

PMWeb Quick Reference

BI Reporting

1- Click on **Portfolio** from the buttons on the left.



2- Under Reports, select BI Reporting Center.



- 3- Select the type of SQL report from the Report Manager. Example: Cost Management
- 4- Select the Record type. Example: Reports
- 5- Select the **Report type**. Example: Budget Detail Worksheet.



6- Select **Printing Setup** in the header to create a reoccurring report and click on save button. Do nothing if not a reoccurring report.

	GENERAL				PRINTING SETUP	
Report	A/R Payment B	atches Log		SCHEDULE		
Associate With	Record T A/R Payment B	atches	•	Schedule This Report	Never	-
Make This the D	Default Report For the Selec	ted Record Type	\checkmark			
REPORT PARAM	IETERS					
NAME	PMWEB FIELD	DEFAUL	т			
Program	Program ID	•				
ReportTitle	(Use Default)	▼ A/R Paymer	nt Ba			
Project	Project ID	•				
Groupby	(Use Default)	▼ Project				
Currency	(Use Default)	•				
	SAVE					
	↓					
	6					
	·					

7- Re-Select the **General** tab.

8- Select the Preview button.

	GENERAL	PRINTING SETUP
eport Name*	A/R Payment Batches Log	PROJECTS
eport Type	SQL Report	~508 Structural
older Path	SOL Report\Cost Management\Reports\	Investigation
System	₽	~1000298 -121Brazos Hall
erver URL*	http://localhost/ReportServer	Room 313
ath*	/PMWebDev/PMWebReports/Cost Manag	~1000325 - 568 ADA
		 Computer Room Signage ~101 Create Banquette Storage & Storage Unit
		101 Interior Finishes and Refurbishment
		101 Wortham House Pool 🔻
		PREVIEW
		▼ 8
		0
Select the Select the di	View Report on the top right of the second s	ne screen. niddle of the page
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