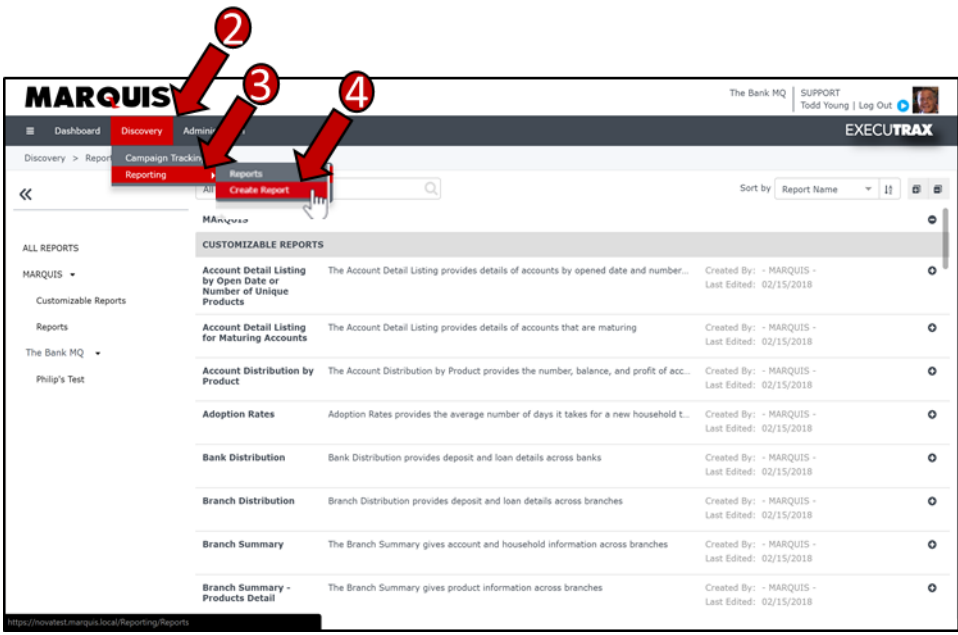
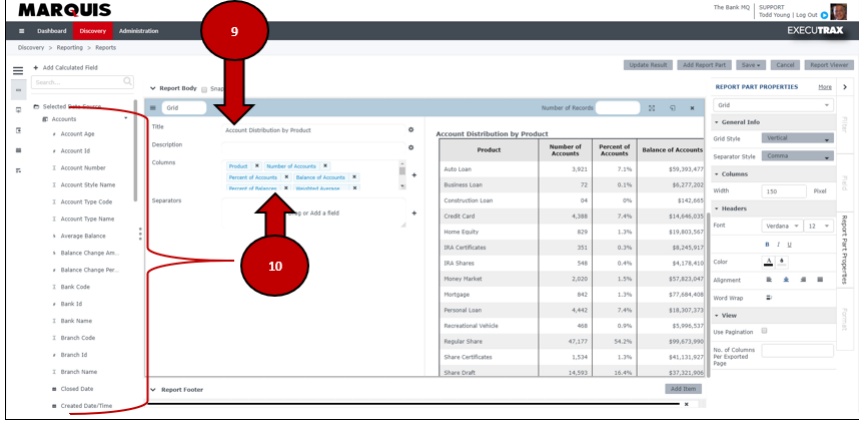



