Quick Start: View Reports

Microsoft

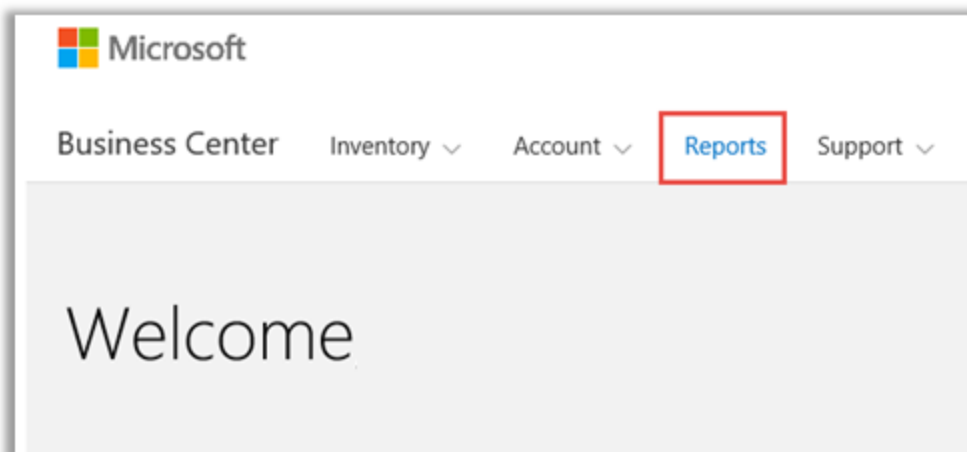***Customer Guide***

November 2016

This guide shows you how to create, save, view and export standard and custom reports in the **Microsoft Business Center**.

To get started, sign in to the Business Center and select **Reports** from the top menu.

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Introduction

Reports allow you to view and analyze your information in the Business Center. You can view reports on demand or schedule some reports to run automatically at certain times.
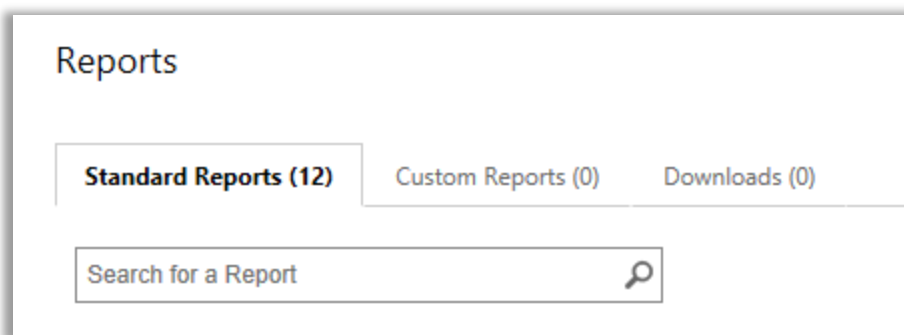
View standard reports

You can choose from a selection of standard (pre-configured) reports in four categories:

- ▶ Agreements
- ▶ Licenses and Services
- ▶ Orders and Invoices
- ▶ Software Assurance Benefits

