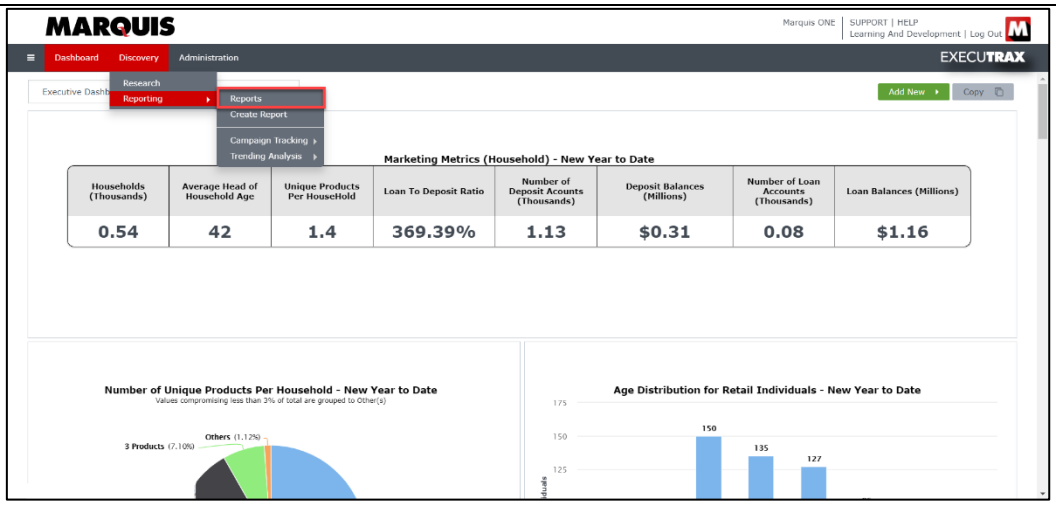
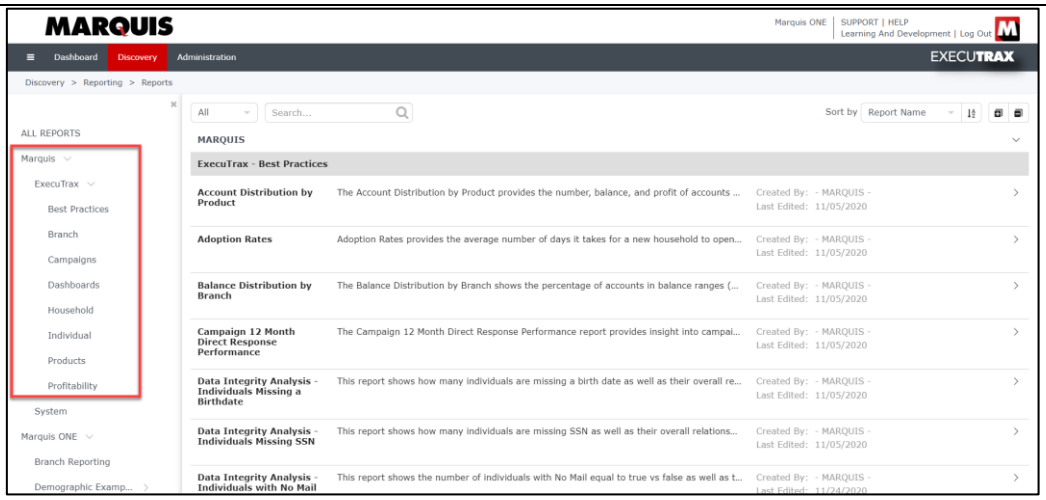
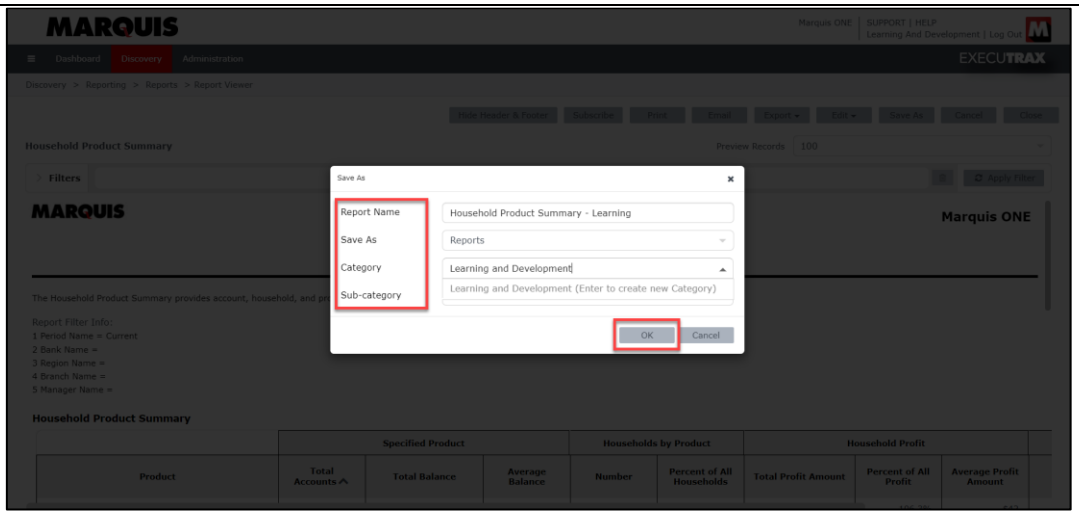
