

The Art of Strategic Reporting Unveiling MIP Reports (3C)

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2024 | BOSTON
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- Please make sure you sign in on the sheet.
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- The survey can be completed using your mobile device. Optional paper surveys are available and must be turned in at the registration desk.
- Please silence your mobile device during the presentation.



Introduction



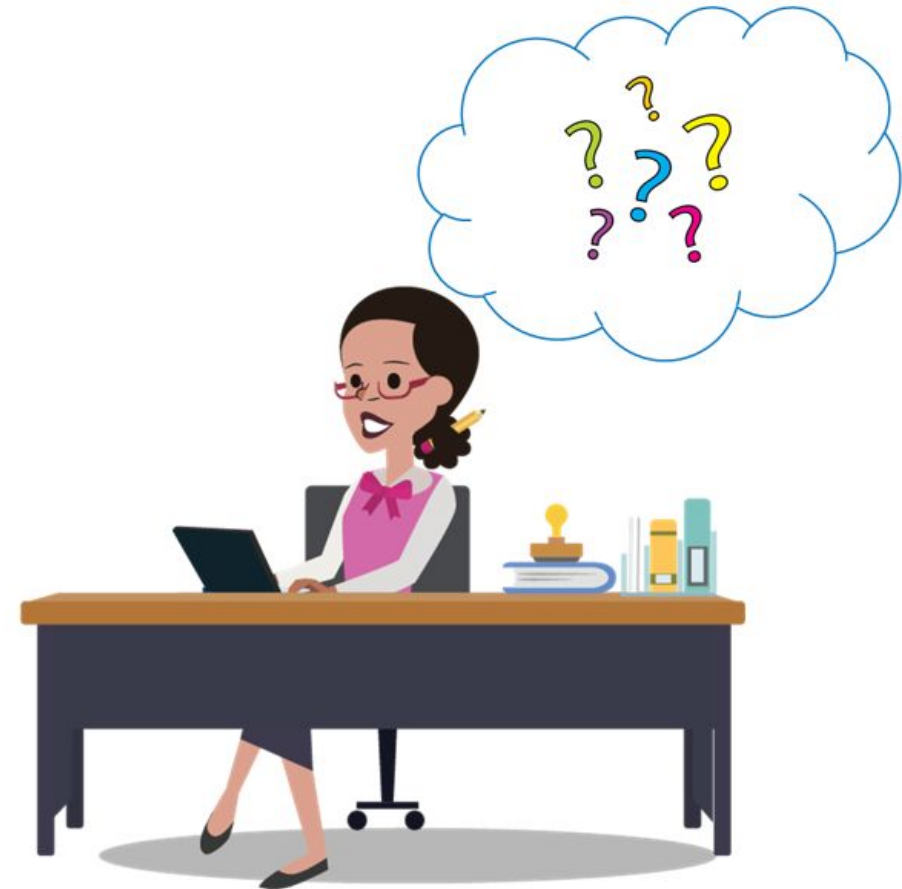
Lucy Brennan Project Consultant

- Masters in Business Administration
- 30 years experience in all levels of accounting and finance
- More than 15 years of MIP experience in nonprofit settings

Session Objectives

Objectives:

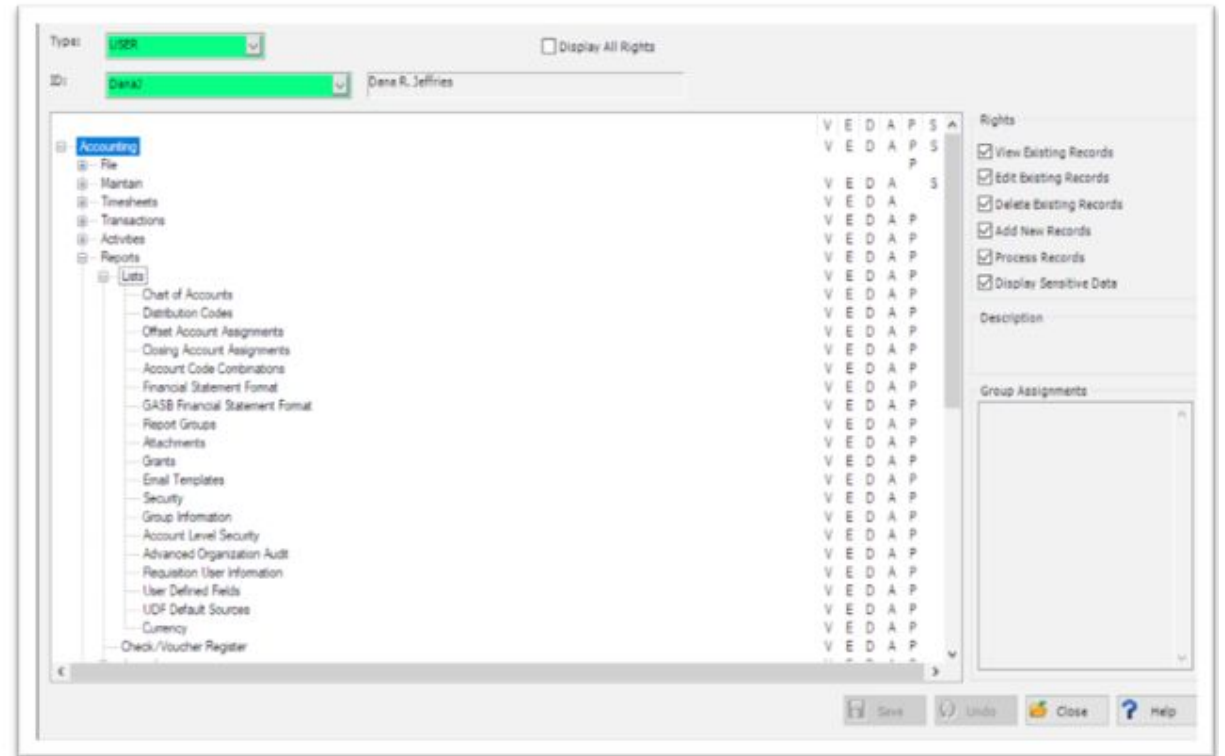
- Review Security Rights for Reports
- Pre-defined/Default Reports
- Basic Reporting Features
- Process Manager
- Additional Tips





Review Security Rights for Reports

- If you cannot see a report, you don't have proper rights to see the report
- To change security rights, navigate to Security>>Set up Organization Menus
 - Expand Accounting
 - Expand Reports
 - Select Report type you need
 - Set rights on the right hand side





