STAR System Training

Advanced Reporting

LABS
LAB #1:
EVDRE Report - Custom Page
Key Range and Membersets
LAB #1
Custom Page Key Range and Membersets

GOAL: Make a report that shows **Current Budget and All Actuals** (in columns), for Entities that are direct children of **1RPVP30** (in rows), showing **Revenue, Expenses, and Net** (in rows) for each Entity.

We will walk through the steps together

For future reference, steps are pictured next…
Lab #1 - Steps

1. Set Current View

2. Open blank workbook; build EVDRE using Wizard

3. In Expansion Range, change Memberset for each dimension

4. Page Key Range: delete members already specified in rows/columns, hard-code members as desired, specify multiple members

5. Insert blank column and display AcctStatus property (use EVPRO formula)

6. Freeze Rows & Columns (remove Expansion Range from EVDRE formula)
Lab #1 – Step 1
Set Current View

Current View:

- Application: FINANCIAL
- Campus: ALL_CAMPUSES
- Category: ALL_ACTUALS
- Datasrc: ALL_DATA_SOUR
- Entity: 1RPVP30
- Fund: ALL_FUNDS_BY_N
- Object_financial:
  - RevenueAndExp
- Time: 2009.TOTAL
- Measures: PERIODIC
### Lab #1 – Step 2

Open blank workbook, build EVDRE

<table>
<thead>
<tr>
<th>Step 1: Reporting &amp; Analysis</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2: Open a blank workbook</td>
<td></td>
</tr>
<tr>
<td>Step 3: Click on any blank cell and type (=EVDRE())</td>
<td></td>
</tr>
<tr>
<td>Step 4: Press Enter on your keyboard</td>
<td></td>
</tr>
<tr>
<td>Step 5: Click “Refresh” icon</td>
<td></td>
</tr>
<tr>
<td>Step 6: EvDRE Builder wizard opens with default settings</td>
<td></td>
</tr>
<tr>
<td>Step 8: Member selection: “Self”</td>
<td></td>
</tr>
<tr>
<td>Step 9. Settings: Select “Allow Sorting” (Make sure “Allow Expansions” and “Allow Options” are also selected)</td>
<td></td>
</tr>
</tbody>
</table>
Lab #1 – Step 3
Expansion Range - Memberset

Step 1: Open Control Panel (unhides grouped columns A – D)

Step 2: Unhide Row 15

Step 3: Change Memberset for each dimension (expand after each change to see how report changes)
Lab #1 – Step 4
Page Key Range

Step 1: Delete members for dimensions that are already specified in rows/columns (do not delete for dimensions that are expanding based on member in PageKeyRange)

Step 2: Hard-code members that need to remain the same every time the report is run (regardless of user’s Current View)

Best practice: format hard-coded members bold, as a visual reminder they’re disconnected from Current View

Step 3: Comma-delimited list of members
Multiple members can be specified for a single dimension (dimension not used in expansion)
Lab #1 – Step 5

Insert column & display property

Step 1: Insert a new column to the left of the data columns

Step 2: Type “EVPRO” formula in first data row to display ACCTSTATUS property.
When you Expand, the formula will fill down into all data rows
Lab #1 – Step 6
Freeze Rows & Columns

Step 1: In EVDRE formula, delete the 3rd parameter (points to Expansion Range)

Step 2: Gray out the Expansion Range as a visual reminder that it is not being used

Alternative: If you don’t want to freeze ALL dimensions, you can freeze one at a time by choosing “NOEXPAND” in the Memberset.
## Lab #1 - Report

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Expansion 1</th>
<th>Expansion 2</th>
<th>Expansion 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Expenses</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Net Income</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Financial Application
- **Campus**: All Campuses  
- **Category**: All Categories  
- **Data Source**: All Data Sources  
- **Entity**: All Entities  
- **Funds**: All Funds

### Revenue/Expenditure
- **Object**: Revenue and Expenditure
- **Time**: 2009, Total

<table>
<thead>
<tr>
<th>Date</th>
<th>Budget</th>
<th>Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-01-01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009-02-01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009-03-01</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Current, Budget, Actuals
- **Current Budget**:  
- **Budget**:  
- **Actuals**:  

###STAR
- **Strategic Tracking, Analysis, and Reporting**
LAB #2: Make it fancier!
LAB #2
Make it fancier!