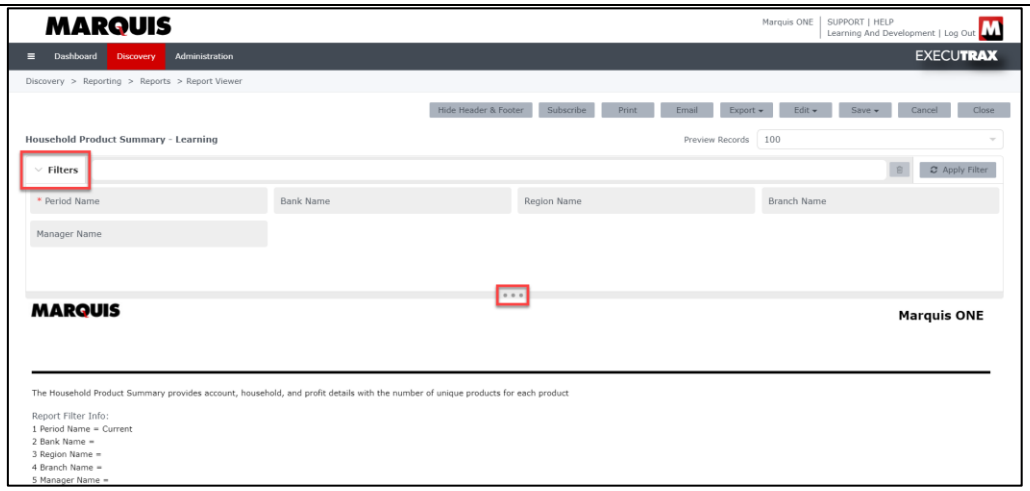
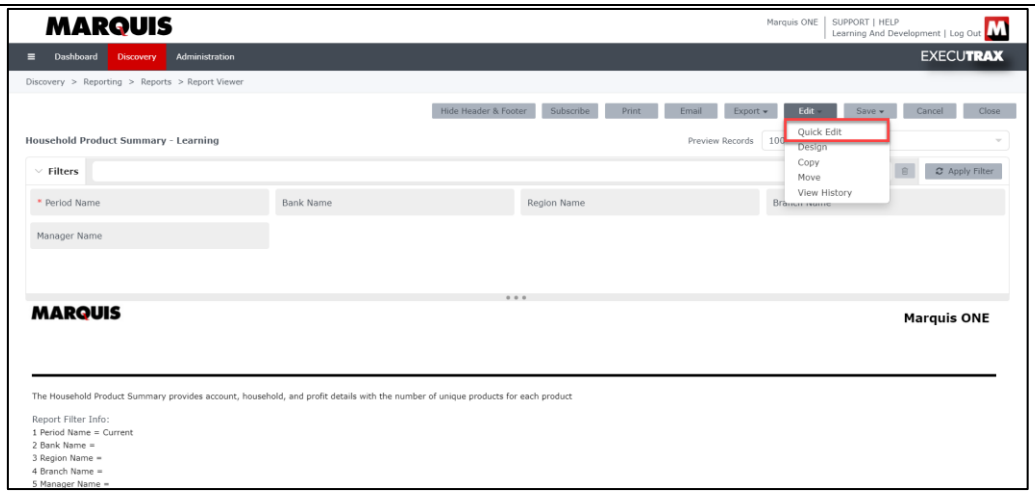
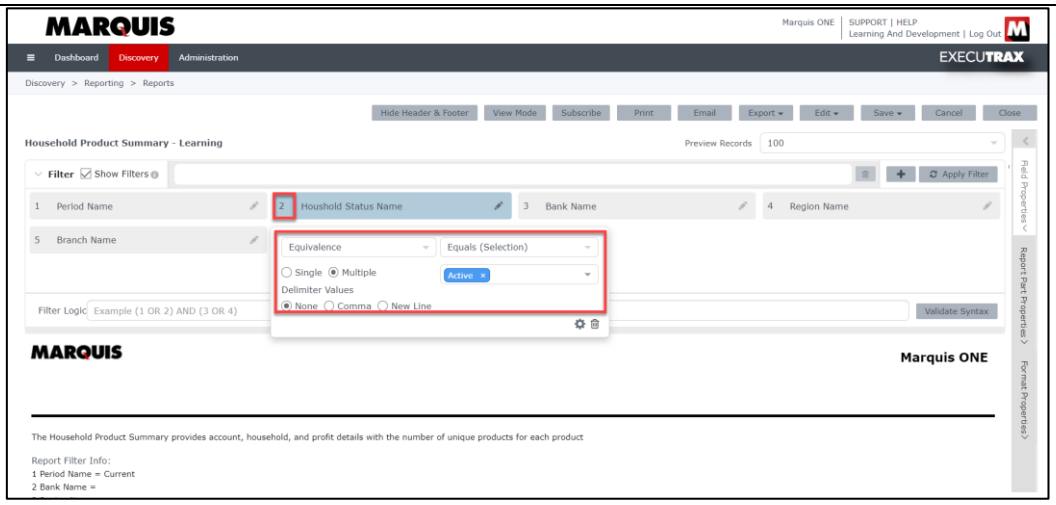
