ExpenseWatch.com Custom Reporting Report Viewer QuickStart Guide

Introduction

This quickstart guide will help you get started with ExpenseWatch.com's Custom Reporting Module. The Custom Reporting Module adds the ability to create a wide-range of reports and dashboards specific to your business needs.

As a Report Viewer you have the ability to run custom reports and dashboard built for you by your company's Report Builder.

The Custom Reporting Module is an optional module your company may subscribe to and requires your company's ExpenseWatch.com administrator to assign the proper license and permissions. Contact your company's ExpenseWatch.com Administrator if you do not see the Tabs and Menu options described in this QuickStart guide.

Section Index

Viewing Custom Reports & Dashboards

Step 1

Launch the Custom Reporting Module by clicking on the **Reporting Tab**, then click on the **View Custom Reports** link under the Custom Reporting menu.

If your company has suscribed to the optional scheduleing feature you will have a link under the **Reporting Tab**, **View & Schedule Custom Reports**

Step 2

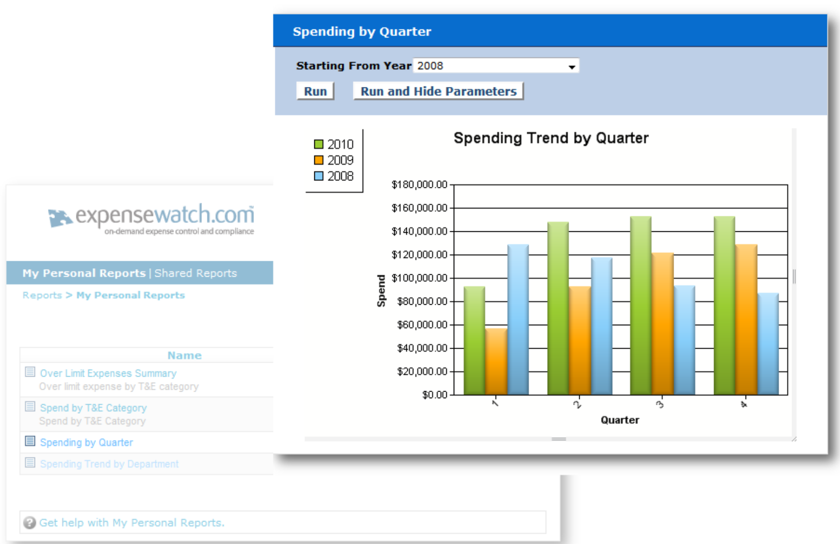
The Custom Reporting Module will open in a new browser window or tab. From the main window you can choose to view a report from the **My Personal Reports** folder of from the **Shared Reports** folder.

- **My Personal Reports**: A list of reports assigned to you by your company's Report Builder. Reports in the My Personal Reports area can only be viewed by you.
- **Shared Reports**: A collection of reports and dashboards shared by all Report Viewers in your company. Click on the **Shared Reports** link to view your company's custom reports.

The Report Viewer role can only view pre-built reports or reports built by your company's Report Builder. If you do not see any report contact your company's ExpenseWatch.com Administrator. To build your own reports you need to be assigned the Report Builder license and permission.

Step 3

Click on the name of the report or dashboard to view the report. The Custom Reporting Module will run the report and display the results in a new browser window or tab. Custom reports and dashboards can have parameters that allow you to filter the results. Report parameters and the format of the report (graph, chart, table, etc.) are configured by the Report Builder.



Scheduling Custom Reports Option

The Report Scheduling feature is an optional feature your company can subscribing to. The scheduling feature allows you to create a schedule for your reports in the **My Personal Reports** area or subscribe to a **Shared Report** schedule. After you have subscribed to a report schedule the ExpenseWatch.com Custom Reporting Module will run the

If the Report Scheduling feature is not enabled for your company or if the scheduling license and scheduling permission has not been assigned to your ExpenseWatch.com account you will not see the features described in this section. Contact your company's ExpenseWatch.com administrator to enable the Report Scheduling feature.

With the Report Scheduling feature enabled for your account you will see an **Actions** menu added to the left of the list of reports.

Step 1

Click on the icon for the report you would like to setup a report schedule for or to subscribe to a pre-configured schedule.

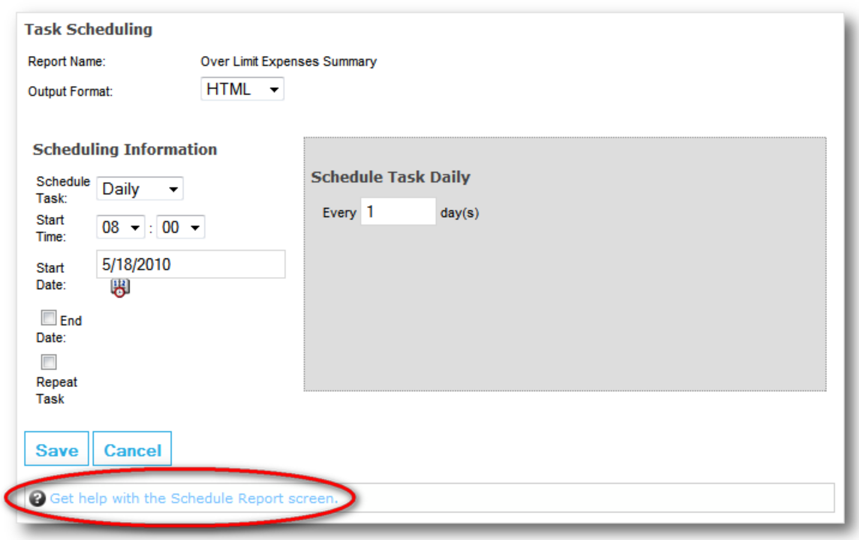
Step 2

Report Schedules can be created modified and subscribed to. Before subscribing to a report schedule, a scheduling task needs to be created.

Reports in the **Shared Report** area can only be subscribed to if the Report Builder has created a schedule. You will only see the icon for those reports that have a schedule to subscribe to.

Setup a New Schedule

You can crate report schedules for reports in your **My Personal Reports** area. After clicking on the icon the **Task Scheduling** page will be displayed. Set the options for you the task and click the save button. For more information about **Task Scheduling** options click the get help link at the bottom of the page.



Subscribe to a Report Schedule

After you have saved the schedule you need to subscribe to the report schedule. Click the icon for the report you wish to subscribe to. And click the **Subscribe** button.

To unsubscribe from a schedule you previously subscribed to click the **Unsubscribe** button.