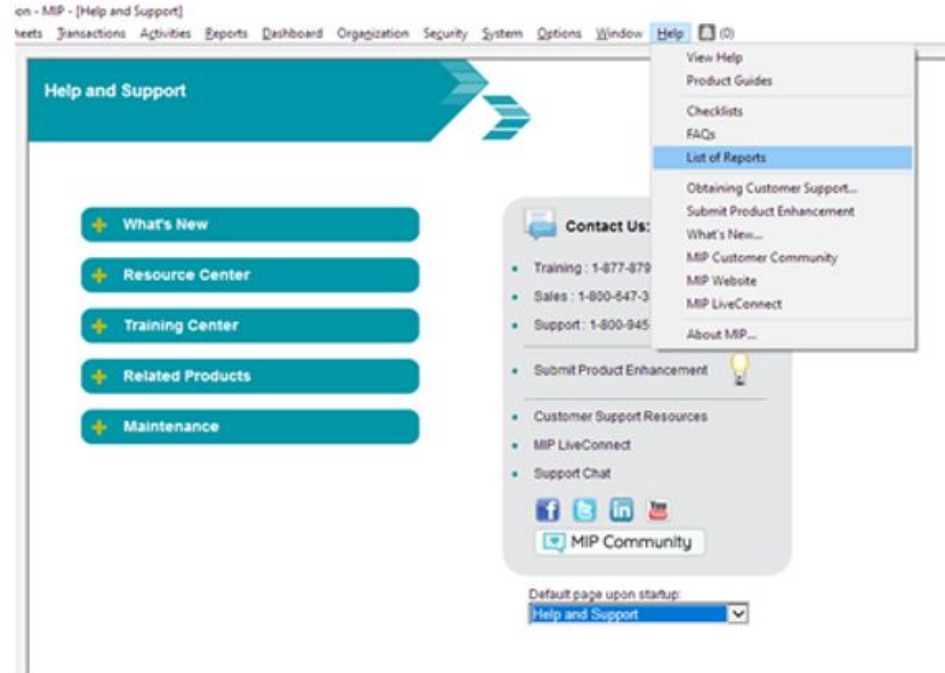
Pre-defined/Default Reports

For a list of predefined reports along with a brief description:

- Navigate to Help

Pre-defined reports are identified by brackets "<" ">" around the report name

- Gives you a starting point for either processing or modifying a report
- Any change to a predefined report requires that you give the report a new name.
- Recommendation is to use the Copy/Save/Rename icon





Basic Reporting Features

Navigate to Reports on the menu across the top of MIP

- Reports are grouped by type
- 5 Standard Tabs on Each Report:
 - Setup, Content, Filter, Layout, Security.
 - Content on each of these tabs may vary depending on the type of report.
 - Additional tabs may also be present depending on the type of report.
 - Options, Groups, Forecasting

Reports	Dashboard	Organization	Sec
Lists			>
Check/Voucher Register			
Journals			>
Transactions			>
General Ledger Analysis			>
Quick Financial Statements			>
Financial Statements			>
GASB Reporting			>
990 Worksheets			>
Assign Report Groups			
Forms Designer			
Report Binder			
Accounts Payable			>
Accounts Receivable			>
Allocation Management			>
Bank Reconciliation			>
Budget			>
Encumbrances			>
Fixed Assets			>
Payroll			>
Purchase Orders			>
Requisitions			>



Basic Reporting Features

Useful icons:

Copy/Rename

- Allows you to make copies or rename a report



Print Report Setup

- Allows you to select which printer, number of copies, etc.



Print Setup

- Also allows you to select orientation





Basic Reporting Features

Useful icons (continued):

Print to Screen

- Allows you to view the report



Print Preview

- Allows you to view the report as it would be if printed



Print

- Sends report to printer





Basic Reporting Features

Useful icons (continued):

Export

- Allows you to select the *type* of file to export

Export to Excel

Export to PDF

Email Report as PDF

- Email SMTP must be set in MIP





Basic Reporting Features

Setup Tab

- Select the report name whether it is a predefined report or one that a user created.
- Select whether the report name should be printed in the header or the footer of the report.
- Some Setup Tabs will require date information and more advanced reports will require format to be selected.

Setup | Content | Filter | Layout | Security

Report Name
COA by segment

10/30/2018 7:07:03 AM

Print Name In
 Header Footer Do Not Print

Page Footer
 Included



Basic Reporting Features

Content Tab – top portion

Arrange data in report using page breaks

- Move items from the Available box on the left to the Selected box on the right

Setup | Content | Filter | Layout | Security

Items by Page (Optional)

Available Items	Selected Items	Sort	Print
Segment Sequence	Segment Name	Asc	Segment Name - Segment Sequence
Designation Code			
Form 990EZ Line Number			
Form 990 Line Number			
Last Check Number			



Basic Reporting Features

Content Tab – bottom portion

Used to determine which columns appear on the report

Various setting options can be selected for each column such as sort order, show total, width, wrap, repeat columns and column headings.