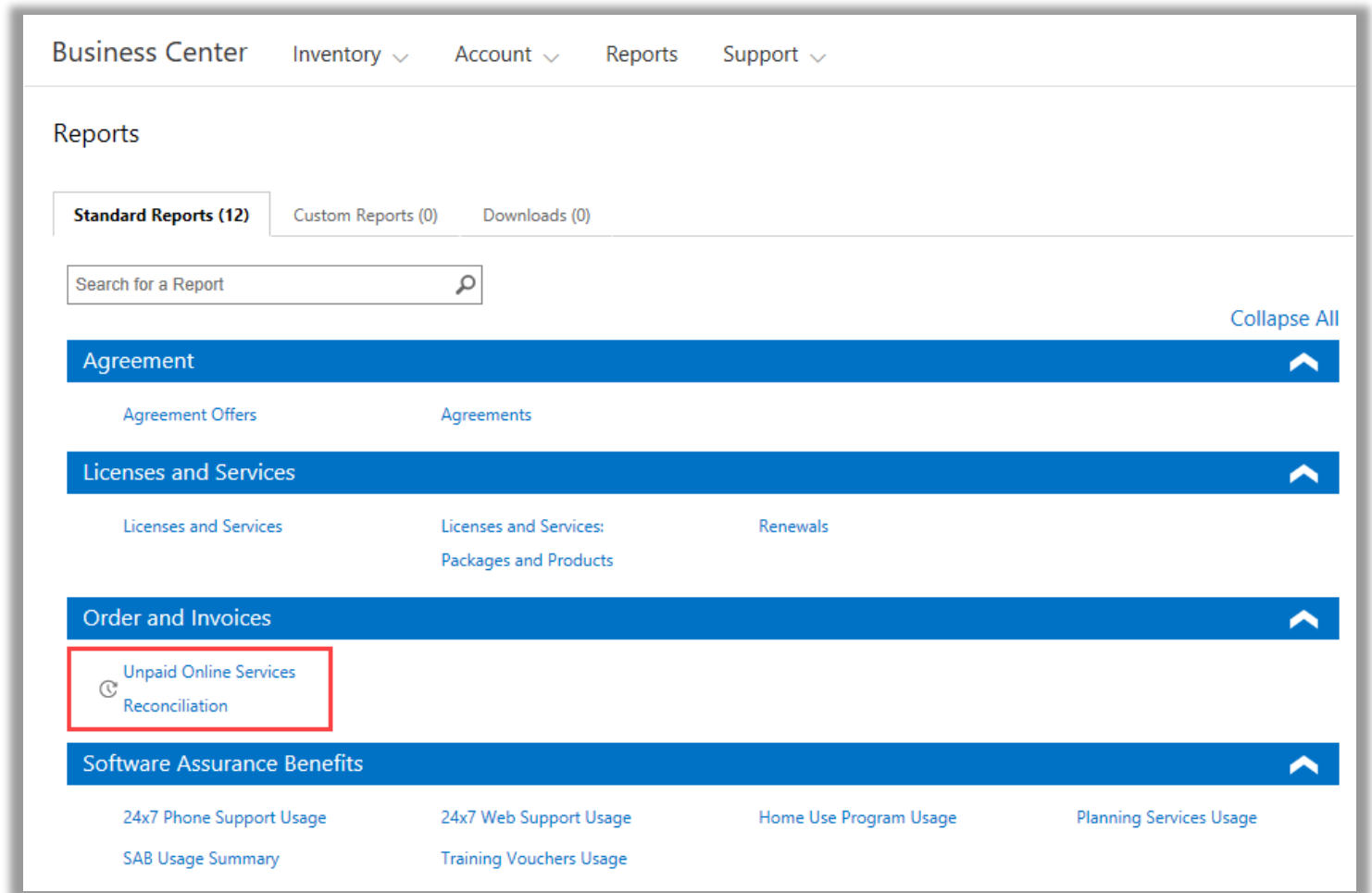**To view a standard report:**

1. In the **Reports** section of the Business Center, select the **Standard Reports** tab.

2. Select the report you want from one of the four report categories.

3. Fill in the fields you want to generate your report. You don't need to fill in all the fields. When you're done, select **VIEW REPORT.**

4. Select **Show more filters** if you want to enter more information to narrow the scope of the volume licensing activity in the report.

- ▶ A clock icon ⟳ indicates you can schedule this report to run automatically at certain times.
- ▶ A check mark next to the clock icon ✓⟳ indicates you have already scheduled this report.

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Choose from many different standard reports in four categories

You can view all these standard reports:

24 x 7 Phone Support report
Enables you to check your use of this benefit, which allows you to open problem resolution requests using the Microsoft Support site or by phoning Microsoft Support.

