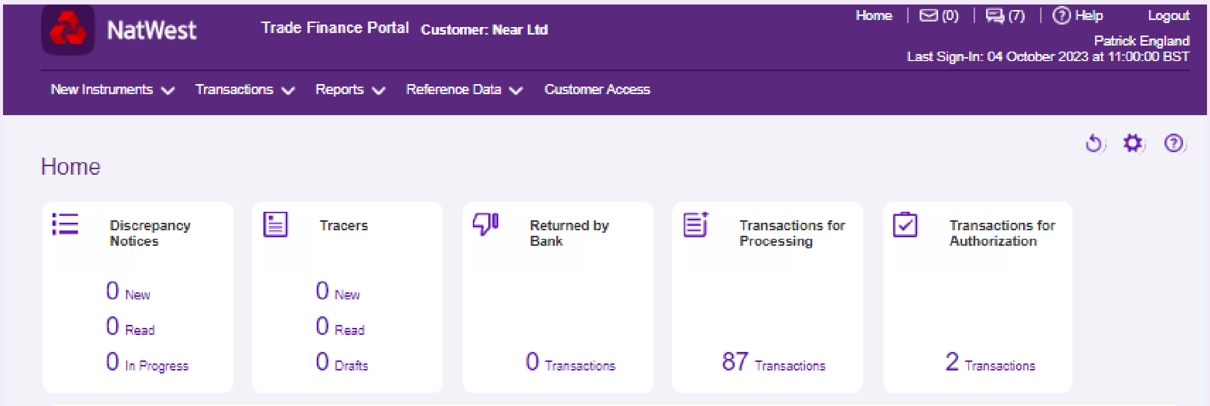
How to create a custom report

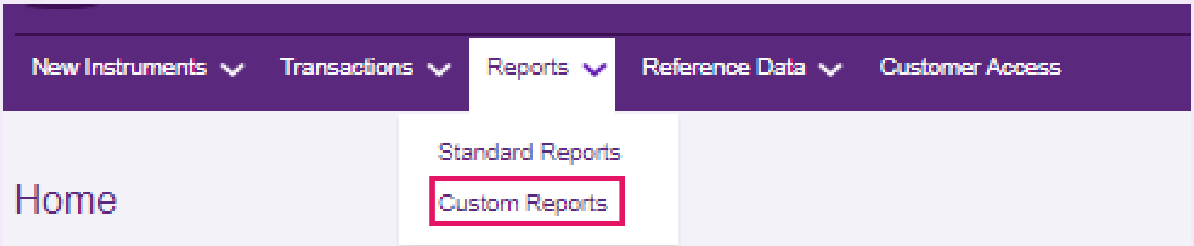
TOMORROW BEGINS TODAY

NatWest

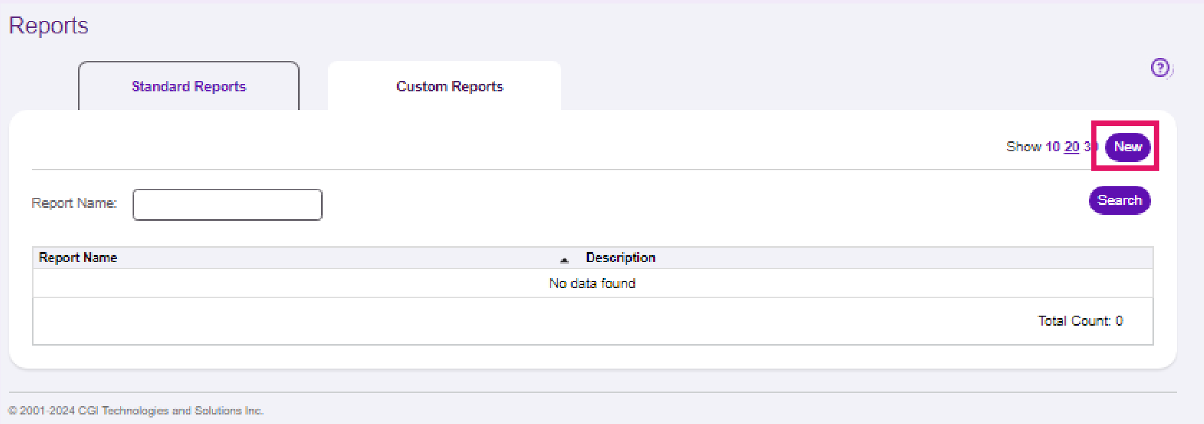
From the main dashboard go to “Reports”:



