AMP User Manual
Reports

AMP's reporting capabilities are designed to allow you the ability to create various types of customized reports that organize data in the way you need it presented.

It is worth noting that although there are some similarities between the way reports and tabs are created and the information they can show, tabs are not reports. Tabs should only be used to quickly find projects and for quick overviews of overarching project data. Reports should be used for developing extensive research and analysis information.

Standard Reports

The Standard report is used as a way to get an overview of Donor Funding. Listed below are some basic features of a Standard Report:

- There can be a maximum of three report hierarchy levels that can be selected for a report.
- It is not required that the donor type or donor group be a required column in the report.
- This type of report is best used for hierarchies, as they are the most flexible hierarchy reports in AMP. There are no restrictions on the combination of the hierarchies that can be selected.
- The measures that can be chosen for all reports are Actual Commitments, Actual Disbursements, and Total Commitments. For a simple report with no hierarchies, the report displays totals for all the activities.
- For hierarchy reports, there are subtotals per hierarchy and a grand total for all activities under all hierarchies.

Creating a Report

Once you understand the characteristics involved with the creation of each report, the next step is to use the Report Generator to create your customized report. From the Report submenu, choose the option Report Generator. The process of creating a report looks the same visually as the process for creating a tab.

However, there are some fundamental differences when it comes to creating a report. So, be sure to pay attention to the following steps associated with creating a custom report.

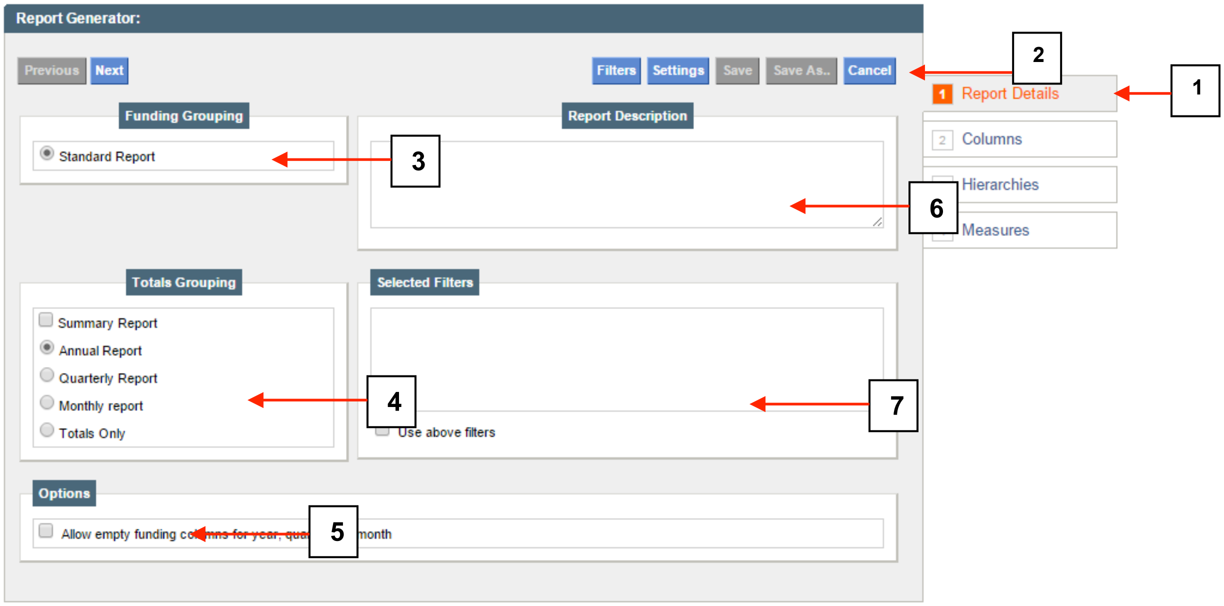


Figure 1: Create a report

1. The tabs used when creating a custom report. The currently selected tab appears in a dark color, the tabs that are available to be clicked on appear in blue and tabs that are not activated appear in gray until they become active. The tab generator follows the same step-by-step process as the other generators in AMP.
2. The controls available for the custom reports have the same operation as those used by custom tabs.
3. Funding Grouping allows you to choose the type of report you will create. The definition of each type was outlined earlier in this section.
4. The totals grouping allow you to determine how totals are grouped.
    a. **Summary** Report shows only subtotals and totals without showing individual activities
    b. **Annual** Report groups information annually
    c. **Quarterly** Report groups information on a quarterly basis
    d. **Monthly** Report groups information monthly
    e. **Totals Only** show the totals without subtotals
5. Options allow you determine whether to show funding columns that have no data or to keep them separate.
6. Report Description allows you to attach a description to the report.
7. Selected Filters let you include filters that specify the data to be shown from the report.

