Running SAS VA Reports

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Purpose of these Reports

SAS Visual Analytics (SAS VA) is a reporting tool used for both finance and human resource reports. The unique feature of SAS VA reports is that the search pages update automatically each time you select a new filter. There is no search button.

For finance reports, access to most SAS VA reports is more restricted than the Ledger Rollup reports. For human resource reports, people with the appropriate human resource role have access to the human resource reports.

This document does not address a specific report but rather provides the navigational features of the SAS VA reporting tool, including working with the report output. There is a separate document for each SAS VA report that explains that report's unique purpose, filters, and output.

A complete list of finance reports can be found at https://ccinfo.unc.edu/featured-resources/quick-reference-guide-to-finance-reports/. A complete list of finance reports can be found at https://ccinfo.unc.edu/featured-resources/hr-reporting/.
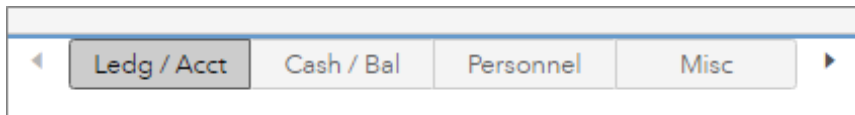
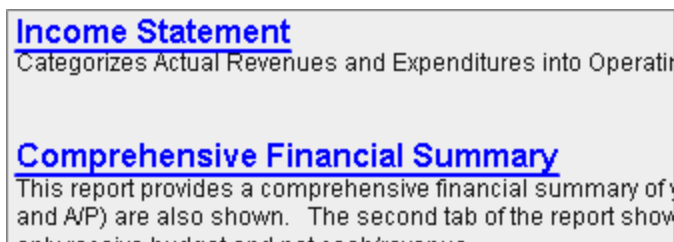## Accessing SAS VA Reports

Finance Reports

Most finance SAS VA reports are located under the Finance > Financial Reporting tab.

Under the **Financial Reporting** tab, the reports are organized under four tabs. Select the tab that contains your report.
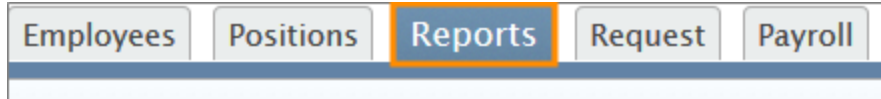

Under the tab you selected, click the link for the report you want.
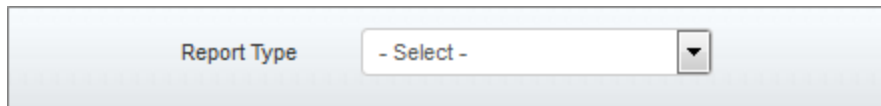
HR Reports

Most HR SAS VA reports are located under the **HR > Reports** tab.

Under the Reports tab, select the report you want from the Report Type menu.


General Tips

Below are the key features of SAS VA reports.

Tabs that Drive Filter Options

Some of the SAS reports, primarily the HR reports, have tabs across the top that determine the filters that display on the home page. The first step when running a report with tabs across the top is to select values from these tabs. As you make your selections, the filters on the rest of the report change.

If a SAS VA report does not have tabs across the top, then all the filters of the report are shown when you first open the report.

The screen below is an example of a report with tabs across the top.
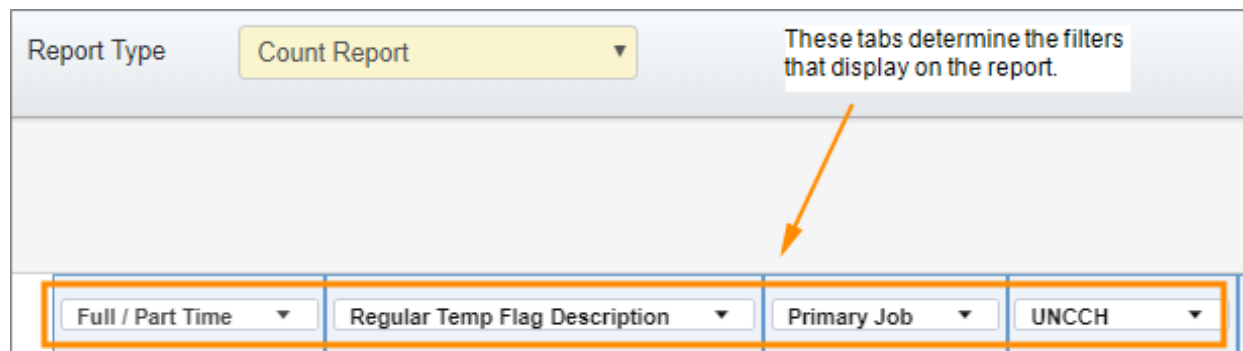
Tabs that Drive Level of Detail