Report Body (Total Width: 5.60)

Available Columns	Selected Columns	Sort	Width	Show Repeats	Wrap	Column Heading
Segment Sequence	Account Code	Asc	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account Code
Account Short Title	Account Title	None	2.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account Title
Designation Code	Status	Asc	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Status
Designation Description	Account Type	Asc	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account Type
Form 990EZ Line Number						
Form 990 Line Number						
Last Check Number						
Required Account Assignments						
Stage						
Award Number						
Project Director						
Award Type						
Notification Date						
Grant Period Start Date						

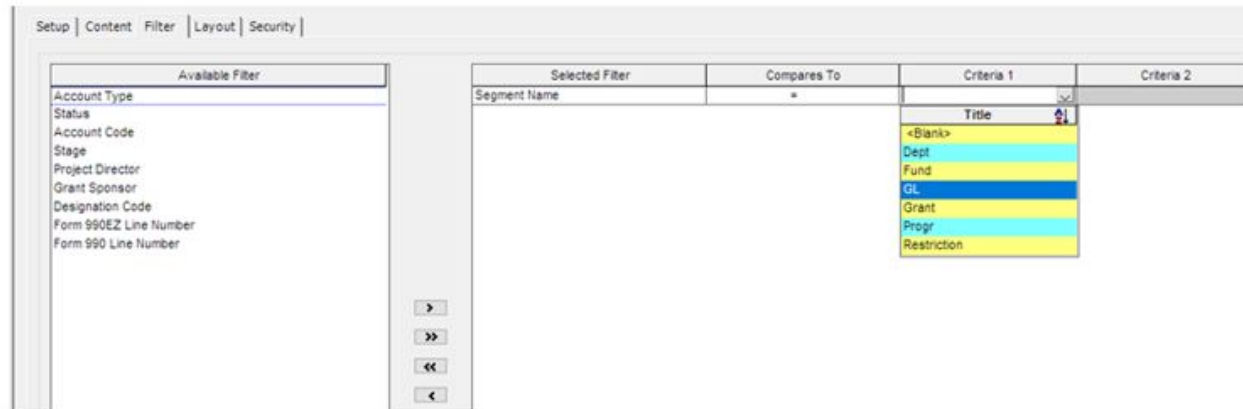


Basic Reporting Features

Filter Tab

Use this tab to narrow down and more explicitly specify the data to include in your report.

Filtering items not selected on the Content tab, the data will not labeled on the report.