Steps to Create a Report

The report generator is a four-step wizard. You can navigate through the wizard by clicking previous and next or by clicking the tabs on the right-hand side.

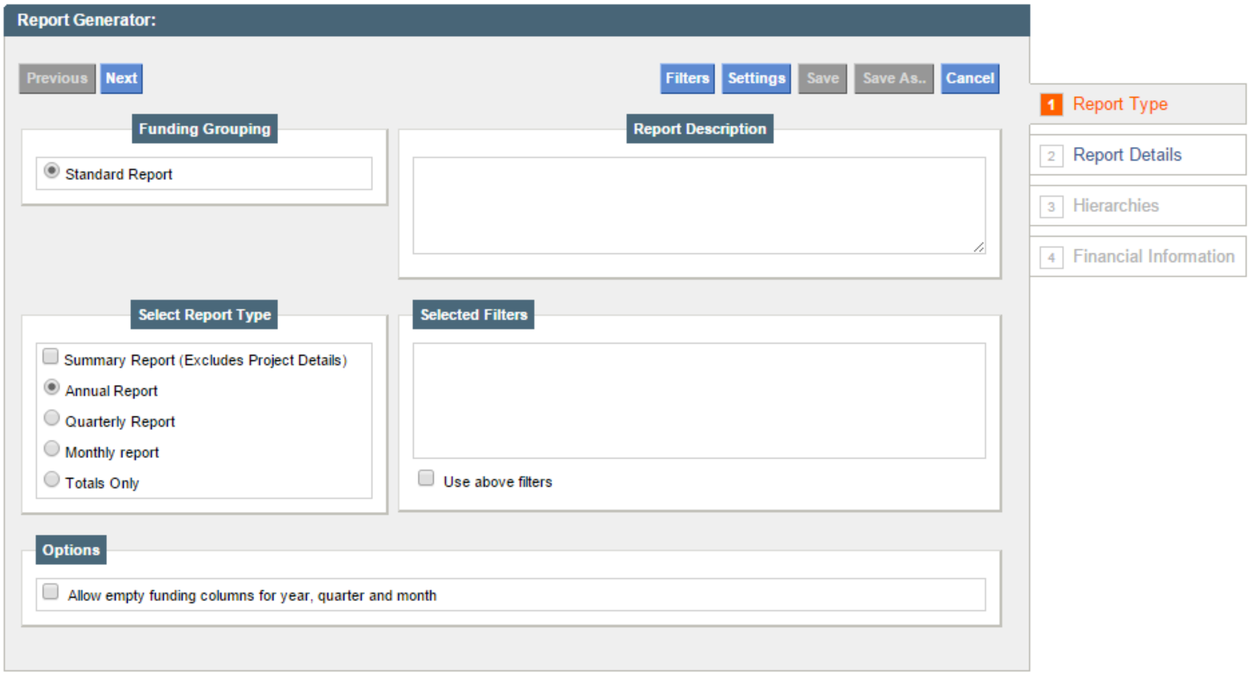


Figure 2: Report Details

Report Type - Fill in the report description and select the criteria for grouping the funding. If you would like the report to present aggregated data select the "Summary" options. There are four types of reports that can be created namely Annual, Monthly, Quarterly and Totals only. These types indicate disaggregation of funding in the report.
Once the details have been entered, please go to Step 2 of the wizard to set the columns that will be included in the report.

Columns (Required) - Select the columns you wish to be displayed on the report and click the corresponding arrow or drag the option to the corresponding side. The columns follow as much as possible the same classifications as the activity form. You can search for a column by typing the keyword in the search box and clicking on the Search button. The matching text will be highlighted in red.