Most SAS VA reports have several views that show different levels of detail. The first view is usually the summary view. You can start from the summary view and drill down to a more detail view, or search directly from a detail view. However, be aware that if you enter

search values from the summary view tab and then click to a detail view, the search filters do not carry over. If you click back to the summary view, your original values still appear.
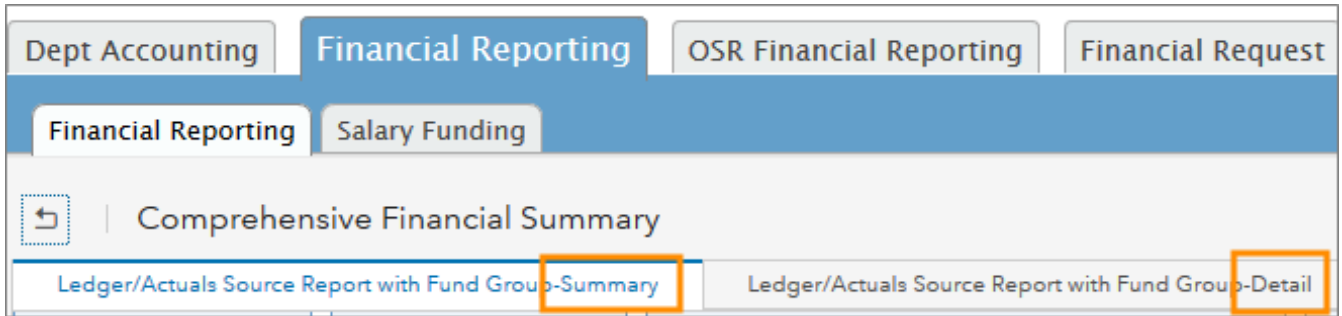

Report Filters

Each SAS VA report contains filters unique to the report. The filters for most SAS VA finance reports are chartfields. The filters for most SAS VA human resource reports are related to employee and positions.

It's good practice to check each filter to make sure only the filters you want are selected. Also, check to make sure the default business unit and fiscal year are what you want.

With SAS VA reports, there is no search button. Each time you enter a filter, the system automatically recalculates the search results. The system displays a "Loading" message when it is recalculating.
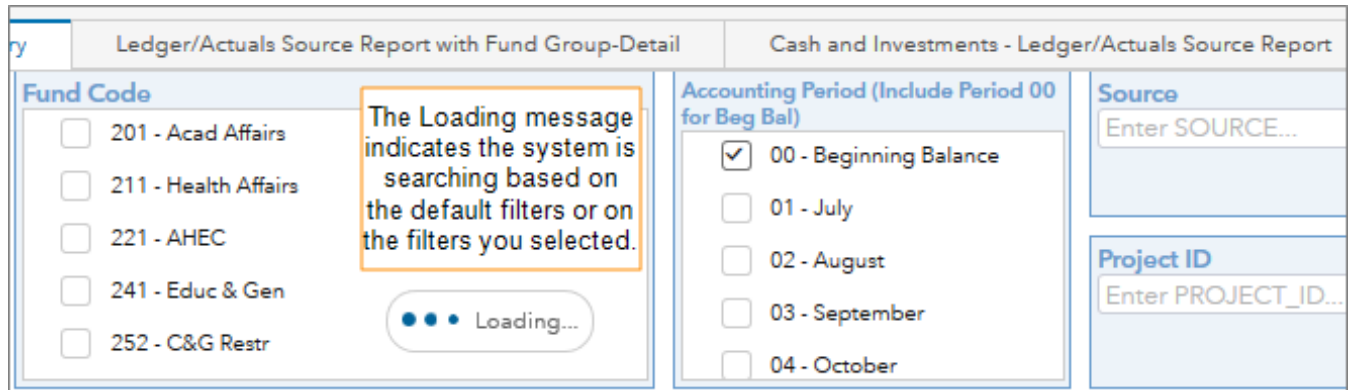
Special Note on the Department Filter

The department filter allows you to select a level in the department hierarchy, from Level 3, which is the highest, to Department, which is the actual department ID. For example, if you selected Arts and Sciences from Level 3, the report results show all departments in the College of Arts and Sciences.

