each filter, you need to move the values you want to the **Selected** section. You have three options for searching for values: the magnifying glass, scroll arrows, and the freeform field.



Using the Magnifying Glass

Follow these steps to use the magnifying glass to search and select values.

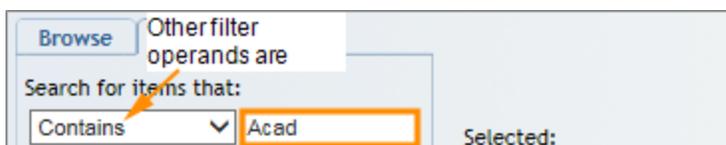
1. Click the magnifying glass.



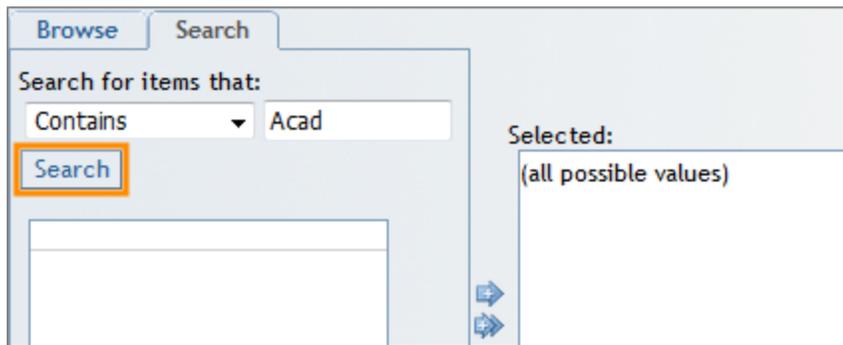
Results: The search window opens. There are two tabs at the top, Browse and Search. The default is the **Search** tab, which allows you to search by specific values. The **Browse** tab allows you to scroll through all the values.

2. Enter an alpha or numeric value in the search field.

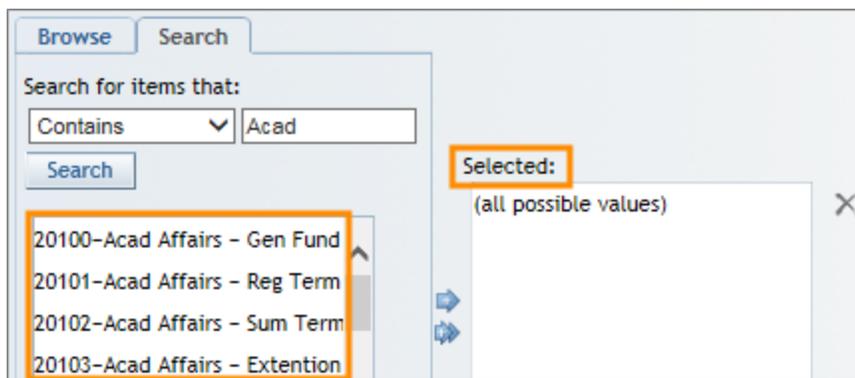
Note: You can change the filter operand from *Contains* to *Exactly matches*, *Starts with*, *Ends with*, and *Matches pattern*.



3. Click the **Search** button.



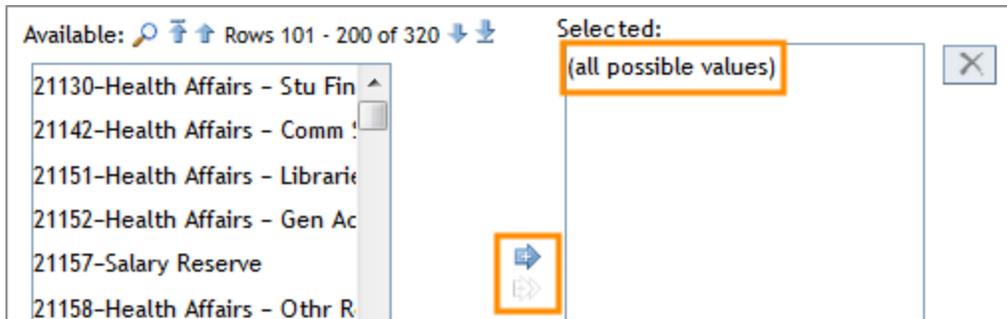
Result: The values appear in the white space below the Search button. This is the **Available** section. You need to move the values you want to the **Selected** section.



