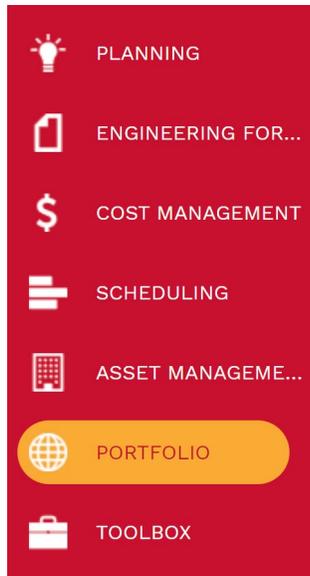




## **PMWeb Quick Reference**

### **BI Reporting**

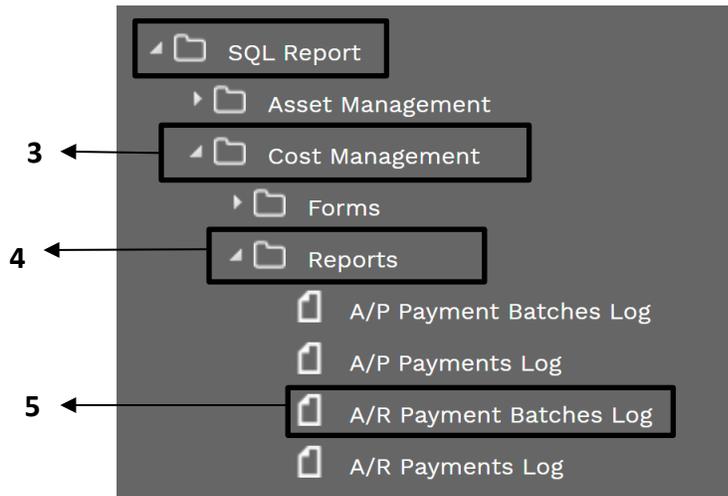
1- Click on **Portfolio** from the buttons on the left.



2- Under **Reports**, select **BI Reporting Center**.



- 3- Select the type of **SQL report** from the Report Manager. Example: Cost Management
- 4- Select the **Record type**. Example: Reports
- 5- Select the **Report type**. Example: Budget Detail Worksheet.



- 6- Select **Printing Setup** in the header to create a reoccurring report and click on save button. Do nothing if not a reoccurring report.

GENERAL
PRINTING SETUP

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Report  SCHEDULE

Associate With Record T...  Schedule This Report

Make This the Default Report For the Selected Record Type

REPORT PARAMETERS

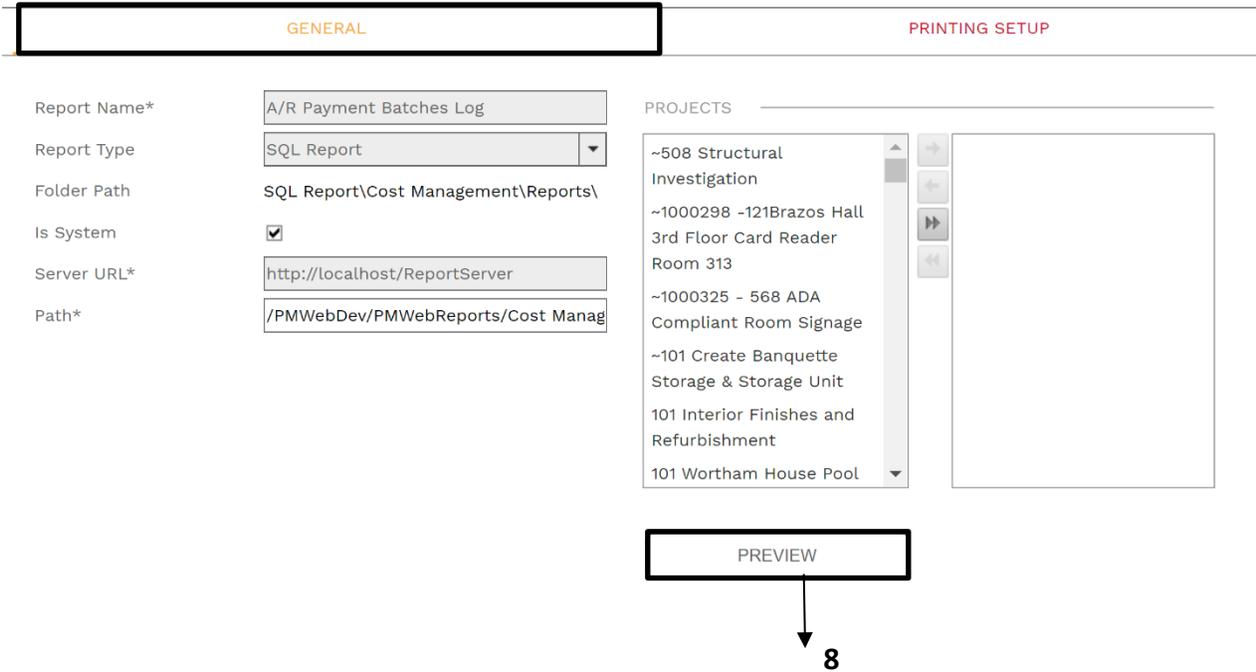
| NAME        | PMWEB FIELD                                | DEFAULT                                     |
|-------------|--|---|
| Program     | <input type="text" value="Program ID"/>    | <input type="text"/>                        |
| ReportTitle | <input type="text" value="(Use Default)"/> | <input type="text" value="A/R Payment Ba"/> |
| Project     | <input type="text" value="Project ID"/>    | <input type="text"/>                        |
| Groupby     | <input type="text" value="(Use Default)"/> | <input type="text" value="Project"/>        |
| Currency    | <input type="text" value="(Use Default)"/> | <input type="text"/>                        |

SAVE

↓

6

- 7- Re-Select the **General** tab.
- 8- Select the **Preview** button.



- 9- Select the **View Report** on the top right of the screen.
- 10- Select the disk arrow button  in the middle of the page
- 11- Select the document type for the report.



12- Process Complete.