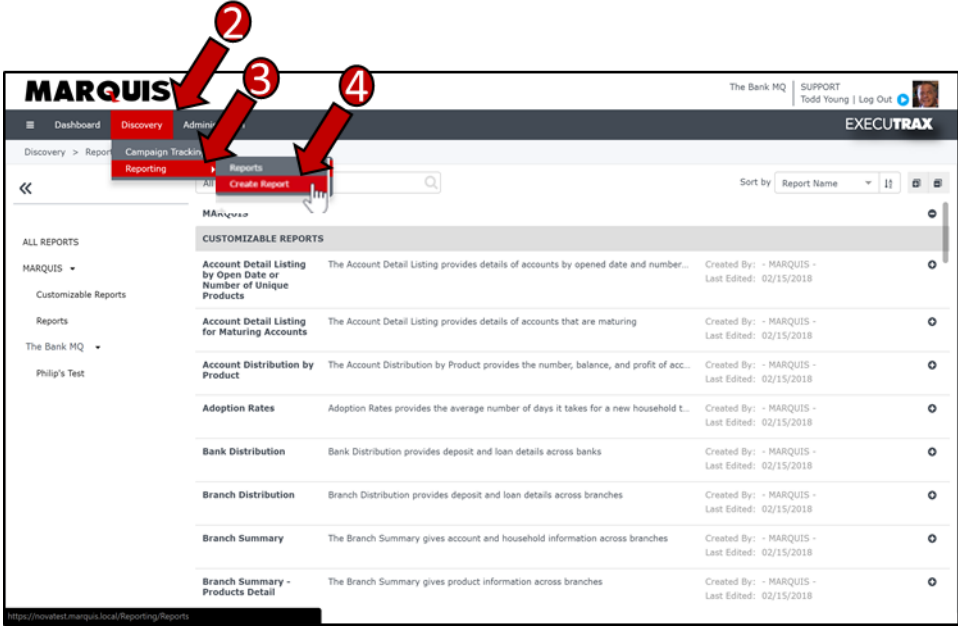
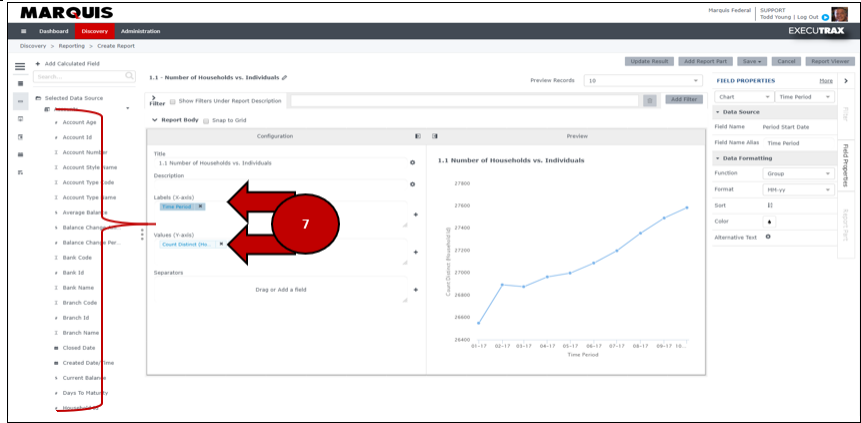