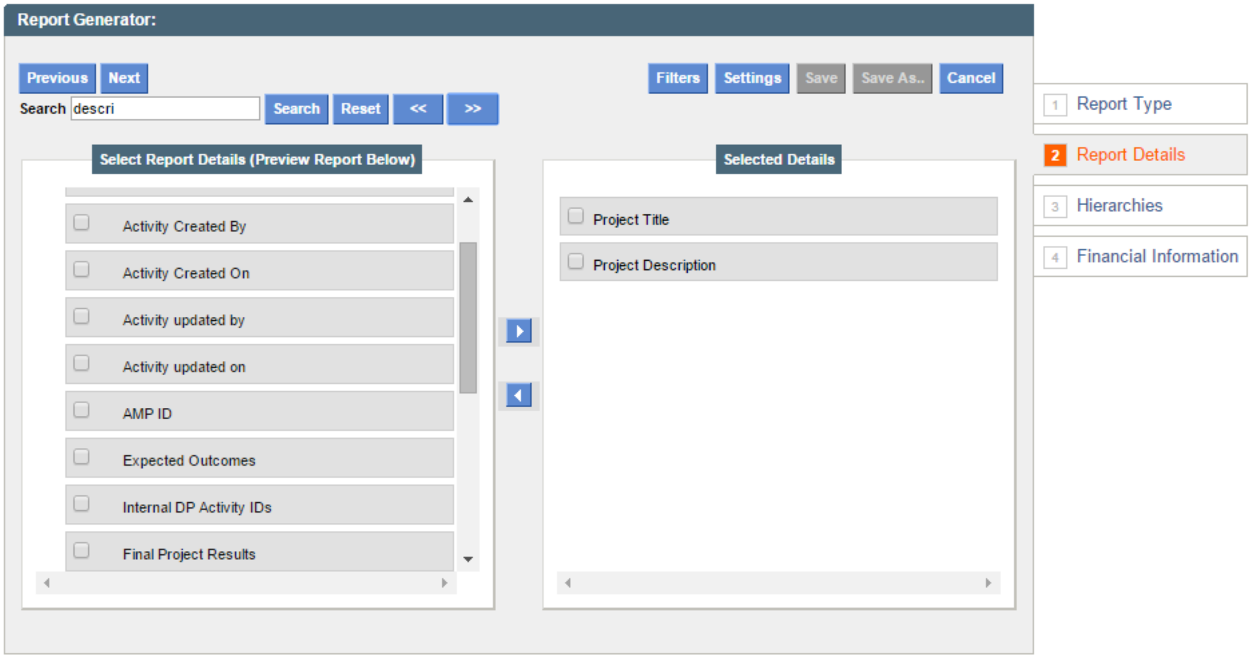


Figure 3: Report Columns

Hierarchies (Optional) – Select columns to add to the hierarchy and click the corresponding arrow or drag and drop the columns. The available row/hierarchy options represent a grouping of project information based on the columns selected in the Columns step, e.g. if you select Sectors in the list of Columns it will appear as an option for selection in the Hierarchies list.