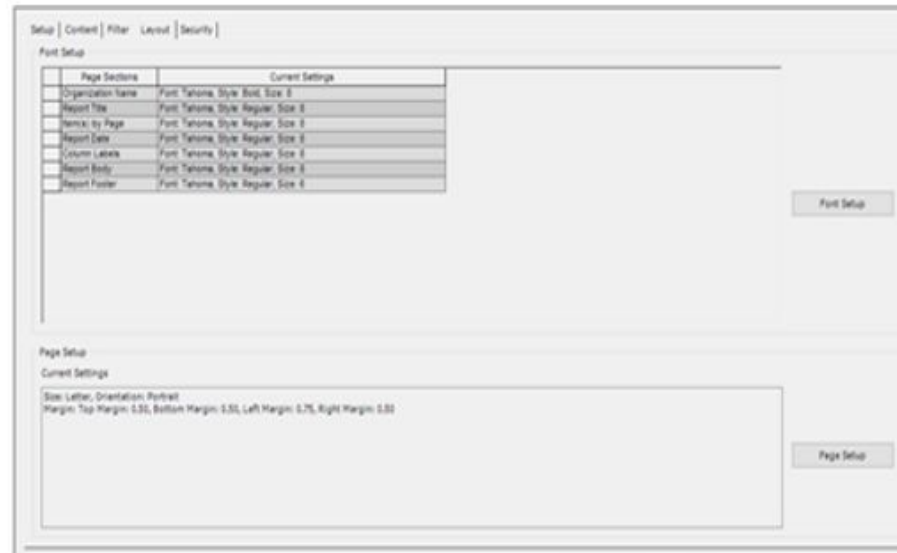




Basic Reporting Features

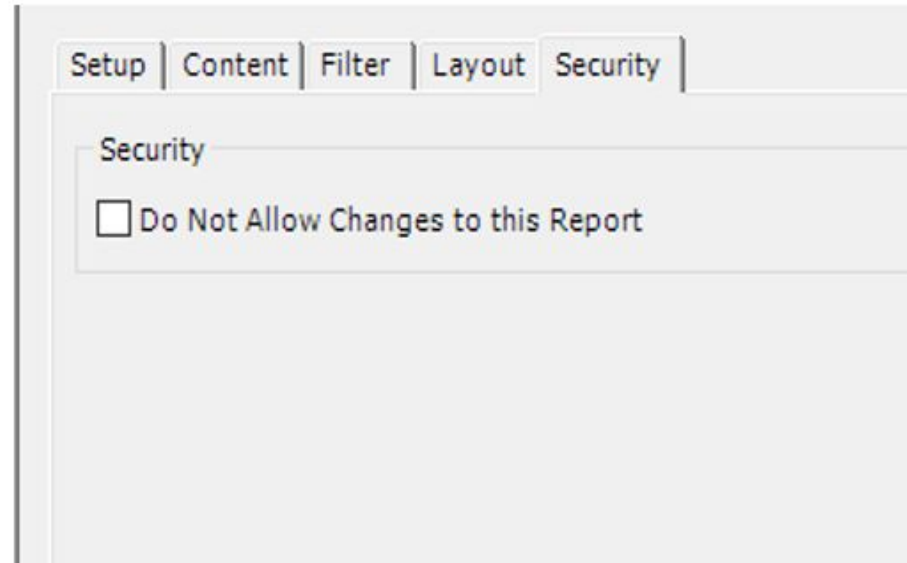
Layout Tab

Allows you to change font, style, orientation of report



Security Tab

Allows you to prevent changes to report



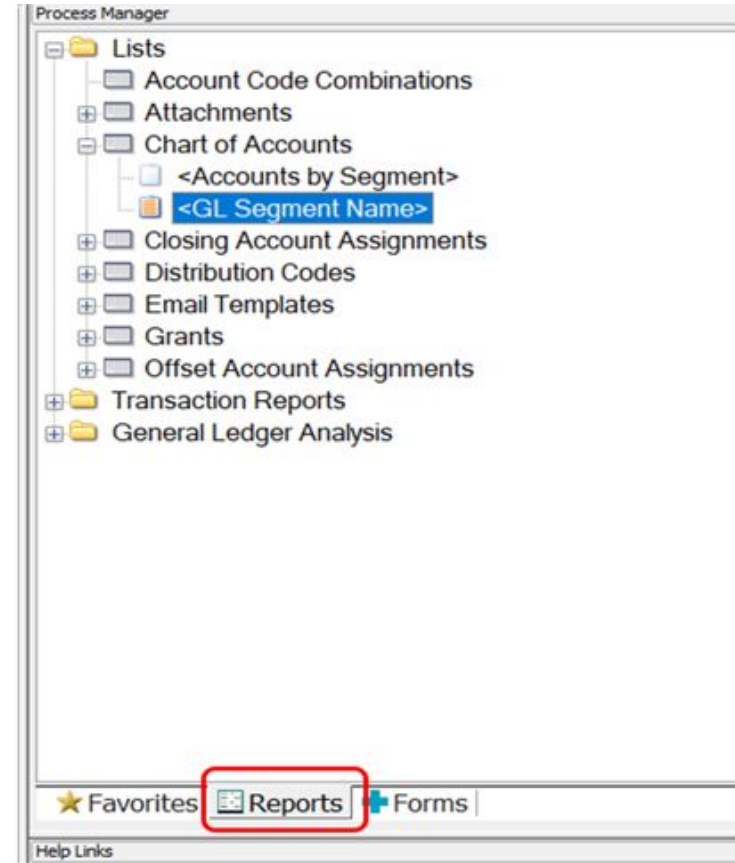


Process Manager

Make Sure Process Manager is turned on under the View Menu.