If you are searching by department, use the tabs and arrows in the Department filter to select the level you want.
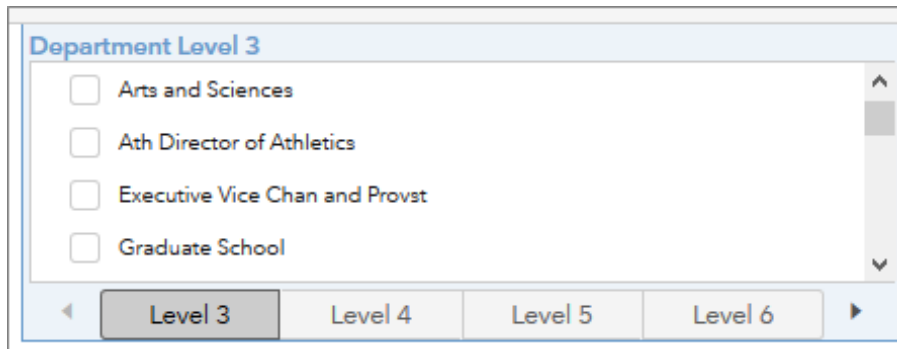
What Reports Show

Many SAS VA reports show results at one level of detail, and provide the ability to drill down to greater detail. There are two ways of moving from the summary to the detail view. The first is by double-clicking on the rows where you want more detail. The second way is by using the tabs across the top of the report to open a more detailed view.

When you double click a row, the system opens a view of the report with detail for the row you selected.

Ledger - Summary Level

Source Code ▲	Source Description ▲	Fund Group ▲	Sales and Svcs Rev - 44XXXX	Tfr Rev - 48XXXX
Total			$19,485.00	$214,776.56
12001	AA-Appropriation/Central Rcts	201	$0.00	$0.00
12002	Academic Affairs Dist Learning	201	$0.00	$0.00
12003	Academic Affairs Educ & T		$0.00	$0.00
12101	KFBS MBA		$0.00	$0.00
12502	Music-Private Instr		$642.00	$2,378.79

Double-click a row in the search results ... and the system opens a new screen showing the details.

Ledger - Detail Level

st Code 3 & Description	Claim on Cash	Cap Improvement Cash	Petty C...	Imprest Cash	E
	$0.00	$0.00	$0.00	$0.00	
	$8,977.00	$0.00	$0.00	$0.00	
	$0.00	$0.00	$0.00	$0.00	
	$0.00	$0.00	$0.00	$0.00	
	($33,109.45)	$0.00	$0.00	$0.00	
	($730,762.94)	$0.00	$0.00	$0.00	

From the detail screen, you can return to the previous screen by clicking the back button in the upper left corner.
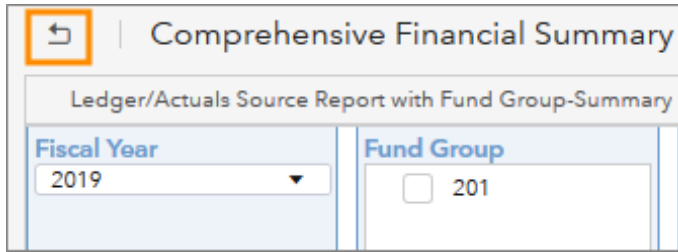
Sorting Report Results

To sort the data in a column, do this:

1. Click a column heading to display an arrow.

Result: The system displays an Up arrow by the heading and sorts the data in ascending order. It may take a few seconds for the data to be sorted.

2. Click the arrow to sort the data in descending order.

Result: The system displays a Down arrow and reverses the order of the data.

Maximizing the Search Results Screen

1. Click on any row in the search results:

ACCOUNT	ACCT_AND_DESC	DEPT_AND_DESC	PRO.
211230	211230-Payroll Tax-Addition M...	318600-Exercise and Sport Sci...	-
111305	111305-Cash-State Check Dis...	318600-Exercise and Sport Sci...	-
111099	111099-Cash-Intraunit	318600-Exercise and Sport Sci...	-
111002	111002-Cash-Institutional Trus...	318600-Exercise and Sport Sci...	-
211220	211220-Payroll Tax-FICA	318600-Exercise and Sport Sci...	-