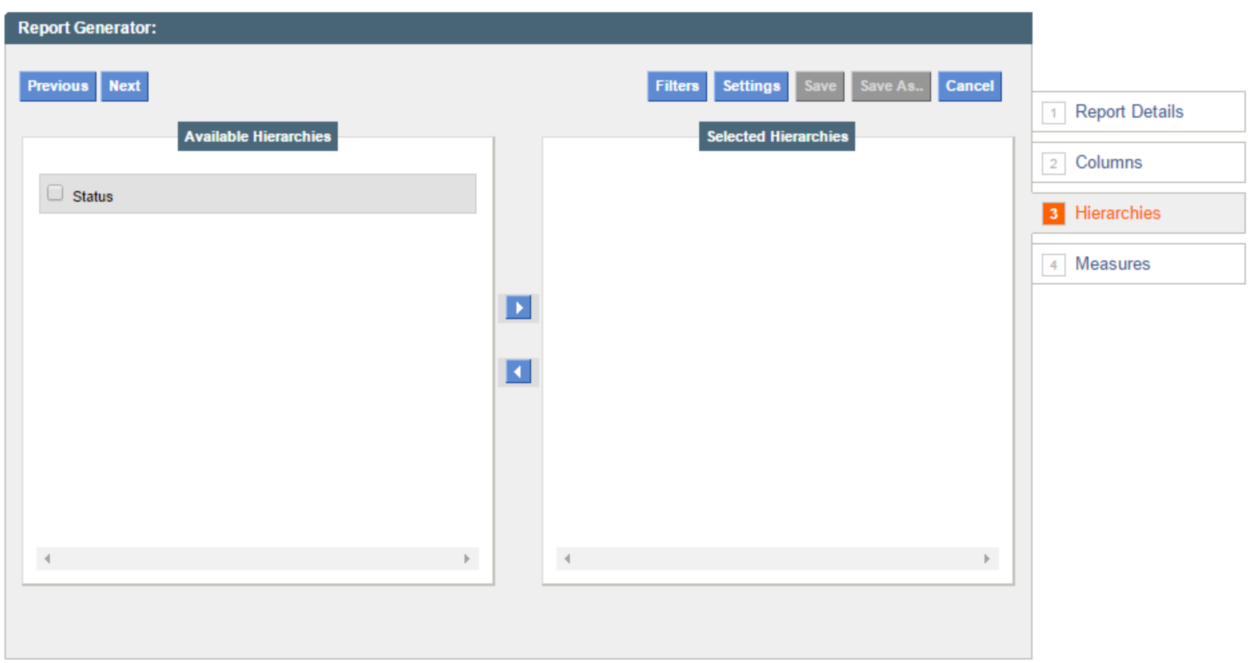


Figure 4: Report Hierarchies

Measures (Required) – Select the funding measures on the final step and hit save and enter a report title. A report cannot be saved without selecting at least one column on step 2 and one measure on step 4.

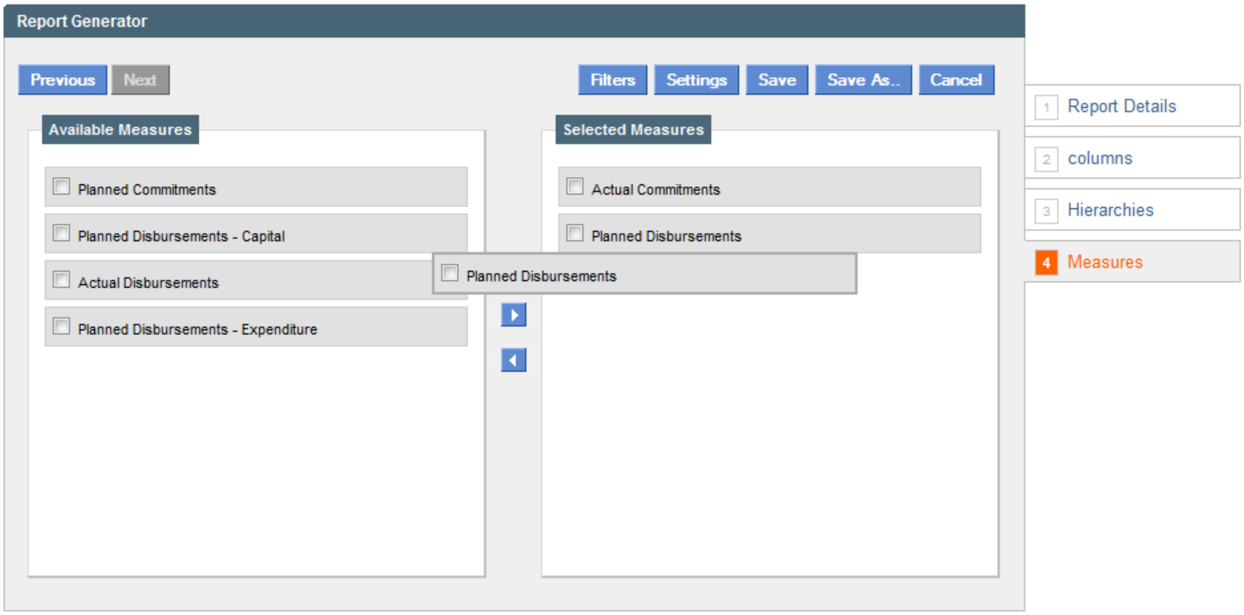


Figure 5: Report Measures

Filters (Optional) – If you would like obtain a filtered output in your report click on the Filters Icon in the generator. This brings up a filter popup with various tabs with different filtering criteria. Apply the filter of your choice and hit Apply Filters.