24 x 7 Web Support report
Enables you to check your use of this benefit, which allows you to open problem resolution requests through the Web using the Microsoft Support site.

Agreements report
Check details on your Volume Licensing agreements, including purchasing agreements and purchasing contacts. You can filter these reports by account, agreement number or contact name.

Agreement Offers report
Enables you to view a report with all attributes related to Purchasing Accounts and the related Offers. This includes information at the Product Pool level including Pool Points and Price Level.

Home Use Program report

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Enables you to check your use of this benefit, which allows your employees to get the latest version of the Microsoft Office suite or applications to use on their home computer through a low-cost download.

Licenses and Services report
Check all your licenses and online services.

Package and Products report
This report lists the customer asset position and history, including how they acquired these assets and how they used them at both package level and product level.

Planning Services report
Enables you to check your use of this benefit, which provides on-site expertise to help you plan your next Microsoft technologies deployment.

Renewals report
Check what services are due to renew and when they will expire. This report can help you determine what services to renew to avoid any disruptions in service. You can filter these reports by order number, agreement number, or product.

Training Vouchers report
Enables you to check your use of this benefit, which lets your IT staff take instructor-led courses taught by Microsoft Learning Partners and developed by Microsoft experts.

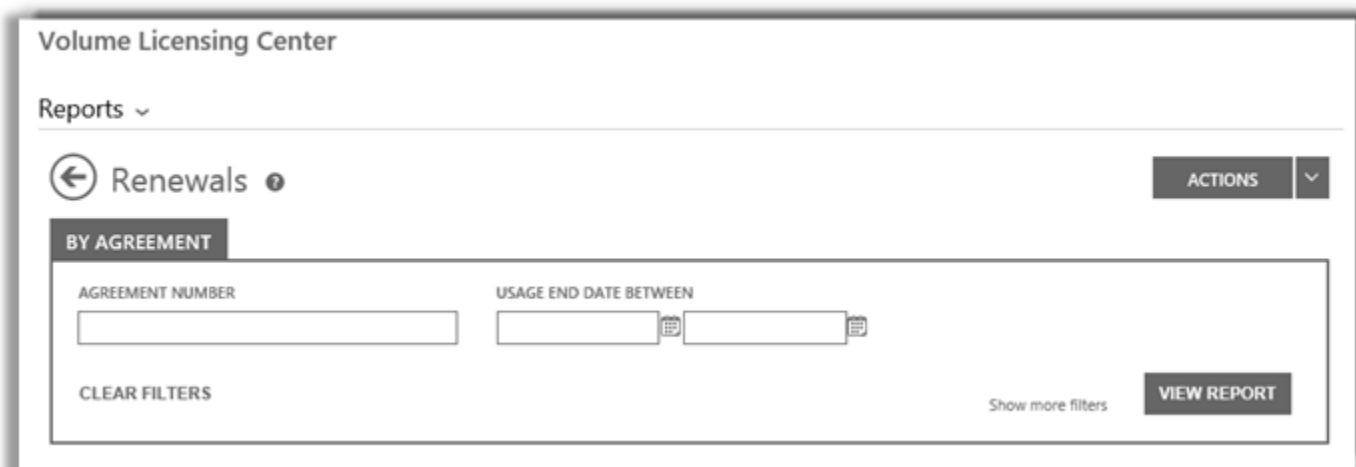**Unpaid Online Services Reconciliation report**
Check for discrepancies between the quantity of online services you are using versus the quantity ordered, and reconcile those differences. This report can help you determine what online services to order to avoid any disruptions in service. You can filter these reports by order number, agreement number, or product.