- **Reports Tab**
 - Expanding sections displays pre-defined reports as well as newly created reports

Note: Reports listed will change depending on area of MIP selected in Navigator



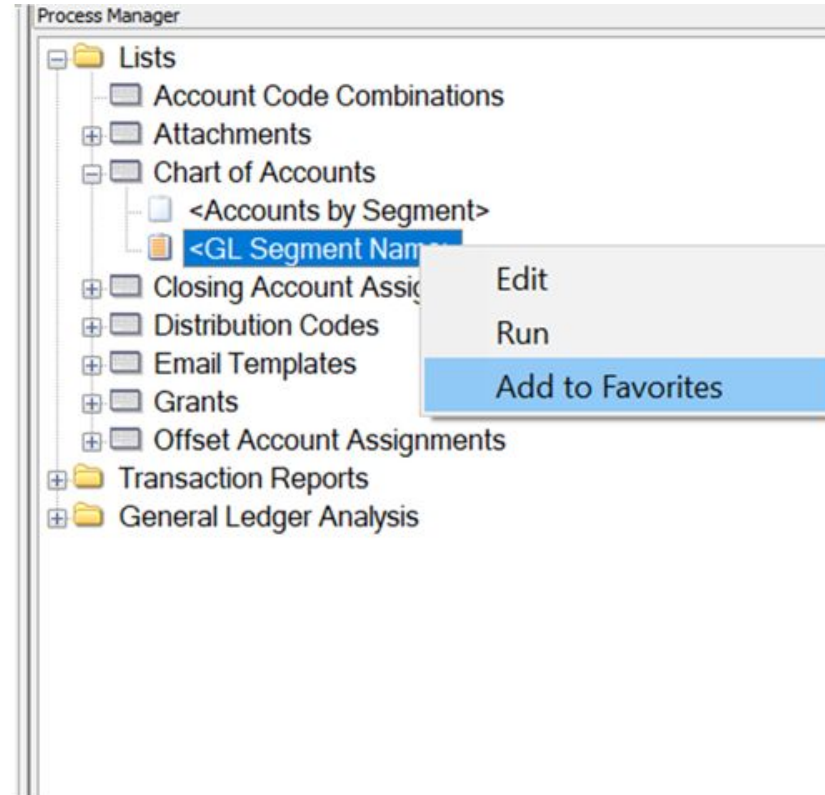
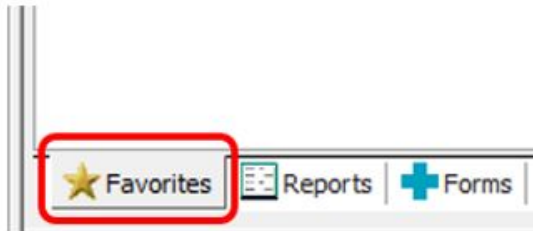


Process Manager

Add reports to 'Favorites'

- Right click on specific report to edit or run the report or,
- Select **'Add to Favorites'**

This puts the selected report on your Favorites tab for easy access no matter where you are in the Navigator!





