

# SKYVU Getting Started with the Departmental Playbook: Currency Preference

Before attempting to run any reports, you must select **Ledger Currency** within your account **Preferences** in order for the financial data to display correctly. Failure to do so can result in report errors and reports with missing data. To properly set your currency:

The screenshot shows the Oracle Business Intelligence Departmental Playbook interface. The user is logged in as Sally Trainer. The interface includes a search bar, navigation tabs (Home, Catalog, Favorites, Dashboards, New), and a user profile dropdown menu. The main content area displays the Vanderbilt University logo and the title "Departmental Playbook". Below this, there are several report categories: Financials, Human Capital Management, Projects, and Procure to Pay. The Financials section is expanded, showing a list of reports under "General Ledger".

Annotations and steps:

- 1 Click your **Name** and then select **My Account** in the drop-down list.
- 2 Ensure the **Preferences** tab is selected.
- 3 Change your **Currency** setting from the default value to **Ledger Currency**.
- 4 Click **OK** to save.

The "My Account" dialog box is open, showing the "Preferences" tab. The "Currency" setting is currently set to "Ledger Currency". The "OK" button is highlighted.

**To access your reports, select the Departmental Playbook from your Oracle Home screen or Navigator.**

*\* Note: Availability of reports varies by role. If you have questions regarding report access, please reach out to your Chief Business Officer.*

**Departmental Playbook**

After running a report from the **Departmental Playbook**, you can **Customize** your view for that report. Options available include:

- **Sort or group** by a selected column;
- Move columns in the report left, right, to prompts or sections; and
- **Include or Exclude** (i.e., show or hide) a column in your view.

The screenshot shows the Oracle Business Intelligence interface for a report titled "Budget vs Actual by Project". The report header includes filters for Project Number (GC\_400647), Project Type, Project Organization, Project Status, Expenditure Category, Project Name, Project BU, Project Manager, Task Number, and Expenditure Type. Below the filters is a table with columns: Project Number, Project Name, Project BU, Project Manager, Project Type, Project Organization, Project Status, Task Name, Task Number, Expenditure Category, and Expenditure Type. Three callouts provide instructions: 1. "Hover over a column and then use the arrows to sort by the selected column." pointing to the arrows on the "Expenditure Type" column header. 2. "Click and drag or use the menu to move a column." pointing to the "Expenditure Type" column header. 3. "Right-click a column header to open the columns menu, then click Exclude to remove a column from view." pointing to the right-click context menu for "Expenditure Type" which includes options like "Sort Column", "Show Subtotal", "Show Row level Grand Total", "Exclude column", and "Move Column".

### Saving and Applying Customizations

- Once you have customized your view, you can save it using **Page Options**.
- The next time you open the report:
  - If you have selected a customization as your default, it will open to that view; or
  - You can open this menu and select to **Apply** a saved customization.

The screenshot shows the "Page Options" menu in Oracle Business Intelligence. The menu items are: Edit Dashboard, Print, Export to Excel, Refresh, Create Bookmark Link, Create Prompted Link, Apply Saved Customization, Save Current Customization..., Edit Saved Customizations..., and Clear My Customization. A callout points to the "Save Current Customization..." option.

Click **Save** and give the view a name. You can make this customization your default by clicking the **check box**.

The screenshot shows the "Save Current Customization" dialog box. It has a "Name" field, a "Save for" section with radio buttons for "Me" (selected) and "Others" (with a "Set Permissions" button), and a checkbox for "Make this my default for this page". There are "OK" and "Cancel" buttons at the bottom.