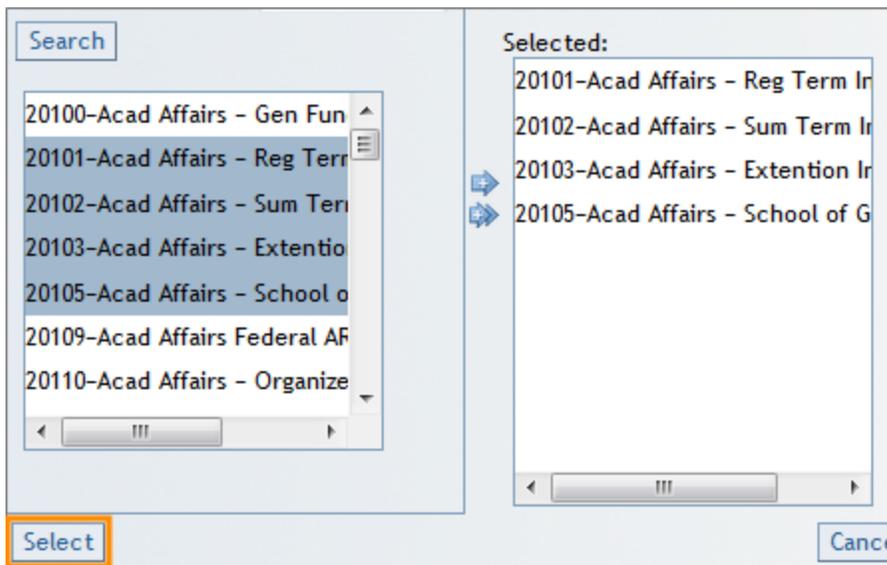
4. Use one of the options below to move the values you want to the **Selected** section.

- All possible values. Most of the time, "all possible values" appears by default in the Selected section. If this is the case, and you want to show all values, you don't need to do anything. Sometimes, however, "all possible values" only appears in the Available section, in which case you need to select it and click the single arrow to move it to the Selected section.
- The double arrow. The double arrow is another way to select all values. It is enabled on filters with a smaller number of values. A filter either has the "all possible values" option or the double arrow option, but not both.
- Selecting a single value. To select a single value, click the value and then click the arrow in the space between the Available and Selected sections.
- Selecting multiple values in a consecutive range. To select multiple values in a consecutive range, press and hold the **Shift** key, select the values you want, and click the single arrow.

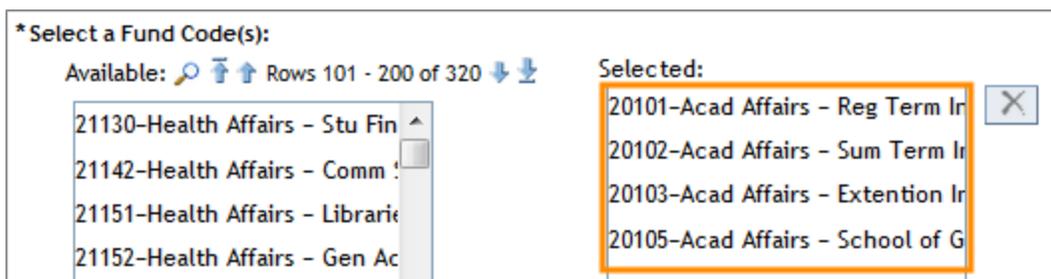
- Selecting multiple values **not** in a consecutive range. To select multiple values **not** in a consecutive range, press and hold the **Ctrl** key, select the values you want, and click the single arrow.



5. Once you have moved the values you want to the Selected section, click the **Select** button.



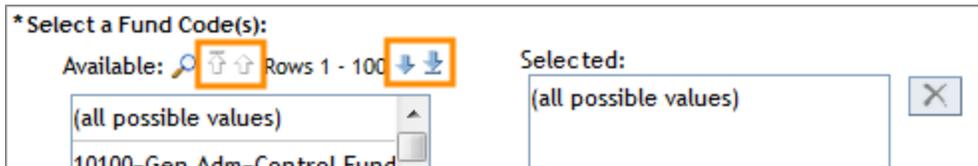
Result: The system displays the values in the filter.