Result: The system displays a double arrow in the upper right-hand corner of the search results.
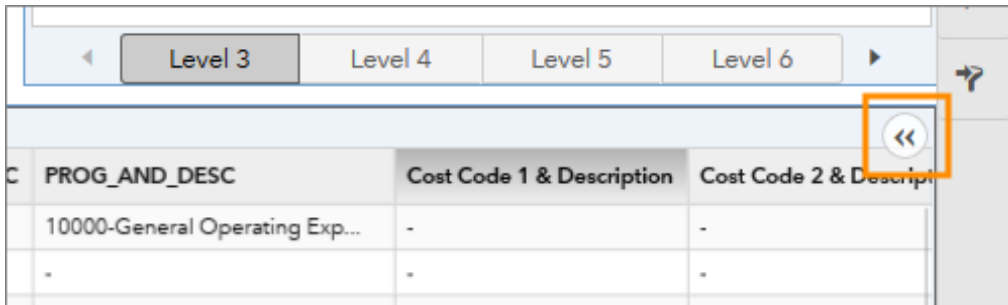
2. Click the double arrow and then click the Maximize View button.
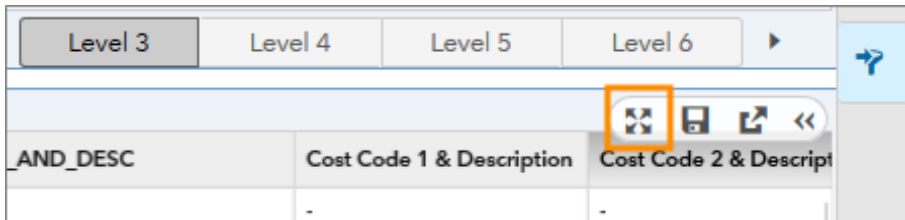
Result: The search results are maximized and the filters are hidden.

3. To return to the original view, click the Exit Maximized View button.
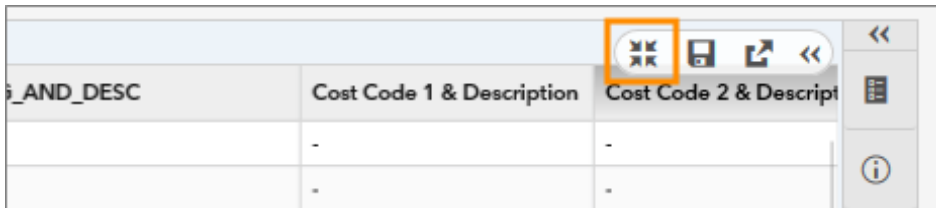
Exporting to Excel

Export search results to Excel to save a report. You can export either summary or detail views of search results.
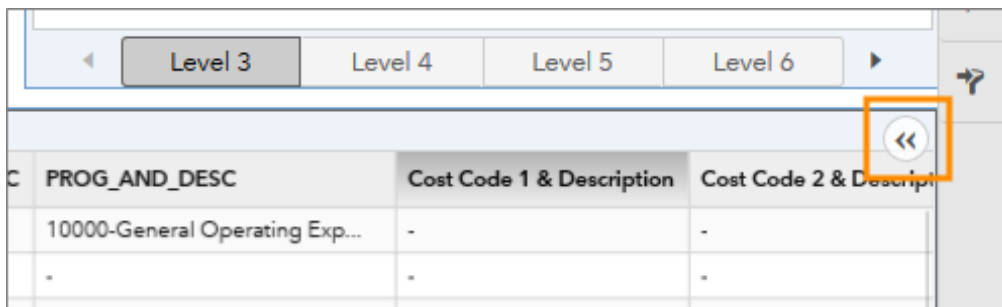
To export search results to Excel, do this:

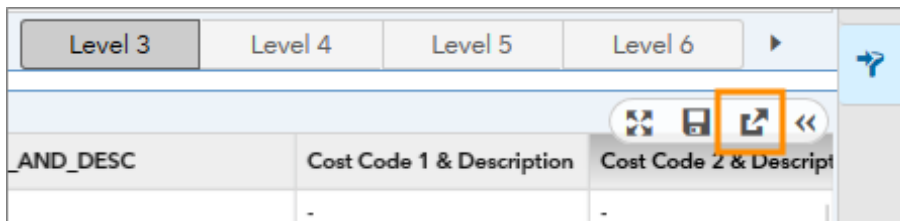1. Click on any row in the search results:

Result: The system displays a double arrow in the upper right-hand corner of the search results.

2. Click the double arrow and then click the Export Data button.

3. Choose the report criteria you need.

4. Click **OK**.

   Note: Excel downloads don't work well in Internet Explorer. If you have problems downloading the report, save the file before opening it.