Create custom reports (Save Report Query)

You can create your own custom reports as variations on the four standard reports. When you fill in the data for all the fields you want, you can save that query and give it your own name, making it easy to run the same custom report again later. Here's how:

1. Open the **Standard Reports** tab and select the report you want to customize.

2. Fill in all the fields you want for your report query. You don't need to fill in every field.

   You can also add or remove columns from your custom report. For instructions, see <u>Customize the columns in your report</u>.
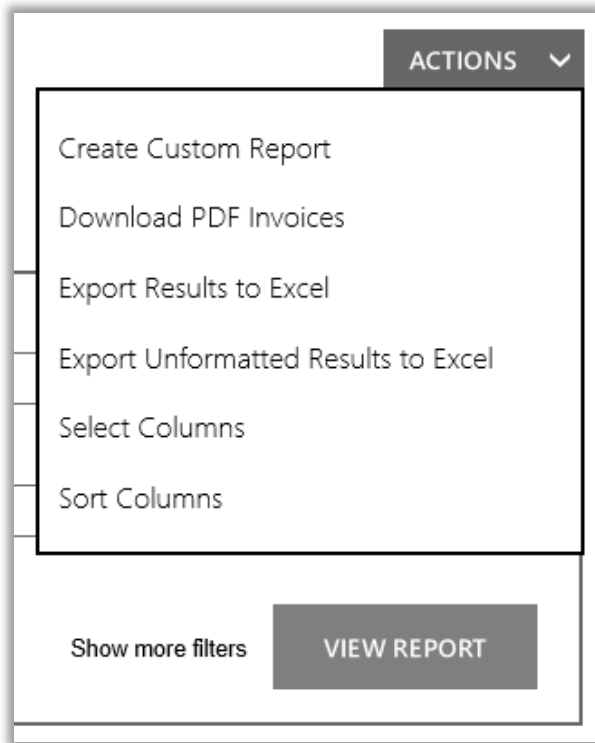

The fields for the Renewals report, one of several different standard reports you can create and then customize

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3. Select **ACTIONS**, then select which of the six actions you want, and then select **VIEW REPORT**.

4. Type a title for the report in the **NAME THIS REPORT** field. You can name the report whatever you want.

   Optional: Type a description of the report in the **DESCRIBE THIS REPORT** field.

5. Select **SAVE** to save your report for future use. It will be added to the **Custom Reports** tab, where you can view it immediately.

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You should receive a confirmation message that your custom report has been added to the report catalog.

NOTE *You can subscribe to some custom reports. If you can subscribe to this report, the custom report form will include a section named* **Subscribe to this custom report.**

To subscribe (optional):

6. If you can subscribe to your new custom report and want to do so, go to the section titled **Subscribe to this custom report** and select **Yes** under **DO YOU WANT TO SUBSCRIBE?**

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7. Select the frequency of how often you want to receive this report, either weekly or monthly. This will automatically generate the report every week or month and place it in the **Downloads** tab of the **Reports** section.

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8. Some reports select the data period for you and don't give you an option to choose this. Other reports let you choose the data period. If you can choose the data period for this report, do so now.
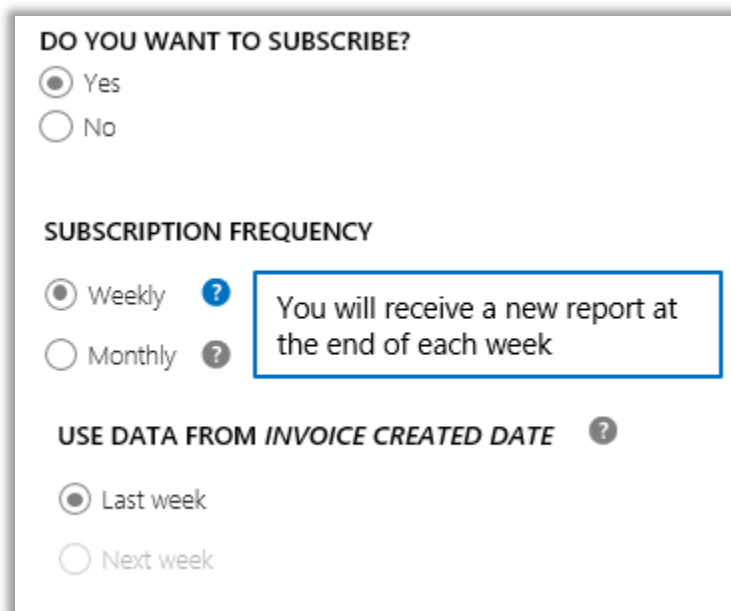
    For monthly reports, the options are:

    - Last month

    - Current month plus X months (where you select the number of months)

    - Next month

    For weekly reports, the options are:

    - Last week

    - Next week

9. When you are done filling in all the subscribe fields, select **SAVE**.

    To verify that you are subscribed to your new custom report, select the **Custom Reports** tab and view the **SUBSCRIBED** column. **Yes** indicates you are subscribed to the report.

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DATE GENERATED	SUBSCRIBED	REPORT TYPE	CUSTOM REPORT NAME	CUSTOM REPORT DESCRIPTION
7/1/2016 1:15:55 PM	Yes	Invoice	Monthly Invoice	For the accountant
6/1/2016 12:00:00 AM	No	Price List	Monthly Pricelist	High school bakery prices
6/1/2016 4:15:55 PM	Yes	Licenses and Services	Monthly supplies for June	Quantity of Licenses for June
12/1/2016 4:15:55 PM	Yes	Price List	Price List custom	High school bakery prices
11/1/2016 4:15:55 PM	No	Price List	Price List	High school bakery prices
11/1/2016 4:15:55 PM	No	Price List	Price Litmus	High school bakery prices
2/1/2016 4:15:55 PM	Yes	Invoice	Weekly Invoice	For the accountant

Customize the columns in your report

Here's how to customize the columns that appear in your report:

1. Choose **Select Columns** from the **ACTIONS** drop-down list.
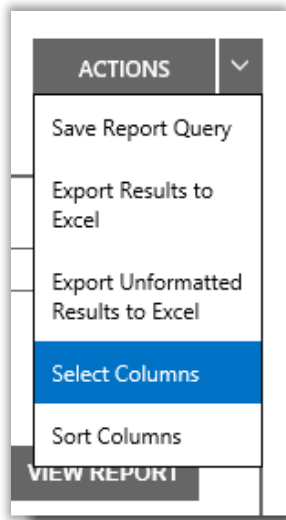
2. Select the column you wish to add from the **Available Columns** list (on the left). It will highlight in blue to signify that it has been selected.