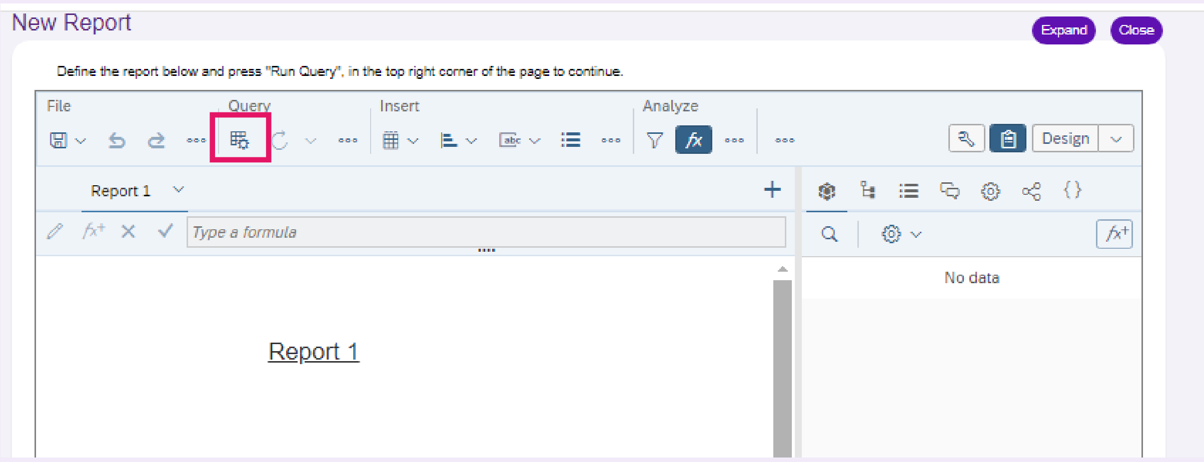
Select Custom Reports:



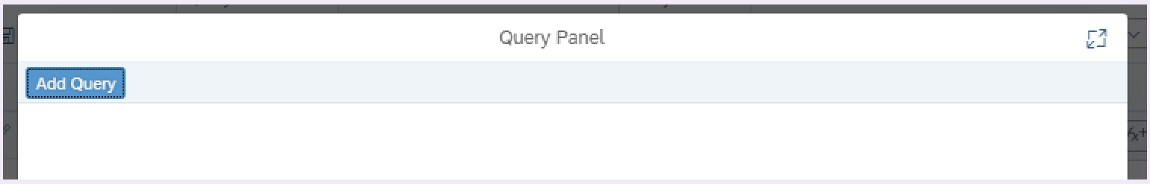
To create a new report select “New”



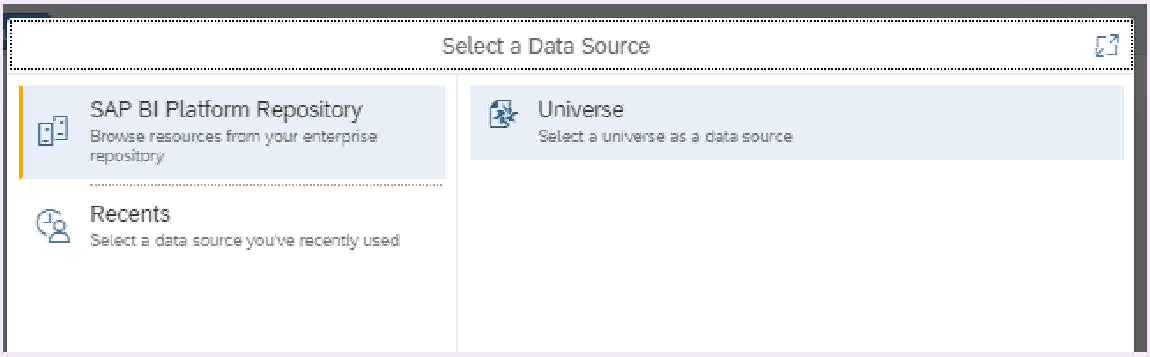
Once the report has loaded click on the icon below to bring up the options:



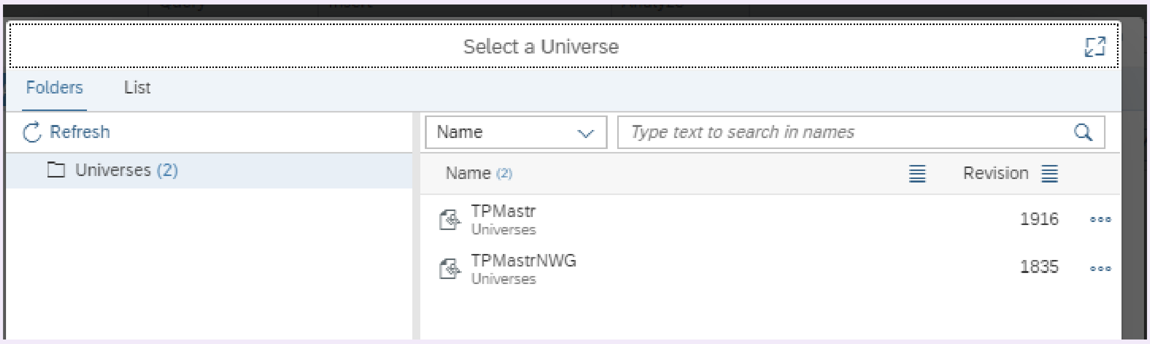
Select “Add Query”



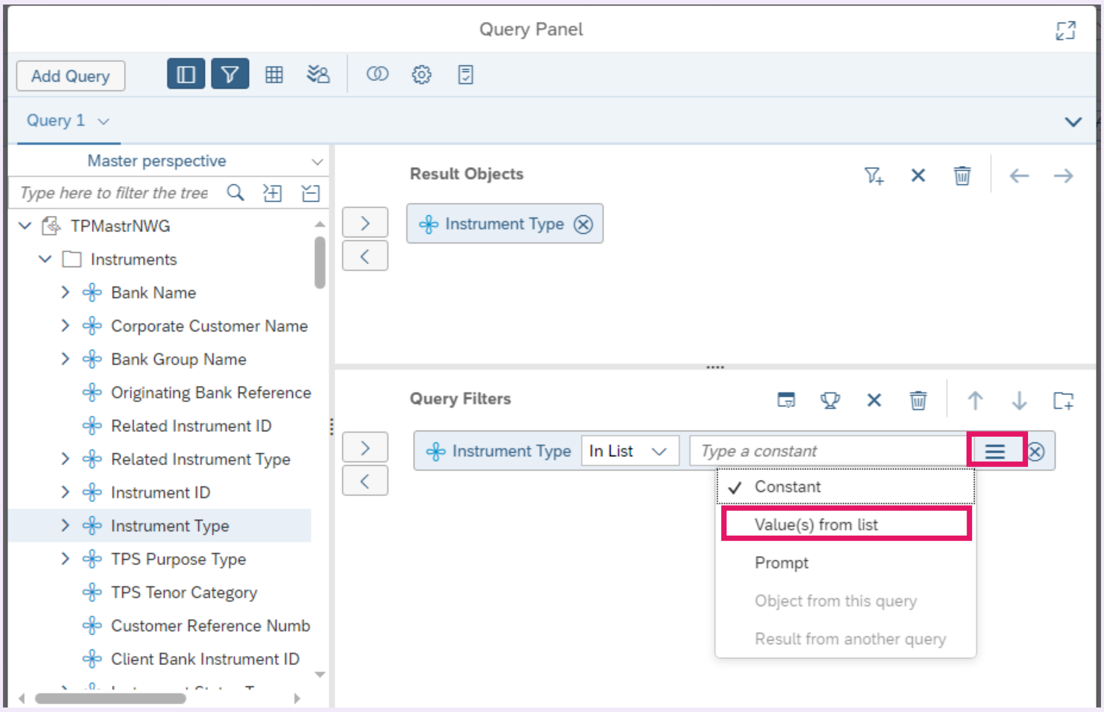
Then double click on “Universe”:



Select “TPMastr”:



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’.