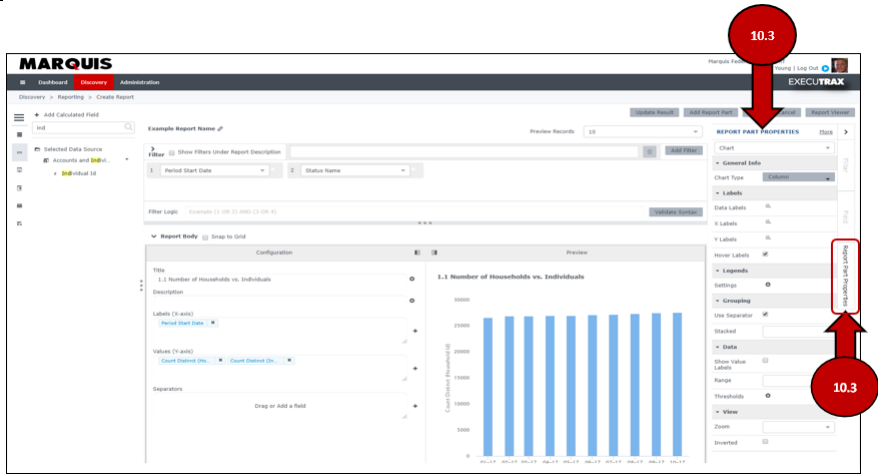


# MARQUIS

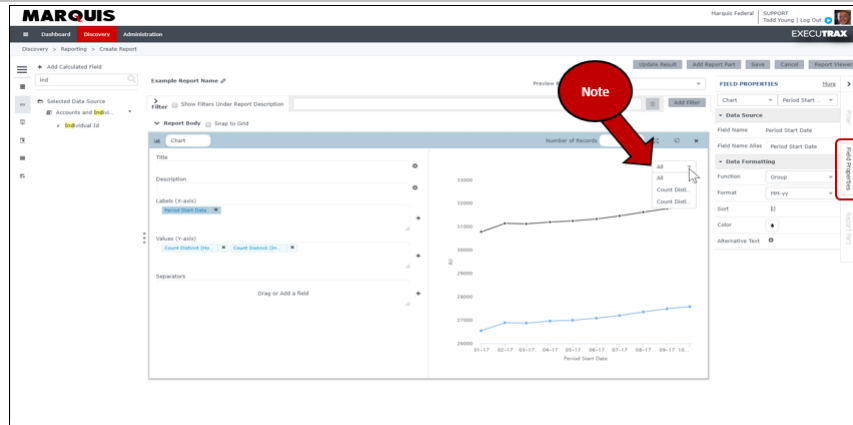
<b>MNET606</b>	<b>Creating a Graph Report from Scratch (DIY)</b>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into Marquis Next
<b>Step 2</b>	Click on <b>"Discovery"</b> on left side of menu bar to display drop down menu
<b>Step 3</b>	Hover over <b>"Reporting"</b>
<b>Step 4</b>	Click on <b>"Create Report"</b>
	 <p>The screenshot shows the Marquis Reporting interface. A red arrow labeled '2' points to the 'Discovery' menu item. Another red arrow labeled '3' points to the 'Reporting' sub-menu. A third red arrow labeled '4' points to the 'Create Report' button. The interface displays a list of customizable reports such as 'Account Detail Listing by Open Date or Number of Unique Products', 'Account Detail Listing for Maturing Accounts', 'Account Distribution by Product', 'Adoption Rates', 'Bank Distribution', 'Branch Distribution', 'Branch Summary', and 'Branch Summary - Products Detail'.</p>
<b>Step 5</b>	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"> <li>Note: Data Sources will adjust based on the data source(s) chosen</li> </ul>
<b>Step 6</b>	Click Fields on the left side of the page
6.1	Select the type of Report to be built by clicking Chart
<b>Step 7</b>	Select the individual fields on the left side of the page by clicking the specified items and dragging them to the labels (x-axis) and values (y-axis) sections of the Report Body
	 <p>The screenshot shows the Marquis Reporting configuration screen. A red arrow labeled '7' points to the 'Labels (X-axis)' field. Another red arrow points to the 'Values (Y-axis)' field. The interface displays a list of selected data sources on the left, a configuration area for the report body, and a preview of the report showing a line chart titled '1.1 Number of Households vs. Individuals'.</p>
<b>Step 8</b>	Report Header will be set up by Marquis, so no adjustments will be needed.