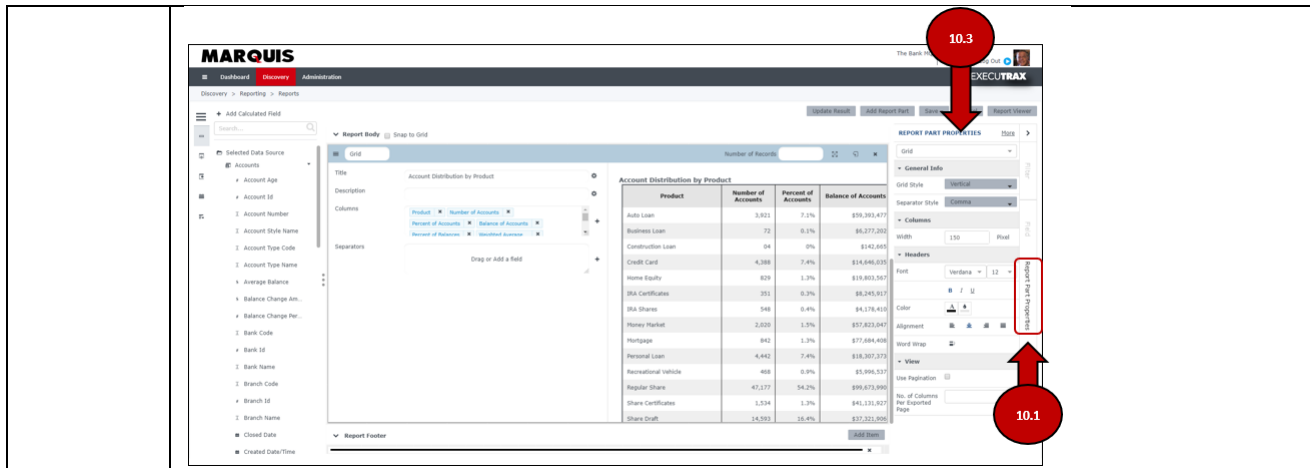
MARQUIS

MNET605	Creating a Grid Report from Scratch (DIY)
Order of Steps	Tasks
Step 1	Log into Marquis Next
Step 2	Click on "Discovery" on left side of menu bar to display drop down menu
Step 3	Hover over "Reporting"
Step 4	Click on "Create Report"
	 <p>The screenshot shows the Marquis Reporting interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Admin', and 'EXECUTRAX'. The 'Discovery' menu is open, showing 'Reporting' and 'Create Report'. The 'Reporting' sub-menu is also open, showing 'Create Report'. The 'Create Report' button is highlighted with a red arrow and the number 4. Other red arrows with numbers 1, 2, and 3 point to the 'Discovery' menu, the 'Reporting' sub-menu, and the 'Create Report' button respectively.</p>
Step 5	Select the Data Source(s) on the left side of the page by click the check box next to the data source(s)
	<ul style="list-style-type: none"> Note: Data Sources will adjust based on the data source(s) chosen
Step 6	Click Fields on the left side of the page
6.1	Select the type of Report to be built by clicking Grid
Step 7	Select the individual fields on the left side of the page by clicking the specified items and dragging them to the columns section of the Report Body
Step 8	Report Header will be set up by Marquis so no adjustments will be needed.

MARQUIS

Step 9	Report Body
9.1	Title the report <ul style="list-style-type: none"> Note: The Title that is created here will show up in the list of Widgets
9.2	Create a description for the report
	
Step 10	Click to highlight a Field name and Field Properties will show up on the right of the page
10.1	Data Source <ul style="list-style-type: none"> Field Name Field Name Alias can be changed to a name of choice
10.2	Data Formatting <ul style="list-style-type: none"> Select drop down to adjust Function Select drop down to adjust Format Impute number of Pixels to adjust width To Sort click on  Click on the gear to Sub Total Click on the gear to Grand Total
10.3	Click on the "Report Part Properties" tab on the right side of the page <ul style="list-style-type: none"> Note: "Report Part Properties" may look greyed out until it is highlighted
10.4	General Info <ul style="list-style-type: none"> Grid Style drop down - determines the style of the grid Separator Style drop down - determines style of separator
10.5	Columns <ul style="list-style-type: none"> Input numbers to adjust column width
10.6	Headers <ul style="list-style-type: none"> Select the font type, sizes, bold, italicized and underline Select the Color Adjust Alignment Word Wrap
10.7	View <ul style="list-style-type: none"> Check to Use Pagination Choose the number of Columns per export page

MARQUIS



Step 11 Click on Filters on the top left side to add filter content

11.1 Select the individual fields on the left side of the page by clicking the specified items and dragging them to the Filter section

Step 12 Adjust the Filter parameters by clicking on the number in the filter box that needs to be adjusted and Filter Properties will be revealed on the right side of the page

- Note: When adjusting one filter it will change the criteria in other filters, so adjust filter from left to right then the bottom filters

12.1 Source

- Filter Name to adjust filter variables

12.2 Filter Operator

- [Defines the parameters of the filter](#)