Using the Scroll Arrows

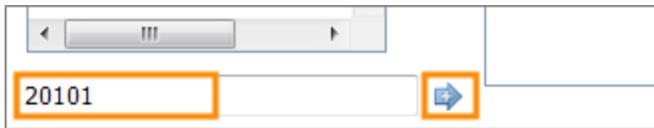
Search fields with many values have single and double arrows that allow you to scroll through the values quickly.

- The single arrows scroll up or down in increments of 100.
- The double arrows scroll to the first or last row.
- When you find a value you want, follow the guidelines from the Using the Magnifying Glass section to select and move the value to the **Selected** section.



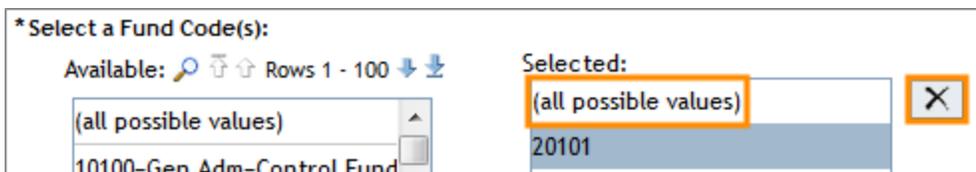
Using the Freeform Field

1. To use the freeform field, enter the value you want in the field.
2. With the value selected, click the single arrow.



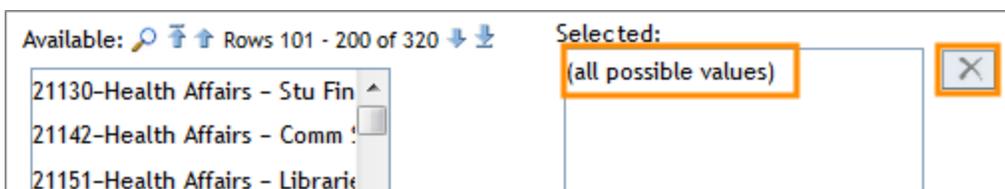
Result: The system displays the value in the **Selected** field.

Caution! The "all possible values" entry remains even after you select a value from the freeform field. You need to manually remove it by selecting it and clicking the **X** button.



Removing Values

To remove a value from the Selected section, highlight the value and click the X icon.



Viewing the Report

When you have entered the report filters you want, click the **View Report** button.



Results: The system displays the report.

Working with the Report Output

Below is an example of the output of a Web Report Studio report.

	Contract ▲	Contract Start Date	Contract End Date	Contract Status	Bill Type ID	Bill Cycle ID	Award Milestone Type	Milestone C
1	A00-0001-001	01-JUL-2006	30-JUN-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
2	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
3	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
4	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
5	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
6	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
7	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
8	A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC	LOC	FINAN	FROE RPT
9	A00-0003-001	16-MAR-2006	31-AUG-2010	CLOSED	LOC	LOC		
10	A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED	LOC	LOC	FINAN	FROE RPT
11	A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED	LOC	LOC	FINAN	FROE RPT
12	A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED	LOC	LOC	FINAN	FROE RPT
13	A00-0005-001	01-MAY-2006	31-MAR-2011	CLOSED	LOC	LOC	FINAN	FROE RPT
14	A00-0005-001	01-MAY-2006	31-MAR-2011	CLOSED	LOC	LOC	FINAN	FROE RPT
15	A00-0005-001	01-MAY-2006	31-MAR-2011	CLOSED	LOC	LOC	FINAN	FROE RPT

Column Headers

Right click on any column header to display options for sorting, moving columns, and aligning the data.

