

AccountView Instructions

Accessing Your Data with AccountView 1

Accessing Your Data with AccountView

To utilize the reporting features of AccountView, follow the instructions to:

- A. Download the Extract file to your client platform.
- B. Prepare the tables you want to work with.
- C. Launch the Enterprise Information System (EIS).
- D. Explore your reports.

Note: Before you use the AccountView function, you must successfully complete your daily data collections (with the process and reduce functions). \triangle

- A. Download the Extract file to your client platform.
 - 1 Launch IT Charge Manager.
 - 2 Select a site from the **Site Selection** box and press Open. Activate the PDB you want to work with.
 - 3 From the Site Administration tab, select

Manage Open Interface ► Extract Data Setup

- 4 Click the AV Extract button so that it displays AV Extract Enabled.
- 5 Using the Shift key with your cursor, highlight the customer keys you want to explore. Click OK.
- **6** From the Operation tab, select

 $Consolidate\ Data:\ Edit\ and\ execute\ the\ batch\ consolidation$

- 7 Choose the invoice period you want to consolidate and click the process option *Apply Selections and Submit Immediately*. Click OK. After the consolidation job completes, view the log by pressing Log on the upper left corner and check for a message to ensure that the file was successfully downloaded.
- 8 Close the window and return to the Operation tab. Select

Extract File Download: Copy the current extract file to your PC

Press the <u>Download</u> button next to the path for the **AccountView target extract file** in order to download the file. If there is no problem with the downloading, a message stating "Download completed successfully" will display at the top of the window.

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- 9 Exit ITCM.
- B. Prepare the tables you want to work with.
 - 1 Launch AccountView.
 - **2** From the upper toolbar, select



Verify that there is a message that says Extract file copied from ecdown.EISCON to ECCON.Cnnnnnn, where nnnnnnn is the numeric value of the unformatted SAS date on which the table was copied from ITCM Administrator to ITCM AccountView. Then, minimize the Log window.

- 3 In the AccountView window, click on Select Table.
- 4 Using the arrow to the right of the Repository field, select ECCON as the path.
- 5 Then, using the arrows in the middle of the window, select the table you saw copied (eccon.cnnnnnn) and move it from the Available list to the Selected list. When you are satisfied with your selections, click OK.
- 6 Select



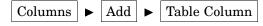
and then verify that there is a message that says "Note: Selected table copied from ECCON.Connnnnn to ECCON.CONFILE".

- C. Launch the Enterprise Information System (EIS).
 - 1 If you are running SAS Release 6.12, select



If you are running SAS Release 8.1 or later, select

- ► EIS/OLAP Application Builder
- **2** From the EIS Main Menu, double-click on the Metabase icon.
- 3 Using the arrow to the right of the **Repository** field, select **ECCON** as the path and then **YTD** Consolidation File from the list of available tables.
- 4 Select



- 5 Move the additional customer keys from Available to Selected. (This registers your additional customer key levels in the YTD Consolidation File.)
- 6 Select

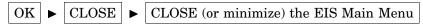


to return to the Metabase dialog.

7 Highlight the YTD Consolidation File. Select



- 8 Move the additional customer key fields from Available to Selected.
- **9** When you are satisfied, click



D. Explore your reports.

1 Select

Revenue by Customer

- 2 Double-click on a pie slice that you want to view in more detail.
- **3** Repeat this drilling down until you reach the level you want to explore, or until you reach the lowest level.

Note: Use the arrows in the upper right portion of the window to move back up through the reporting levels of the Revenue display. \triangle

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