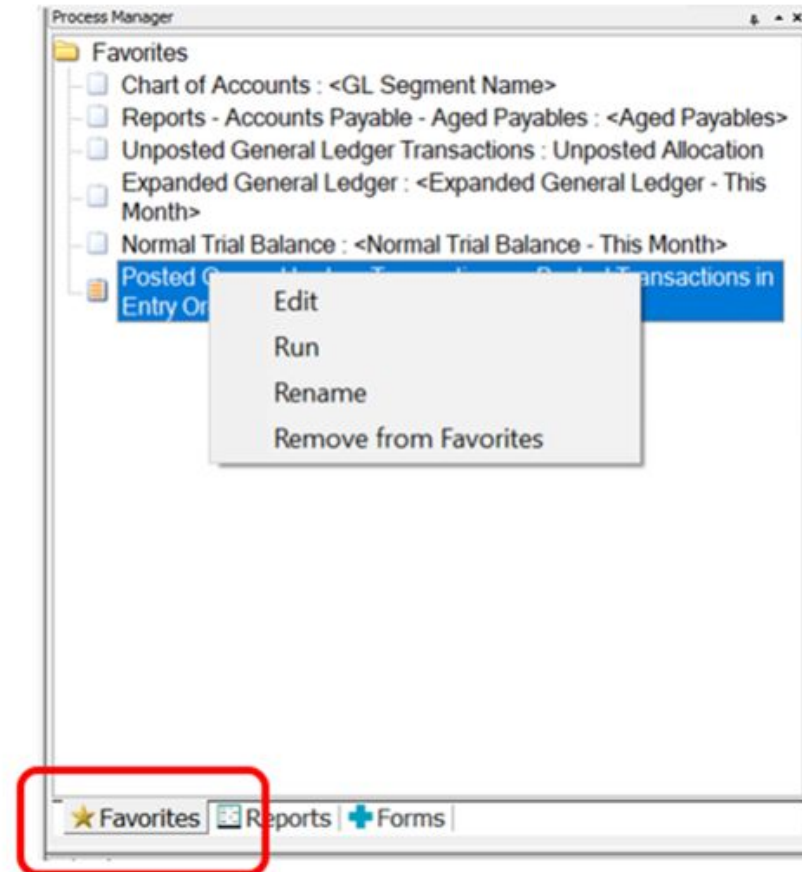
Process Manager

Any reports added to Favorites tab will be at your fingertips

Right-click on a report to:

- Edit
- Run
- Rename or
- Remove from Favorites

Note: Running a report will run it exactly as the last time it was saved.





Process Manager

- Organize your Favorites by creating additional folders!
 - Right click on the Favorites folder and select Create Folder
- You can also Publish folders to share them to other users
 - Right click on the Favorites folder and select Publish Folder
- Other users can import published folders to use shared folders
 - Right click on the Favorites folder and select Import Published Folder

*Using the Process Manager can be useful to increase productivity, so users are not hunting for the correct report to run.



Additional Tips

- Default reports give you a starting point so you don't have to format your report from scratch
- Recommendation is to use the Copy icon and make a copy of a default report
 - Any change to a default report, requires that you give the report a new name, in effect creating a copy.
- Create as many reports as needed. Be sure the report names are easily recognizable and relate to either how the reports are set up or who created them.
- On content tab, between top and bottom portion, the Total Width is displayed
 - This total includes the space between each of the columns (0.2").
 - The minimum column width you can enter for an individual column is 0.1", while the maximum is 7.0".





Additional Tips

- If you filter and item that has not been selected in the Report Body on the Content tab, the data will not appear on the report.
- To filter on a Debit or Credit, you will need to press the dash key prior to entering a number to indicate a negative amount.
- If the option, Summarize Amounts is selected, the report may not return any information due to debits/credits are considered detailed amounts.





Additional Tips

Filter	Item	Operator	Criteria 1	Criteria 2
Include Funds 02 and 03 only	Fund Code	Between	02	03
Exclude Funds 02 and 03 only	Fund Code	Not Between	02	03
GL Codes beginning with 5	GL Code	Like	5%	n/a
GL Codes not beginning with 5	GL Code	Not Like	%5	n/a
GL Codes beginning with 5, any number in second position, followed by 234	GL Code	Like	5_234	n/a
GL Codes not beginning with 5, any number in second position followed by 234	GL Code	Not Like	5_234	n/a