GOAL: Make a report that shows All Actuals (in columns), for Entities that are direct children of 1RPVP30 (in rows), showing Revenue, Expenses, and Net (in rows) for each Entity. Use EVDRE functionality and options to customize your report:

- Suppress zeros
- Insert blank lines using AfterRange
- Sort rows
- Hide Row Key and Column Key ranges
- Hide Control Panel, add report title

We will walk through the steps together.

For future reference, steps are pictured next…
Lab #2 - Steps

1. Set Current View

2. Open blank workbook; build EVDRE using Wizard

3. In Expansion Range, change Memberset for row expansions

4. Suppress zeros for Entity dimension

5. Add AfterRange to Object_Financial expansion

6. Sort rows by Entity Description using SortRange

7. Hide RowKeyRange and ColKeyRange

8. Group rows at top (to hide), hide Control Panel, add report title
Lab #2 – Step 1
Set Current View
Lab #2 – Step 2
Open blank workbook, build EVDRE

Step 1: Reporting & Analysis

Step 2: Open a blank workbook

Step 3: Click on any blank cell and type =EVDRE()

Step 4: Press Enter on your keyboard

Step 5: Click “Refresh” icon

Step 6: EvDRE Builder wizard opens with default settings


Step 8: Member selection: “Self”

Step 9. Settings: Select “Allow Sorting” (Make sure “Allow Expansions” and “Allow Options” are also selected)
Lab #1 – Step 3
Expansion Range - Memberset

Step 1: Open Control Panel
(unhides grouped columns A – D)

Step 2: Unhide Row 15

Step 3: Change Memberset for each dimension (expand after each change to see how report changes)
Lab #2 – Step 4
Suppress Zeros

Step 1: Type “Y” in Suppress row for Entity expansion

Step 2: Expand – Entities will no data will be excluded
Lab #2 – Step 5

AfterRange

Step 1: In AfterRange row of Object_Financial expansion, specify area to be inserted after each group of Objects (use EVRNG formula). Align range above report to make sure it is correct width.

Step 2: Expand

Report now shows a blank line after each Object_Financial grouping (i.e., after each set of Revenue, Expense, RevenueAndExpense)
Lab #2 – Step 6

SortRange

Step 1: Make sure SortRange row of KeyRange area refers to SortRange area (use EVRNG).

Step 2: In SortRange area, specify column on which to sort (can specify up to 3 columns, in order). In Order row, specify A (ascending) or D (descending).

Step 3: Expand. Report is now sorted by Entity Description, in ascending order.
Lab #2 – Step 7
Hide Row & Column Keys (OptionRange)

Step 1: Make sure OptionRange row of KeyRange area refers to OptionRange area (use EVRNG).

Step 2: In OptionRange area, type “Y” next to “HideColKeys” and “HideRowKeys”.

Lab #2 – Step 8
Group Rows, Hide Control Panel, Add Title

Step 1: Highlight rows to group

Step 2: Data → Group and Outline → Group

Step 3: Hide Grouped rows & columns (click on minus signs)

Step 4: Type and format report title in visible area

Results

Report before

Report after

Super Duper Report
Homework

• Do these labs again at your desk!
• Make your existing Excel reports into STAR EVDRE reports (we will help you!)
• Practice, practice, practice
  – Playing with EVDRE is the quickest way to learn it
  – Never fear, you can’t break the data!
Getting Help

• EVDRE Quick Reference Guide
• SAP Advanced User’s Guide
  (both posted at http://budget.asu.edu/
   under STAR System Information)

• Online Help in STAR

• Contact STAR administrators (Jennifer Wilken, Ken Armijo, and Stephanie Metz):
  – STARadmin@asu.edu
  – (480) 727-0669