What is Variable Personalization?

- It allows users to save the same filter criteria for reports that use the same *Variable*(s)
- Once filters are set, it pre-populates report filter criteria for that *Variable*(s)
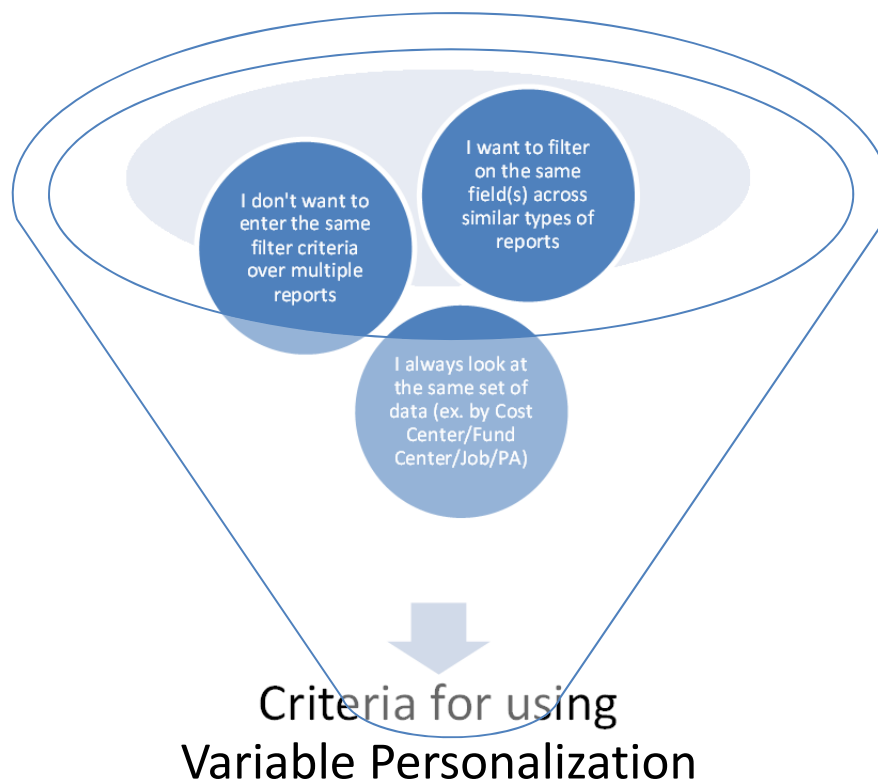
Why would I want to use Variable Personalization?

- It can be a time saver if you ALWAYS want to view specific filter criteria everytime you run a specific report(s)
  - For example *FM010 Budget Availability* and *FM012 Transactional Detail - Site Admin* use the same variables for *Fiscal Year*, *Fund*, and *Program*. *Variable Personalization* can help if you only want to view a specific *Fiscal Year*, *Fund*(s), or *Program*(s)
- It is allows users to quickly personalize multiple reports (with the same variable) at the same time

What if I want to remove Variable Personalization? Is it an easy process?

- Yes. Removing *Variable Personalization* is easy. Click on *Show Variable Personalization*. Under *Personalized Variables* select the fields to be removed or use the double arrows to remove all fields.

Things to remember when using **Variable** Personalization

- When creating a **Personalized Variable** remember to check *Show Personalized Variables*. That way if you've created a Personalized Variable, affected reports will display a message, "One or more variables are personalied; click *Show Variable Personalization* link to display them."
- When in doubt, click on *Show Variable Personalization* to display *Personalized Variables*

I don't want to enter the same filter criteria over multiple reports

I want to filter on the same field(s) across similar types of reports

I always look at the same set of data (ex. by Cost Center/Fund Center/Job/PA)

Criteria for using
Variable Personalization

Variable Entry

Available Variants: [▾] Save | Save As... | Delete   Show Variable Personalization

General Variables

	Variable⇕	Current Selection	Description
*	Fiscal Year		
	Funds Center Hierarchy FM (Multiple Single V		
	Fund		
	Division		
	Fund Center Category		
	Program		
	Grant		
	Commitment Item (Selection, Optional)		

OK | Check

Click on Show Variable Personalization link to open Personalized Variables and add/remove filter criteria

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Variable Entry

☑ One or more variables are personalized; click Show Variable Personalization link to display them

Available Variants: [▾] Save | Save As... | Delete   Show Variable Personalization

General Variables

	Variable⇕	Current Selection	
	Funds Center Hierarchy FM (Multiple Single V		
	Fund		
	Division		
	Fund Center Category		
	Program		
	Grant		
	Commitment Item (Selection, Optional)	100000 - 799999	100(

OK | Check

Message displayed if *Personalized Variables* created AND *Show Personalized Variables* checked

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Variable Entry

Available Variants: [▾] Save | Save As... | Delete   Hide Variable Personalization

General Variables

	Current Selection	Description
Grant		
Commitment Item (Selec... l)	100000 - 799999	100000 - 799999 Project Plan & Bgt

▾ ⤓ ▴ ⤒

Personalized Variables

Personalize Changed Values | Retrieve Personalization

	Variable⇕	Current Selection	Description

☐ Show Personalized Variables

OK | Check

Personalized Variables opens after you click on the *Show Variable Personalization* link

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Variable Entry

Available Variants: [▾] Save | Save As... | Delete

General Variables

	Variable⇕	Current Selection	Descri
*	Fiscal Year	2015	
	Funds Center Hierarchy FM (Multiple Single		
	Fund		
	Division		
	Fund Center Category		
	Program		
	Grant		
	Commitment Item (Selection, Optional)	100000 - 7999	

▾ ⤓ ▴ ⤒

Add selected variables to pe

Personalized Variables

Personalize Changed Values | Retrieve Personalization

	Variable⇕	Current Selection	Description

☐ Show Personalized Variables

OK | Check

To add filter criteria to *Personalized Variables*, enter filter criteria, click on field (highlight), click on single down facing arrow. Or click on double down facing arrow to add all filter criteria.

Variable Entry

Available Variants: [▾] Save | Save As... | Delete   Hide Variable Personalization

General Variables

	Variable⇕	Current Selection	Description
	Funds Center Hierarchy FM (Multiple Single		
	Fund		
	Division		
	Fund Center Category		
	Program		
	Grant		
	Commitment Item (Selection, Optional)	100000 - 799999	100000

▾ ⤓ ▴ ⤒

Remove all variables from personalized variables list

Personalized Variables

Personalize Changed Values | Retrieve Personalization

	Variable⇕	Current Selection	Description
*	Fiscal Year	2015	2015

☐ Show Personalized Variables

OK | Check

To remove all *Personalized Variables* click on double up facing arrows. To remove specific *Personalized Variables*, click on field to select (highlight), click on up facing arrow.