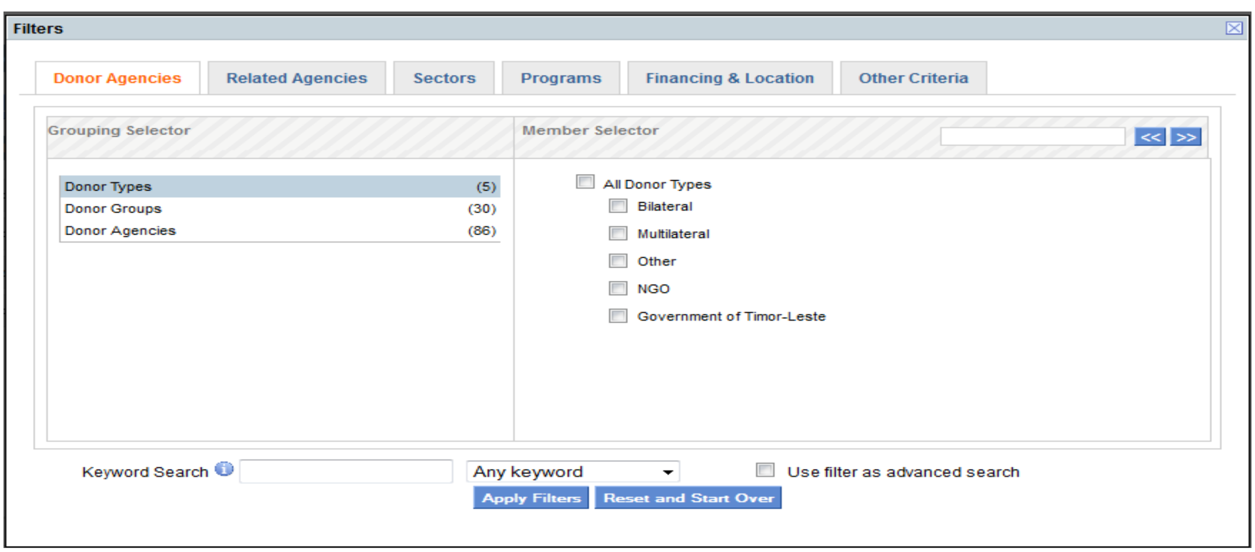


Figure 6: Report Filters

Report Preview – As you create the report you can scroll down the page to see a preview of the report.

Project Title	2007	...	2010	Total Cost
	Actual Commitments	Actual Commitments	Actual Commitments	Actual Commitments
Report Totals:	**2 000**	**2 000**	**2 000**	**20 000**
Project Title 1	1 000	1 000	1 000	10 000
Project Title 2	1 000	1 000	1 000	10 000

Figure 7: Report Preview

Viewing a Report

Once you create a report, accessing the report you created can be done by clicking the Reports option on the main menu to open the main reports page. Here you will see a listing of all reports you have created. To open a report, click the name of the report. The other options for the report, including editing and deleting, work the same as the functionality we learned for the creation of desktop tabs (see Desktop Tabs for more information).

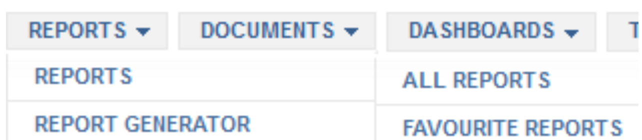


Figure 8: Accessing reports from My Desktop

When you click on All Reports, you will be accessing the list of all reports available in the workspace as shown in the following image.

Please note that if you are a regular team member, you will only be able to see the reports that you have created and the ones made public by the team leader.

