

## How to create a custom report



TOMORROW BEGINS TODAY

**NatWest** 

From the main dashboard go to "Reports":

										Sign-In: 04 October 2		
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## Select Custom Reports:

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## To create a new report select "New"

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Standard Rep	orts	Custom Reports		0
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Once the report has loaded click on the icon below to bring up the options:

N Report Define the report below and press "Run Query", in the top right corner of the page to continue.			Expe	and Clo
File $\square \lor \boxdot \checkmark \boxdot \blacksquare \lor \blacksquare \lor \blacksquare \lor \blacksquare \cdots$ $\square \lor \blacksquare \lor \blacksquare \cdots$ $\square \lor \blacksquare \cdots$			S 🗎 Des	ign 🗸
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Report 1				

## Select "Add Query"

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Add Query		
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Then double click on "Universe":

Select a Data Source					
SAP BI Platform R Browse resources from y repository	epository your enterprise		Universe Select a universe as a data source		
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Select "TPMastr":

Select a Universe					
Folders List					
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Select the options you wish to see in the report from the list on the left and drag to the right side under either 'Result Objects' or 'Query Filters'.

	Query Panel	
Add Query	0 🔅 🗊	
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Master perspective       ✓         Type here to filter the tree       Q       注       ビ         ✓       TPMastrNWG       ✓       ✓         ✓       Instruments       ✓       ✓         ✓       Bank Name       ✓       ✓         ✓       Ø       Corporate Customer Name       ✓         ✓       ∯       Bank Group Name       ✓	Result Objects $\overline{V}_+ \times \overline{\mathbb{D}}$	$\leftarrow \rightarrow$
Originating Bank Reference Related Instrument ID Related Instrument Type Instrument ID Instrument ID Instrument Type Se Instrument Type TPS Purpose Type TPS Tenor Category Customer Reference Numb Client Bank Instrument ID	Query Filters       Image: Constant         Image: Constant       ✓         Constant       ✓         Value(s) from list       Prompt         Object from this query       Result from another query	

'Result Objects' will give you the criteria which will appear in your report. For example, if you select 'Transaction Type', 'Transaction Start Date' and 'Transaction Currency', then these will be the three sets of data that appear on your report.

'Query Filters' allows you to filter your 'Result Objects' so that only certain subsets of data will appear. For example, if you select 'Transaction Type' as your 'Result Object' and then select 'Transaction Type' and add this to 'Query Filters' this allows you to filter the report so you only see the transaction(s) you wish to see on the report. To do this, select the three lines as outlined below and then 'Value(s) from list'. This will then bring up a list of all the transaction types for you to select from.

Once you are happy with the selected options and criteria, click on "Run"

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Re	Add Query				
	now you want to include the data from the sert a table in a new report a table in the current report and the result objects in the document		a table		

The box below will then appear once completed running, click "Ok":

The finished report will then appear like the below:

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	Â	✓ Dimensions
Transaction Type		<ul> <li>✤ Transaction Sequence Numbe</li> <li>✤ Transaction Start Date</li> </ul>
		🛞 Transaction Type

You can click on the disc icon to save your report, so that you can run this report in the future.