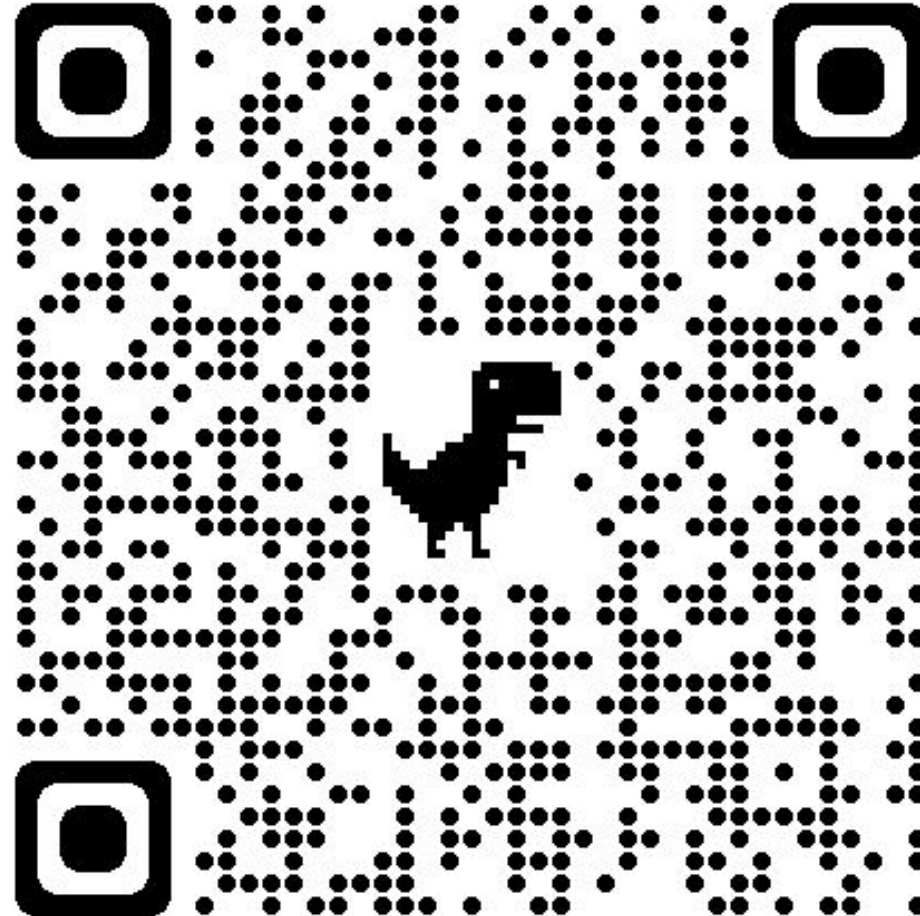
Additional Tips

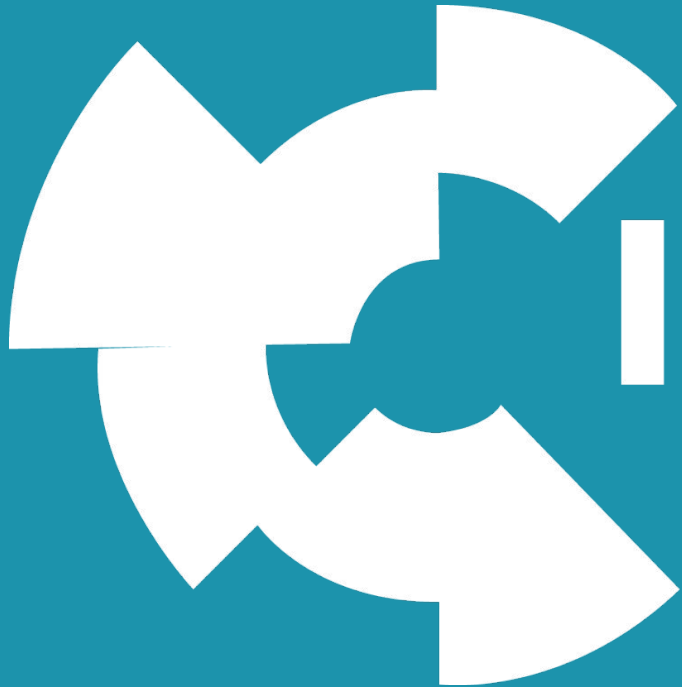
- Reports can be open multiple times, so more than one report can be set up and/or printed at the same time.
- By default, the Clear Fields on Save option is selected on the Options>Customize Workstation Settings>Preferences tab. When you are running reports, you may want to clear this option. If you do not, each time you save the report, you will need to reselect the Report Name from the drop-down list on the Setup tab.
- When processing very large reports, select the "Generate Large Reports to Disk Before Viewing or Printing" option using the Options>Customize Workstation Settings>Reports tab. The reports are temporarily stored until closed, instead of using up memory.
- If you change printers, the orientation of your existing reports may need to be changed. For example, if you have a report setup with an orientation of landscape, and you install a new printer, the next time you run the report, you may need to reset the orientation from portrait back to landscape.



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