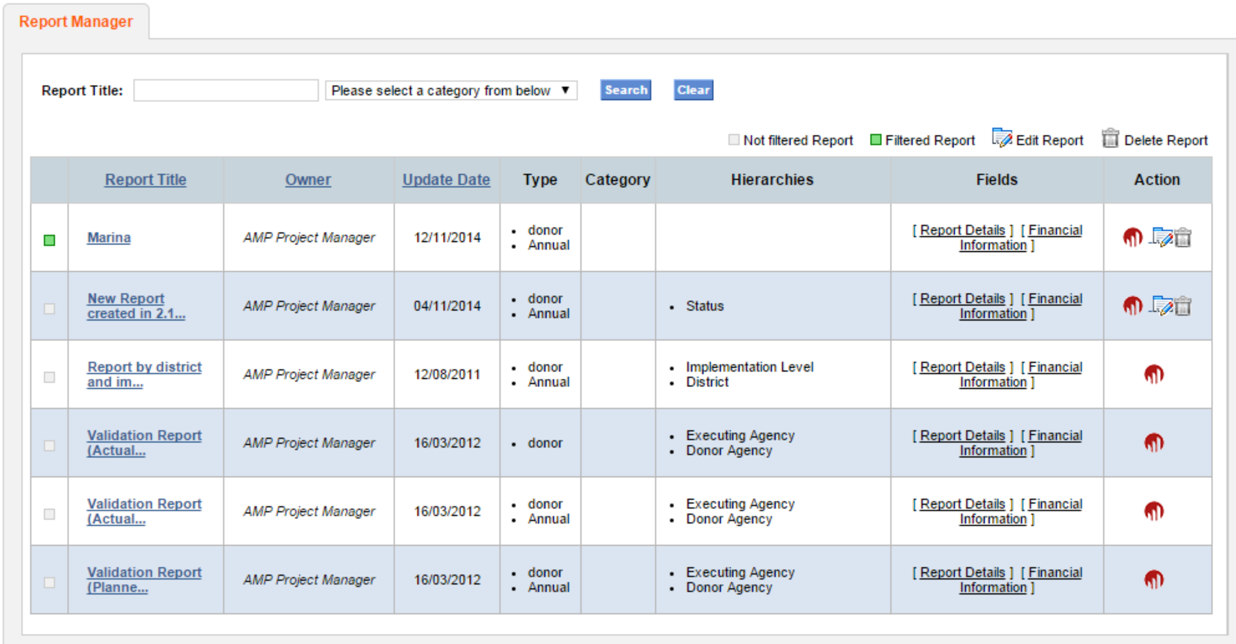


Figure 9: Report List

Let’s take a look at the various components shown on the Report itself.

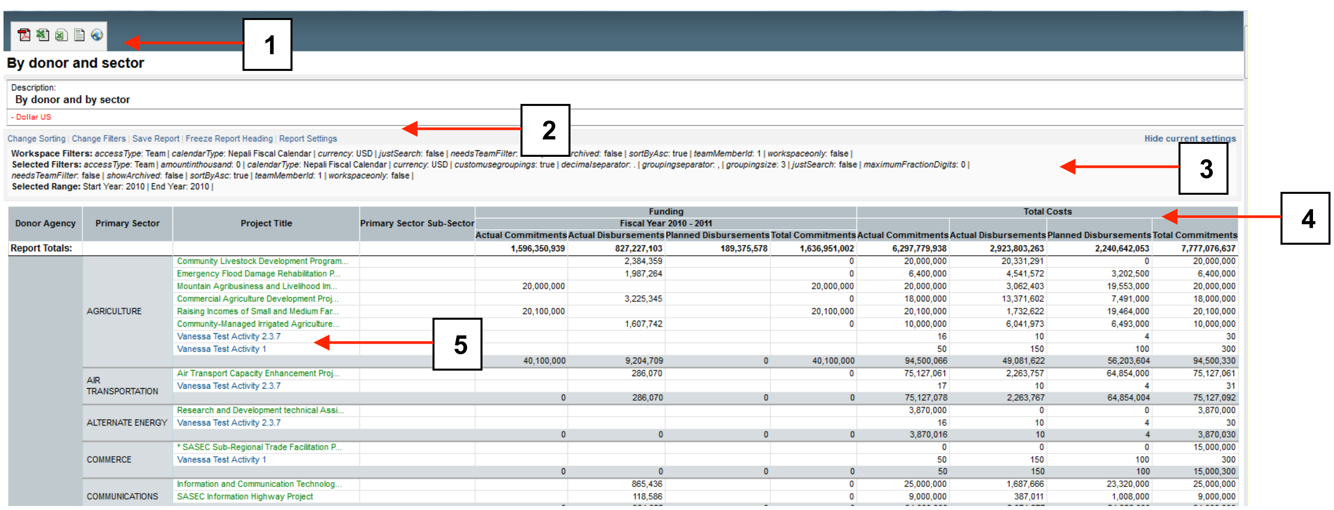


Figure 10: Report Components

1. You can export the report to PDF, Excel, Plain Excel (no hierarchies), or CSV.

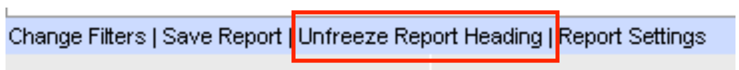
2. The submenu within the report offers various options that allow you to adjust the way the report is displayed and the data that the report shows.