# MARQUIS

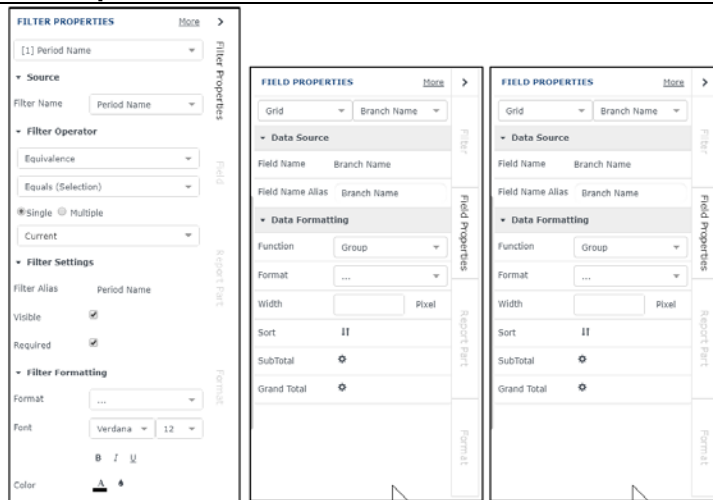
<b>Step 9</b>	Report Body
9.1	Title the report <ul style="list-style-type: none"> <li>Note: The Title that is created here will show up in the list of Widgets</li> </ul>
9.2	Create a description for the report
<b>Step 10</b>	Click to highlight a Field name and Field Properties will show up on the right of the page
10.1	Data Source <ul style="list-style-type: none"> <li>Field Name</li> <li>Field Name Alias can be changed to a name of choice</li> </ul>
10.2	Data Formatting <ul style="list-style-type: none"> <li>Select drop down to adjust Function</li> <li>Select drop down to adjust Format</li> <li>Impute number of Pixels to adjust width</li> <li>To Sort click on </li> <li>Click on the gear to Sub Total</li> <li>Click on the gear to Grand Total</li> </ul>
10.3	Click on the "Report Part Properties" tab on the right side of the page <ul style="list-style-type: none"> <li>Note: "Report Part Properties" may look greyed out until it is highlighted</li> </ul>
10.4	General Info <ul style="list-style-type: none"> <li>Grid Style drop down - determines the style of the grid</li> <li>Separator Style drop down - determines style of separator</li> </ul>
10.5	Columns <ul style="list-style-type: none"> <li>Input numbers to adjust column width</li> </ul>
10.6	Headers <ul style="list-style-type: none"> <li>Select the font type, sizes, bold, italicized and underline</li> <li>Select the Color</li> <li>Adjust Alignment</li> <li>Word Wrap</li> </ul>
10.7	View <ul style="list-style-type: none"> <li>Check to Use Pagination</li> <li>Choose the number of Columns per export page</li> </ul>
	
<b>Step 11</b>	Click on Filters on the top left side to add filter content

# MARQUIS

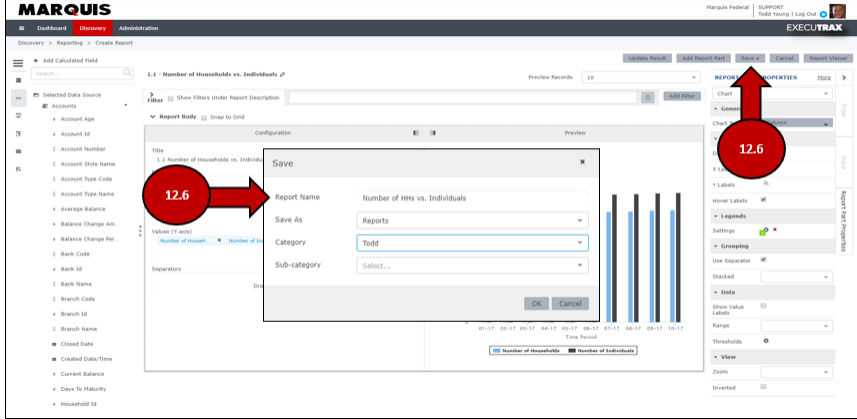
11.1	Select the individual fields on the left side of the page by clicking the specified items and dragging them to the Filter section
<b>Step 12</b>	Adjust the Filter parameters by clicking on the number in the filter box that needs to be adjusted and Filter Properties will be revealed on the right side of the page
	<ul style="list-style-type: none"> <li>Note: When adjusting one filter it will change the criteria in other filters, so adjust filter from left to right then the bottom filters</li> </ul>
12.1	Source <ul style="list-style-type: none"> <li>Filter Name to adjust filter variables</li> </ul>
12.2	Filter Operator <ul style="list-style-type: none"> <li><a href="#">Defines the parameters of the filter</a></li> </ul>
12.3	Additional Filter Settings <ul style="list-style-type: none"> <li>Filter Alias – retitling filter</li> <li>Visible</li> <li>Required</li> </ul>
12.4	Filter Formatting <ul style="list-style-type: none"> <li>Format</li> <li>Select the font type, sizes, bold, italicized and underline</li> <li>Select the Color</li> <li>Note: To display multiple “Y” values, hover over the right side of the preview screen and click all</li> </ul>



## 12.5 Click “Update Results”



# MARQUIS

12.6	Click on <b>“Save”</b> 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 <b>“ok”</b>
12.7	Click on <b>“Report Viewer”</b> in the top right menu to view the report
	
	<ul style="list-style-type: none"> <li>• Note: After inputting Category and Sub-category click <b>“enter”</b> to lock the title in</li> </ul>
12.8	The Category will show in the <b>“All Reports”</b> menu on the left side of the page under your institutions name
<b>Step 13</b>	If export/print is needed, then continue to the next sub step
13.1	Click on <b>“Export”</b> 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