# Mississippi Management and Reporting System

### **Department of Finance and Administration**

MMRS MASH/Training Materials		
4105	MERLIN Creating Filters with	Effective Date: 08/28/2017
	Range and Exception Reporting	Version: 3

## MERLIN Creating Filters with Range and Exception Reporting Table of Contents

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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 two 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
	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	

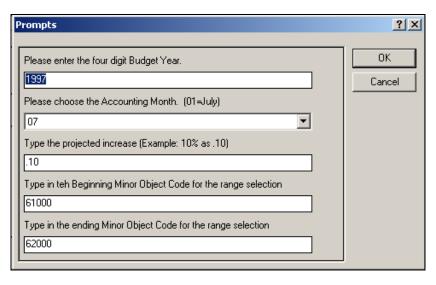
#### Filtering to Retrieve a Range of Data

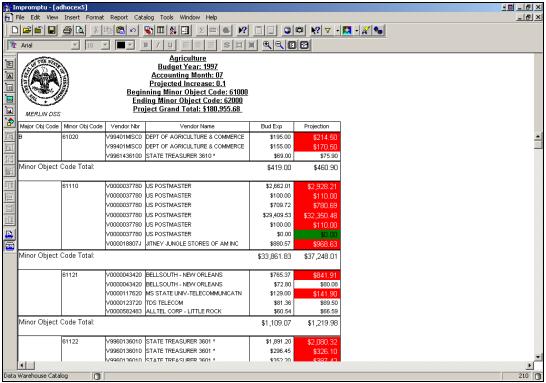
Data can be filtered to retrieve a specific range of data. For example, you can retrieve data within a range of Minor Object Codes. When prompts are created for a beginning and ending minor object code, a user will enter numbers. Because minor object codes are *strings* in the data warehouse, it will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

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#### **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.	

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Your Action		System Response
2	Retrieve a report for:	O Jotom 130pondom
۷.	Nomovo a roportion.	
1	Budget Year = <b>1997</b>	
	Accounting Month = <b>07</b>	
	Projected increase = .10	
2	Create a Conditional format on the	
ა.		
	Projection column.	
	Calant a data itam in the Draination	
	Select a data item in the <b>Projection</b>	
	column.	
	Select Conditional Formats from the	
	Format menu.	
	Click Conditions	
	Click Add Custom Condition	
1	Type Good Projection in the Name field.	
	Complete the <b>Expression</b> as follows:	
	Projection < 25.	
	Click <b>OK</b> to close the <b>Condition</b>	
1	<b>Definition</b> window.	
	Click Add Custom Condition	
	Type <b>Bad Projection</b> in the <b>Name</b> field.	
1	Complete the <b>Expression</b> as follows:	
1	Projection>100.	
	Click <b>OK</b> and <b>Close</b> the <b>Conditions</b>	
	window.	
	Highlight <b>Good Projection</b> in the	
	Conditional Formats window.	
	Select Good (color) from the Change	
	Style to: list box.	
	Highlight <b>Bad Projection</b> in the	
	Conditional Formats window.	
	Select <b>Poor (color)</b> from the <b>Change</b>	
	Style to: list box.	
	Click <b>OK</b> .	
4.	Create a filter range for Minor Object	
1	Code.	
1		
	Open the <b>Filter</b> tab and double click <b>and</b>	
	Click (	
	Open the <b>Report Columns</b> folder and	
	double click Minor Obj Code.	
	Double click <b>between.</b>	
	Double click <b>Prompt Manager.</b>	
	Click New	
	Type <b>Beginning Minor Object Code</b> in	
	the <b>Name</b> field.	
1	Type "Type in the beginning Minor	
1	Object code for the range selection".	
1	Click <b>OK</b>	
1	Click <b>OK</b>	
	Onon Git	

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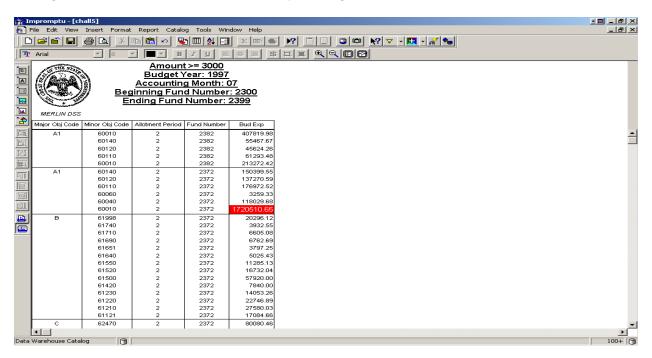
	Your Action	System Response
	Continued.	- J. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.
	Click and.	
	Double click <b>Prompt Manager.</b>	
	Click New	
	Type Ending Minor Object Code in the	
	Name field.	
	Type "Type in the ending Minor Object	
	code for the range selection"	
	Click <b>OK</b>	
	Click <b>OK</b>	
	Click )	
	Click <b>ÓK</b>	
5.	Test the new prompt.	
	Budget Year = <b>1997</b>	
	Accounting Month = <b>07</b>	
	Projected increase = .15	
	Beginning Minor Object Code = <b>61000</b>	
	Ending Minor Object Code = <b>62000</b>	
6.	Modify the title to include the <b>beginning</b>	
	and <b>ending Minor Object Code</b> prompts.	
	Highlight the title text frame and drag the	
	frame to enlarge it	
	Select More Objects from the Insert	
	menu	
	Highlight <b>Prompt variables</b> in the	
	Available Objects list Click Insert	
	Select Beginning Minor Object Code	
	from the <b>Choose Report Prompt</b> window	
	Click <b>OK</b>	
	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 <b>Ending</b> Minor Object Code	
7	Create Smart Summaries on the Bud Exp	
' :	and Projection columns.	
	and r rejection columns.	
	Select the <b>Bud Exp</b> column	
	Ctrl>Click the <b>Projection column</b>	
	Click the <b>Total</b> Power button	
	Create labels for <i>Minor Obj Code Total</i>	
	and <i>Grand Total</i>	

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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.



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