Contract ▲	Contract Start Date	Contract End Date	Contract S	atus	Bill Type ID	Bill Cycle ID	Aw
A00-0001-001	01-JUL-2006	30-JUN-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED				FIN
A00-0003-001	16-MAR-2006	31-AUG-2010	CLOSED				FIN
A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED				FIN
A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED				FIN
A00-0005-001	01-MAY-2006	31-MAR-2011	CLOSED		LOC	LOC	FIN

- Sort Ascending
- Sort Descending
- Remove All Sorting
- Move to Left
- Move to Right
- Align Left
- Align Right
- Align Center
- Hide Contract Status

Edit Menu

Right click in any cell of the report to open a menu with options for arranging and analyzing the data. The table below defines the options in the menu.

In this field:	Do the following:
Assign Data	Allows you to change the order of the columns, or hide a column. After you click on Assign Data, select the column you want to move, and use the Move Item button to move the item up or down.
Sort Priority	Allows you to select the columns to sort the data by.
Total	Sums columns with numerical values. The sum appears in a Total row at the bottom.
Percent of Total	Shows the percent of a value to the total of the values in that column. The percent shows in a new column. When adding the Percent of Total, the "Label" field is what you want the column header to be.
Filter and Rank	The rank option is not used for the reports currently available in Web Report Studio. To filter, after you select the Filter and Rank option, select the field you want to filter by.
Conditional Highlighting	Allows you to color-code cells and text. After clicking Conditional Highlighting, select the New button and select cells and colors. When you click OK, the report appears with the highlights you entered.
Export Table	This exports the data view to Excel. Note! Clicking File > Export from the top toolbar in the report exports the full data set to Excel, not just the view in front of you.
Rotate Table	Switches the column headers to row headers, and vice versa.
Data Source Details	Field details of the page.
Properties	Format details of the report.



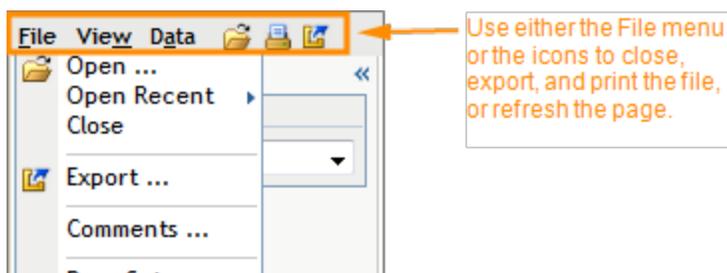
Contract ▲	Contract Start Date	Contract End Date	Contract Status	Bill Type ID	Bill Cycle ID	Award Milestone
A00-0001-001	01-JUL-2006	30-JUN-2007	CLOSED	LOC	LOC	FINAN
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0002-001	01-APR-2006	31-MAR-2007	CLOSED	LOC		
A00-0003-001	15-MAR-2006	31-AUG-2010	CLOSED	LOC		
A00-0004-001			CLOSED	LOC		
A00-0004-001			CLOSED	LOC		
A00-0004-001	01-MAR-2006	31-JAN-2012	CLOSED	LOC		

Right click in any cell to see edit options for the entire spreadsheet.

Common Web Report Studio Commands

The top left toolbar in Web Report Studio reports have common commands for working with the file. The table below defines these commands.

In this field:	Do the following:
File	<p>The File menu contains the following options:</p> <ul style="list-style-type: none"> • Open - allows you to open another report in Web Report Studio. • Open Recent - allows you to open a report in Web Report Studio that you've recently had open. • Close - allows you to close the report • Export - allows you to export the entire data set to Excel. <ul style="list-style-type: none"> ◦ Note: This is different from exporting just a particular view of the report, which you do by right clicking in a report output and clicking Export. • Comments is not used. • Page Setup - allows you to manipulate the page layout • Print - allows you to print the report • Manage Files is not used. • Properties - shows the report properties
View	<p>The View menu contains the following options:</p> <ul style="list-style-type: none"> • Section - not used • Applied Filters - you can remove or select the filters you used to run this instance of the report • Data Panel - hides or disples the left panel • Report Style - contains various display options
Data > Refresh Data	Allows you to refresh the data and run a new instance of the report.
Open icon	Equivalent to the File > Open menu option.
Print icon	Equivalent to the File > Print menu option.
Export icon	Equivalent to the File > Export menu option.



Report Views

In the top right corner, there is a ratio, such as 1/1. This indicates how many pre-formatted views are available for the report. It is equivalent to the number of options in the table of contents to select.