   a. The Change Filters link applies a filter to the report. By default, all existing filters are already turned on and all projects appear in a report.

Filters allow you to select the types of projects you want to see in your report.

b. When you use a filter to modify the data shown on the report, you also have the option to save the report with the filter options you selected by clicking the Save Report link.

c. Clicking Freeze Report Heading allows you to keep the report headings on the screen at all times as you scroll through the report body. This is quite useful for large reports that require a lot of scrolling. When you "freeze" your report headings, you will then see an option to Unfreeze Report Heading.



Clicking this link will allow you to scroll up and down the page without seeing the header constantly at the top.

d. Report Settings offers you the option to make various changes in the layout and formatting of the report.

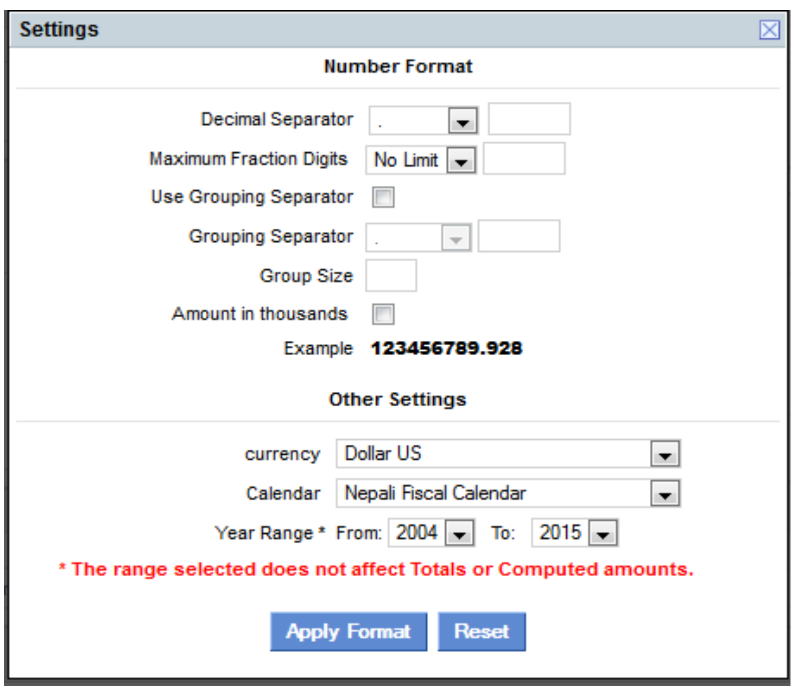


Figure 11: Report Settings

Number Format allows you to decide how numbers will display in your report. This includes the ability to include custom options for the Decimal Separator, Maximum Fraction Digits and Grouping Separator.