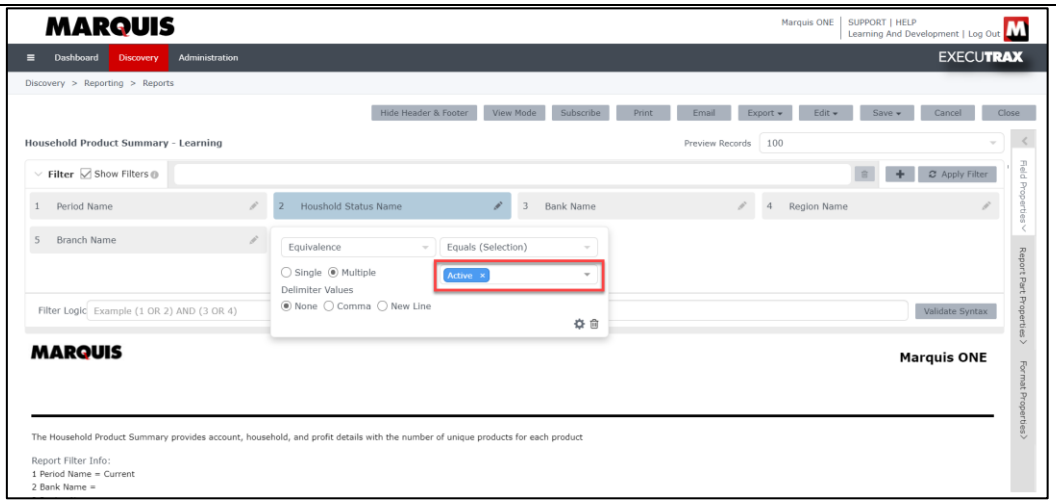
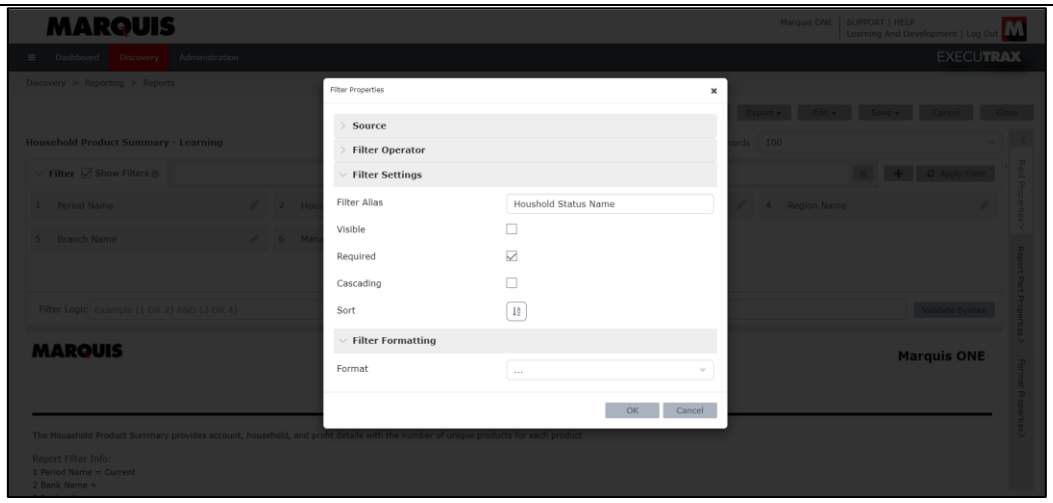
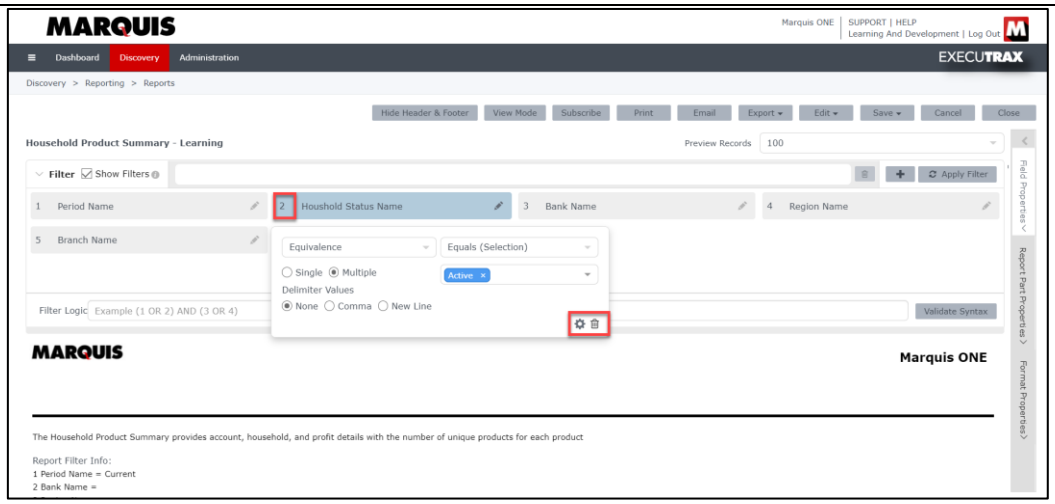
MARQUIS