3. Select the **right arrow** icon to add the column selected to the report.

4. The new column appears in the **Selected Columns** list (on the right). Again, it is highlighted in blue.

5. Select **SAVE**.

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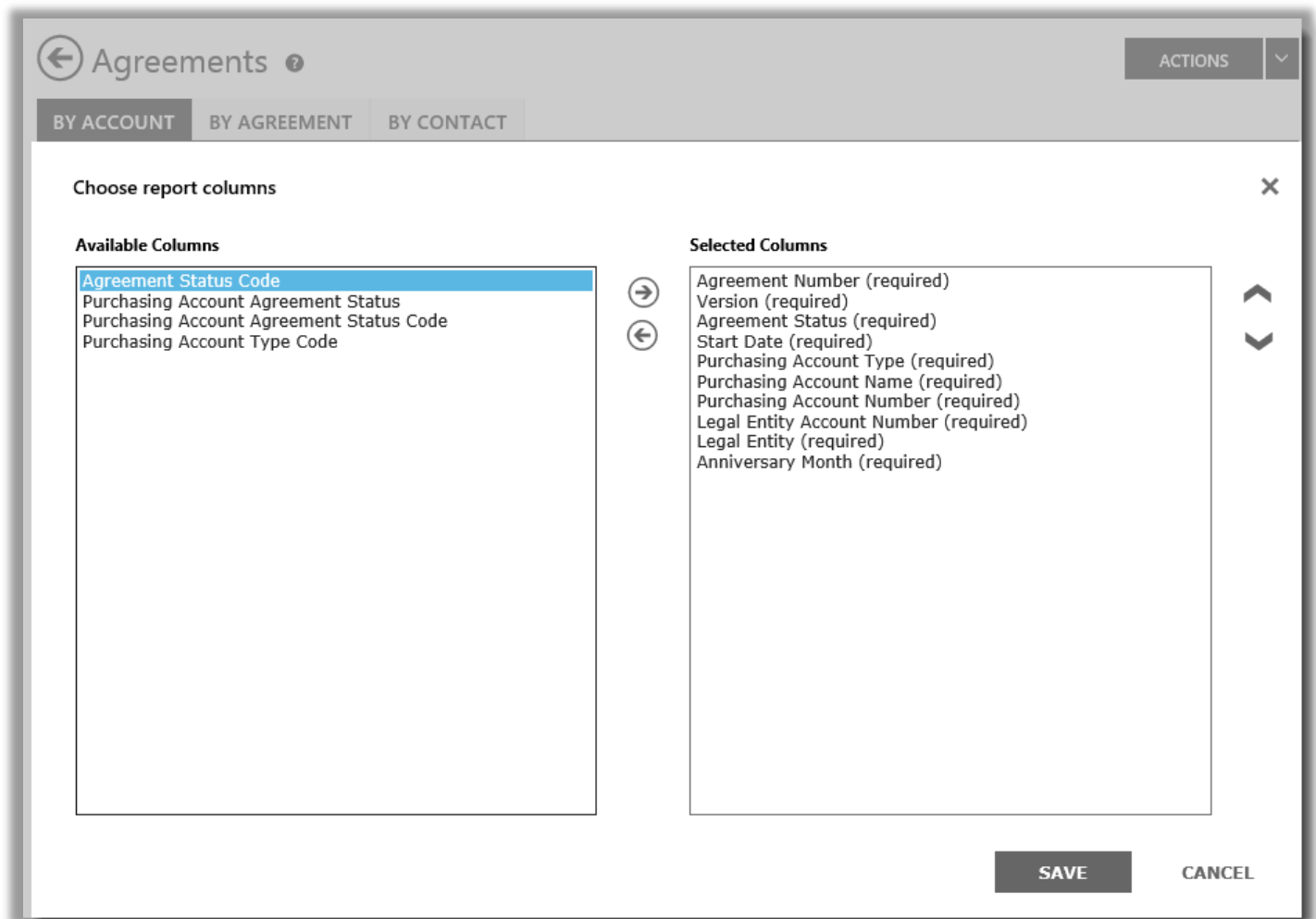
You can select what columns you want to add or remove from your custom reports

You can also remove a column:

1. Select the column (or columns) you want to remove in the **Selected Columns** list (on the right). It will highlight in blue.

2. Select the left arrow icon to return it to the **Available Columns** list (on the left).

    Once you have removed the column from the **Selected Columns** list and placed it back in the **Available Columns** list, select **SAVE** to keep your changes.