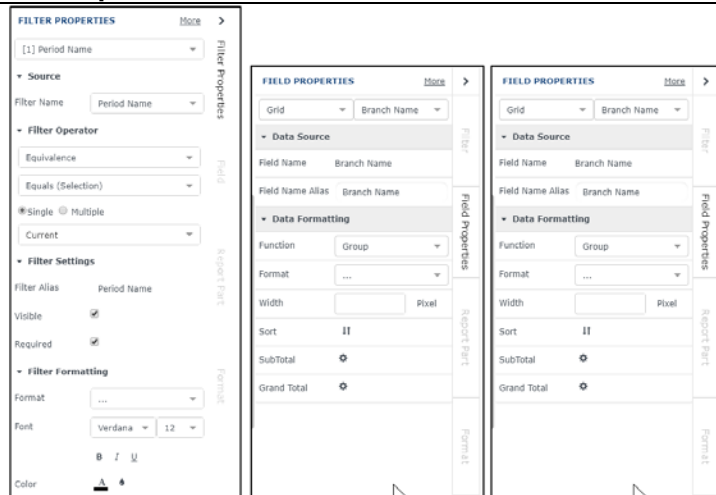
12.3 Additional Filter Settings

- Filter Alias – retitling filter
- Visible - *checkbox*
- Required - *checkbox*

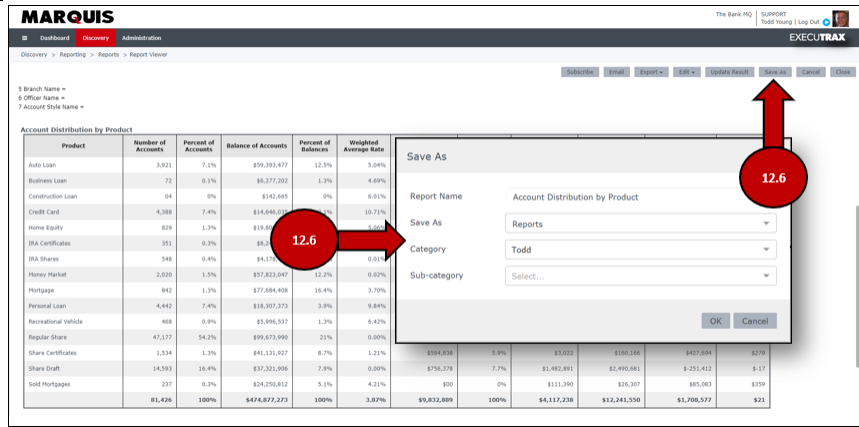
12.4 Filter Formatting

- Format
- Select the font type, sizes, bold, italicized and underline
- Select the Color

12.5 Click **“Update Results”**



MARQUIS

12.6	Click on "Save" in the top right menu
12.6.1	Enter a name in the Report Name
12.6.2	Save As - Reports
12.6.3	Category – If a folder has already been created then go to the next step. If not, enter a name to create a new category and hit enter to let the name be accepted by the system
12.6.4	Category - select the drop-down arrow to show a list of categories and select one
12.6.5	Sub-category - to create a category (folder) within a category (folder), enter a name and hit enter to be accepted by the system
12.6.6	Sub-category - select the drop-down arrow to show a list of categories and select one
12.6.7	Click "ok"
12.7	Click on "Report Viewer" in the top right menu to view the report
	 <p>The screenshot shows the MARQUIS Report Viewer interface. A 'Save As' dialog box is open, allowing the user to save the report. The dialog box contains the following fields:</p> <ul style="list-style-type: none"> Report Name: Account Distribution by Product Save As: Reports Category: Todd Sub-category: Select... <p>Red circles with the number '12.6' and arrows point to the 'Save As' field and the 'OK' button.</p>
	<ul style="list-style-type: none"> Note: After inputting Category and Sub-category click "enter" to lock the title in
12.8	The Category will show in the "All Reports" menu on the left side of the page under your institutions name
Step 13	If export/print is needed, then continue to the next sub step
13.1	Click on "Export" in the top right menu
13.2	Select type of export (Excel, PDF, CSV)
13.3	Once the document has been exported, Open, Save, Print and/or Share