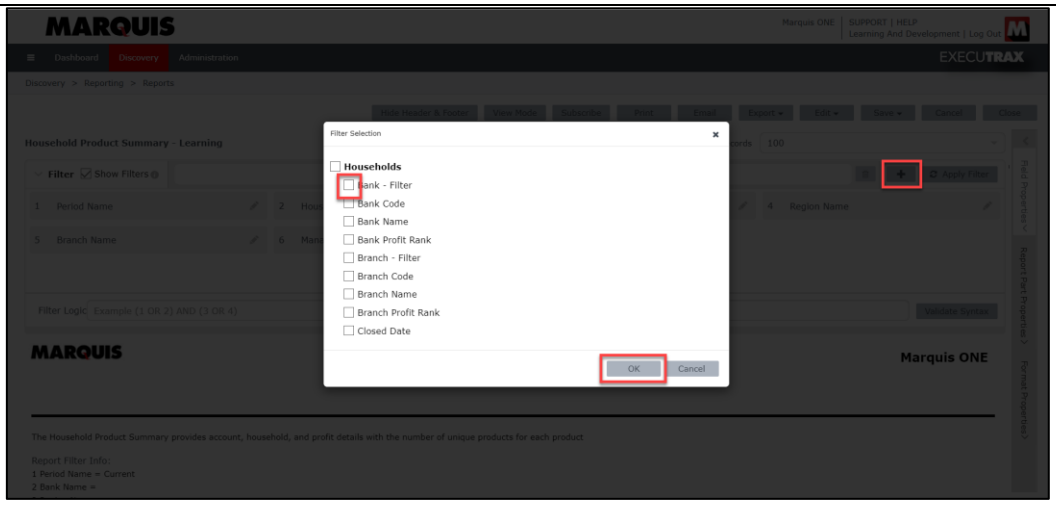
MNET302	Business Insights Editing a Global Report
	This procedure is designed to provide the step-by-step process of saving down and modifying filter parameters in order to further define what data is represented in a global report within Business Insights.
Order of Steps	**Tasks**
Step 1	Log into **Business Insights**
Step 2	Click on **Discovery** in the main menu
Step 3	Hover the mouse over **Reporting**
Step 4	Click on **Reports**
	