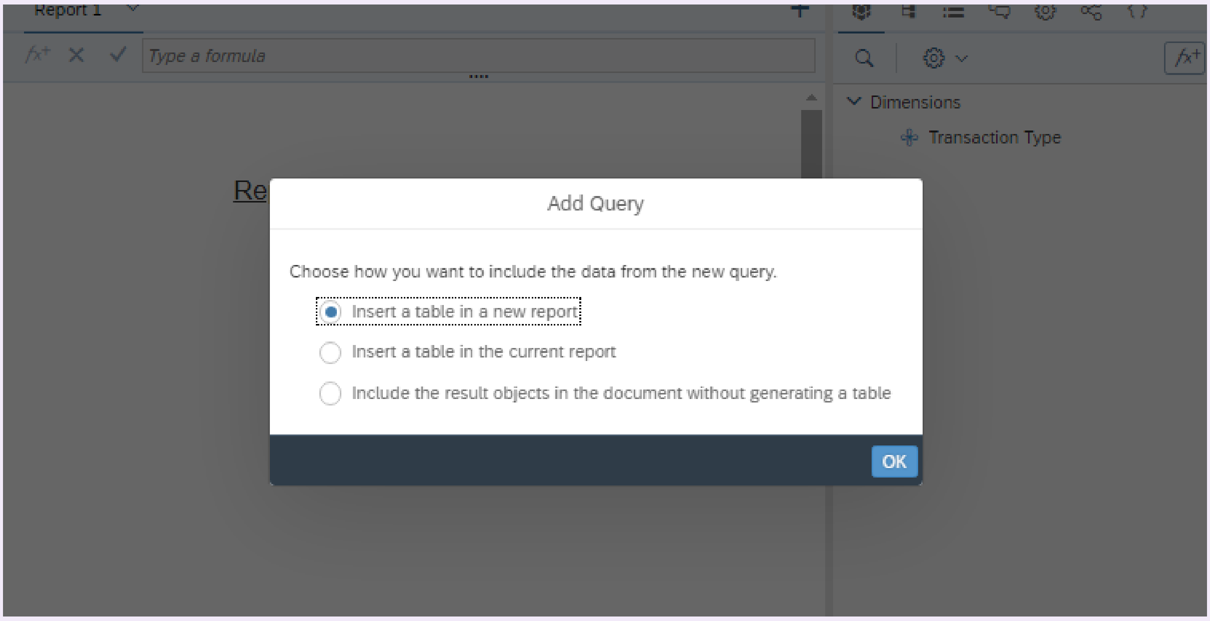


‘Result Objects’ will give you the criteria which will appear in your report. For example, if you select ‘Transaction Type’, ‘Transaction Start Date’ and ‘Transaction Currency’, then these will be the three sets of data that appear on your report.

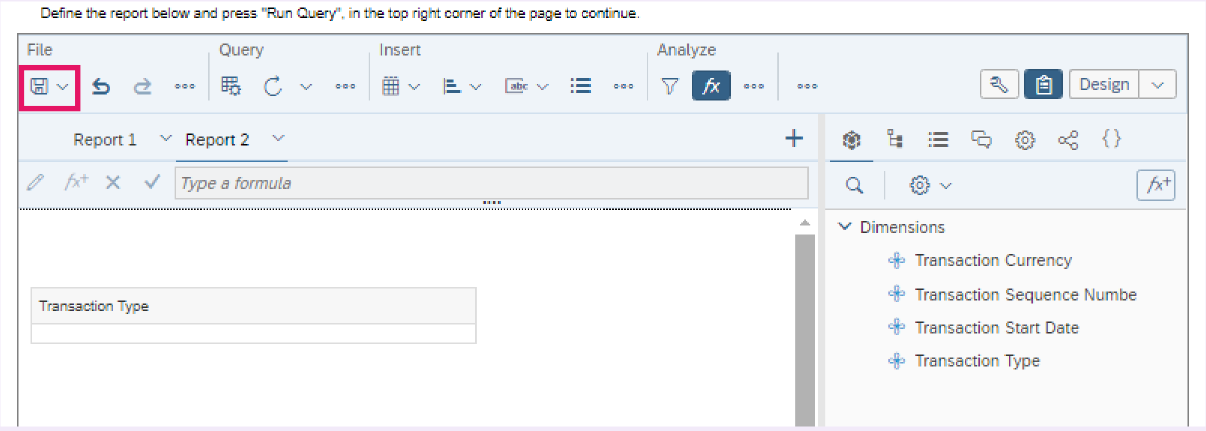
‘Query Filters’ allows you to filter your ‘Result Objects’ so that only certain subsets of data will appear. For example, if you select ‘Transaction Type’ as your ‘Result Object’ and then select ‘Transaction Type’ and add this to ‘Query Filters’ this allows you to filter the report so you only see the 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”

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



The finished report will then appear like the below:



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