Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
4105	MERLIN Creating Filters with Range and Exception Reporting	Effective Date: 08/28/2017
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**MERLIN Creating Filters with Range and Exception Reporting
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Exception Reporting

Exception reporting provides a powerful way to identify exceptional data in your report. Conditional formats tell Impromptu to look through data in selected report objects and format specific data that meet pre-defined conditions. For example, Projections over a specific dollar value can be highlighted in red. There are <u>two</u> parts to exception reporting: setting up the condition to analyze the data in the report and setting up the style to associate with that condition.

Your Action…	System Response…

1. To create a custom conditional format on a value:
 	
    Select the item.
    Select **Conditional Formats...** from the **Format** menu.
    Click **Conditions...**
    Click **Add Custom Condition...**
    Enter a name for this custom condition.
    Complete the **Expression**.
    Click **OK** and close the **Conditions** window.
    Select a style from the **Change Style to***:* dropdown menu	

Filtering to Retrieve a Range of Data

Data can be filtered to retrieve a specific range of data. For example, you can retrieve data within a range of Minor Object Codes. When prompts are created for a beginning and ending minor object code, a user will enter numbers. Because minor object codes are *strings* in the data warehouse, it will be necessary to convert them to *numbers* when creating the prompts.

Exercise 1

Modify the report you created in the last exercise by displaying in red the values greater than 3000 in the Projection column. Then add another prompt to filter the Minor Object Codes to a range. Your report and prompt should appear as shown below (Note: the actual data may not be identical).

Your Action…	System Response…
1. Open the Exercise 1 report you saved in the last chapter.	

Your Action…	System Response…
2. Retrieve a report for: Budget Year = **1997** Accounting Month = **07** Projected increase = **.10**	
3. Create a Conditional format on the Projection column. Select a data item in the **Projection** column. Select **Conditional Formats...** from the **Format** menu. Click **Conditions...** Click **Add Custom Condition...** Type **Good Projection** in the **Name** field. Complete the **Expression** as follows: **Projection < 25.** Click **OK** to close the **Condition Definition** window. Click **Add Custom Condition...** Type **Bad Projection** in the **Name** field. Complete the **Expression** as follows: **Projection>100.** Click **OK** and **Close** the **Conditions** window. Highlight **Good Projection** in the **Conditional Formats** window. Select **Good (color)** from the **Change Style to:** list box. Highlight **Bad Projection** in the **Conditional Formats** window. Select **Poor (color)** from the **Change Style to:** list box. Click **OK.**	
4. Create a filter range for Minor Object Code. Open the **Filter** tab and double click **and** Click **(** Open the **Report Columns** folder and double click **Minor Obj Code.** Double click **between.** Double click **Prompt Manager.** Click **New...** Type **Beginning Minor Object Code** in the **Name** field. Type "**Type in the beginning Minor Object code for the range selection".** Click **OK** Click **OK**	

Your Action…	System Response…
Continued. Click **and.** Double click **Prompt Manager.** Click **New...** Type **Ending Minor Object Code** in the **Name** field. Type "**Type in the ending Minor Object code for the range selection"** Click **OK** Click **OK** Click **)** Click **OK**	
5. Test the new prompt. Budget Year = **1997** Accounting Month = **07** Projected increase = **.15** Beginning Minor Object Code = **61000** Ending Minor Object Code = **62000**	
6. Modify the title to include the **beginning** and **ending Minor Object Code** prompts. Highlight the title text frame and drag the frame to enlarge it Select **More Objects...** from the **Insert** menu Highlight **Prompt variables** in the **Available Objects** list Click **Insert** Select **Beginning Minor Object Code** from the *Choose Report Prompt window* Click **OK** Place the tip of the arrow at the end of the current title and click Modify the title that is inserted Repeat the above steps for **Ending Minor Object Code**	
7. Create Smart Summaries on the Bud Exp and Projection columns. Select the **Bud Exp** column Ctrl>Click the **Projection column** Click the **Total** Power button Create labels for *Minor Obj Code Total* and *Grand Total*	

Your Action…	System Response…
8. Include the Projection Grand Total in the title. Scroll to the bottom of the report and select the **grand total value** (Note the Status Line shows *Total (Projection) No. 1 [for Report]*) Select **Data** from the **Insert** menu Click in title at appropriate location Select **total (Projection) No 1 (for Report)** in the **Query Data** list Click **Mark** *for* **Insertion** Click **OK**	
9. To save the report as a spreadsheet file, the spreadsheet application must be installed. Click **Save as** in the **File** menu Select **Excel with Format** from the **Save File as Type** dropdown menu Enter a new name in the **File Name** field Select an appropriate directory	
10. Close the report.	

Challenge 2 - Filter Ranges w/Exception Reporting

Modify the chall_5 report by removing the hard-coded agency name filter and adding a filter for beginning and ending Fund Number. Create a report beginning with Fund Number 2300 and ending with Fund Number 2399. Show any value greater than 500,000 in red.