	All available reports based on the user's assigned role(s) are listed here.
Note: All reports built by Marquis are grouped within the Marquis category and are further segmented into sub-categories to easily locate specific types of reports based on the information they will provide. Any reports that have been customized by your institution will be located within your own institution category.	
Step 5	Click on the desired category to isolate a type of report, if desired
	
Step 6	To select a report, click on the **bold report name**

Step 7	Prior to customizing, click on **Save As** in the top right menu
7.1	Modify the report Name
7.2	Save As will be defaulted to "**Reports"**
Note: The Category and Sub-category enables the ability to further organize the reports configured and saved specifically for your institution but are not required.	
7.3	To **select** an existing **category**, click the drop-down arrow and click on the desired category
7.4	To **create** a new **category**, type in the desired category name and click ENTER on the keyboard
7.5	To select a **sub-category**, click the drop-down arrow to select from a list or type in the desired sub-category and click ENTER on the keyboard
Note: If inputting a new category or sub-category, you must click ENTER on the keyboard in order to establish them. If you do not click enter, the category or sub-category will be removed. The new category will show in the All Reports menu on the left side of the page under your Institution's name.	
7.6	Click the **Ok** button
	
Step 8	To configure the default filter parameters, click the **> Filters** button
8.1	To expand the filter section, click on the **three dots** and drag down
8.2	Click on each filter **field** to designate a new selection, if desired
8.3	If a drop-down arrow is present, click it and make a selection from a list
8.4	For Multiple Selection fields, click the **drop-down arrow** and click on as many selections, as desired
8.5	To remove a selection from a Multiple Selection field, click the drop-down arrow and click the **X** next to the desired selection to be removed
8.6	For date fields, click in the field and type in the **date** or select it within the calendar box

	
Step 9	Click the **Save** button and choose Save
	The report will now always default to those filter parameter selections moving forward.
	To add or remove fields to the filter section, continue to the next sub step.
Step 10	Click on **Edit**
10.1	Click on **Quick Edit**
	
Step 11	Click on the **arrow** next to Filter to reveal filters
Step 12	Click on three dots, hold and drag down to display all filters
Step 13	Click on the number in the Filter box of the Filter that needs to be adjusted
Step 14	Update Filter settings, as desired
14.1	Click the drop-down arrow in the first box to determine what operator selections will be available
	• Select either Comparison, Equivalence, or Field Comparison
14.2	Click the drop-down arrow in the second box to select the default operator
Note: Equivalent selection will enable the ability to select from a list of lookup selections within the filter. If either of the Comparison options are selected, further operators will be enabled such as Blank, Not Blank, Between, or Greater Than, etc.	
14.3	If Equivalence is chosen, select Single or Multiple to determine how many selections will be allowed

	
14.4	Click the drop-down arrow in the “Select” box to define a default selection(s)
	
14.5	Click the edit cog button to view the filter properties and apply further configuration
	• Source identifies the Type of filter, name of filter Data Source and Filter Name
	• Filter Operator will define the parameters of the filter
	• Use Lookup checkbox will apply any system Lookup Values available for the field
	• Additional Filter Settings are available for further configuration
	○ Filter Alias – re-titling filter
	○ Visible - *checkbox*
	○ Required - *checkbox*
	• Filter Formatting for the display of the filter
	○ Format
	○ Select the font type, sizes, bold, italicized and underline
	○ Select the Color
14.6	Click **OK** button to retain any changes

	
Step 15	To delete a filter, click on the number in the Filter box that needs to be removed
Note: Please be aware that there is not a confirmation message or warning when deleting a filter. Once deleted, it will have to be manually added back as there is not a recall option.	
15.1	Click the trashcan button
	
Step 16	To add a new filter, click the plus symbol in the upper right corner
16.1	Place a checkmark in the box of the desired field to filter on
16.2	Click **OK** button

	
16.3	Click on the number in the new filter box added
16.4	Configure the filter and operator settings
16.5	Click the edit cog button to view the filter properties and apply further configuration
Step 17	Click **Save** button and choose **Save**