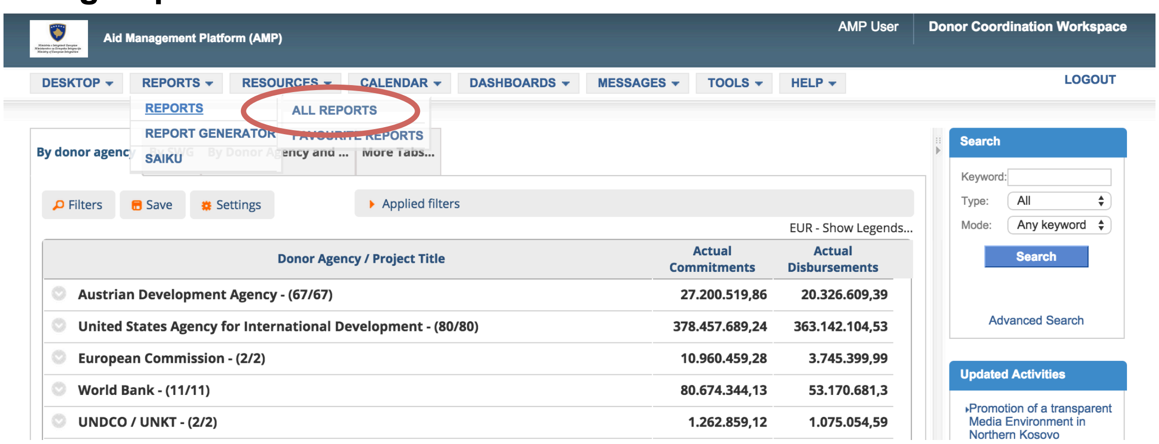
In the options for **Other Settings**, you can choose the currency to display in your report and the type of calendar that needs to be used. Additionally, the Year Range allows you to modify the range of years that appear in the report. For example, your initial report shows data from 2000 to 2015. If you are only interested in data for 2010 to 2015, you simply click the Change Range option and choose the years 2010 to 2015 and the data will now only show for those years.

3. The grey bar displays all the applied filters. This bar may be expanded or collapsed using the Show current settings or Hide current settings link to the right of the report page just above that section.

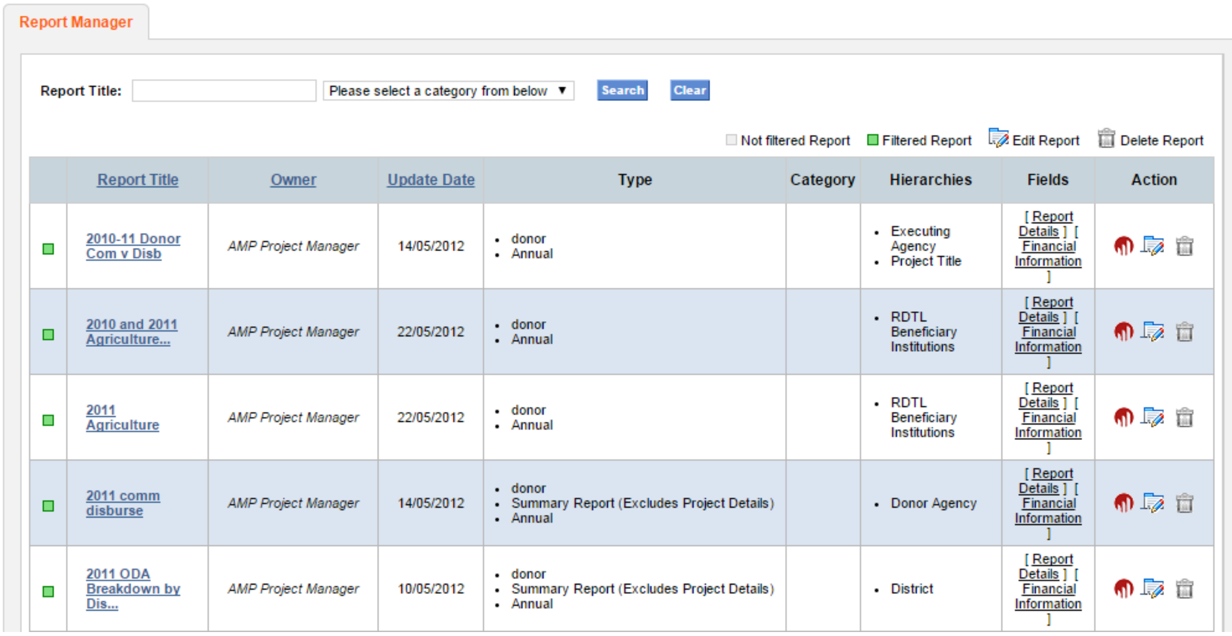
4. The **Report Totals** are the grand totals of all the amounts in a report. Hierarchy reports will contain sub totals per hierarchy.

5. You may select a particular row in the report by clicking on the row. This highlights the row with a darker shade of blue which helps you scroll horizontally and mark the activity rows he/she is interested in viewing.

Using Reports



To see the list of available reports, click **All Reports** in the Reports menu.



Here you will find a list of all of the reports your user has created. To open a report using the old report engine, click on the report name. To edit a report, click on the icon. To delete a report, click on the icon.