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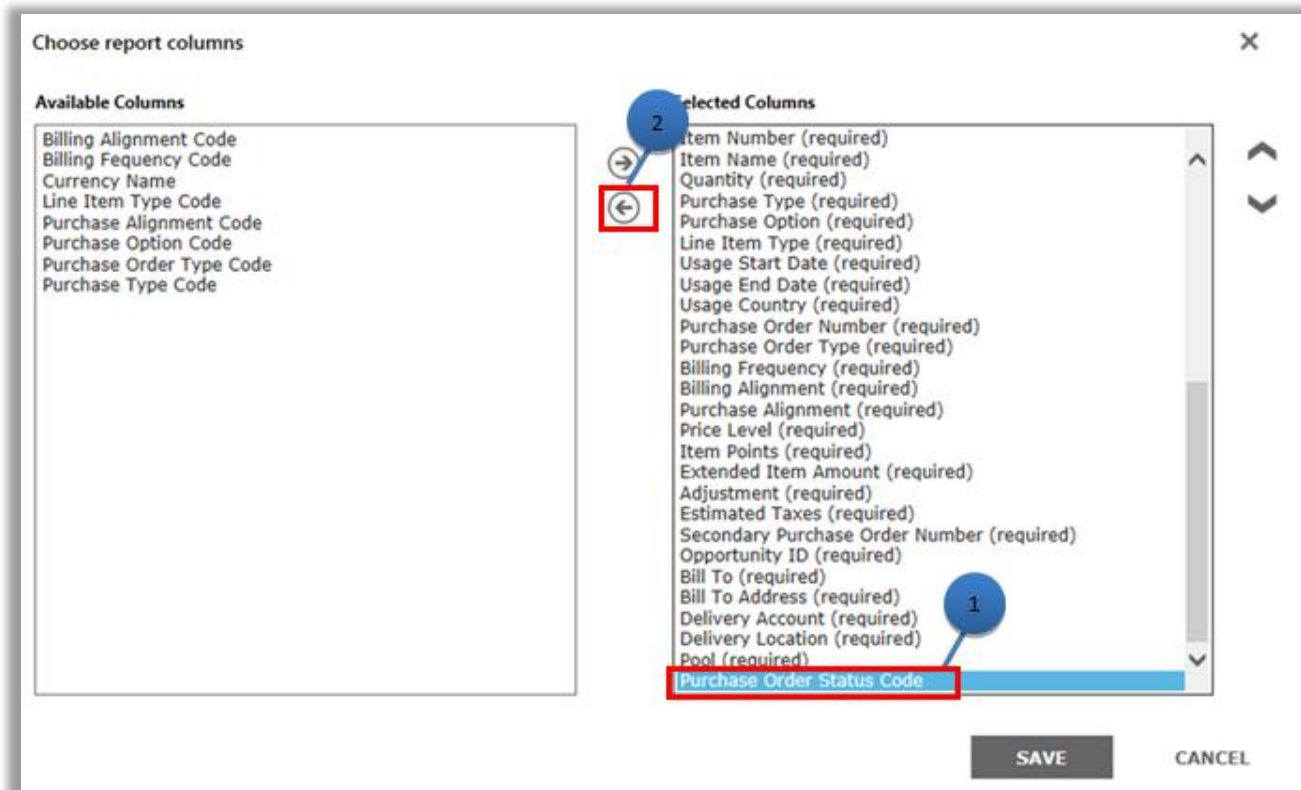
You can also remove column from your custom reports

View your custom reports

After you save a query and create a custom report, you have three actions available:

View Report, **Export report to Excel**, **Export Unformatted Results to Excel,** or **Remove Report**.

Here's how to view your custom report:

1. Select View your custom reports.

2. Pick which report you want and select **View Report** from the **ACTIONS** drop-down list. The report displays.

   NOTE *The display is limited to 10,000 records. If your report exceeds that limit, a warning message will let you know that there are records not shown. If you receive this error message, use the filters to narrow your search criteria.*

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You can select which page of your report to view by using the controls at the bottom of the screen.
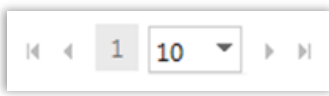
Export reports

You can export up to 1 million records of a report into an Excel spreadsheet from either the **Reports** page or from a report that is on-screen. You can specify the name and location of the Excel file, but the file format cannot be changed.

If your report contains more records than you want, use the filters to narrow your search criteria.

NOTE *Excel PivotTables are a powerful tool to help you visualize your data in Microsoft Excel. You can create PivotTables from your unformatted reports. To use this tool, all numeric value columns are automatically converted from text to a number format in Excel. Any numeric fields in your report that should be blank will display as 0.*

To export a report

1. Select the **Custom Reports** tab.

2. Pick which custom report you want.

3. Select **Export report to Excel** or **Export Unformatted Report to Excel** from the **ACTIONS** drop-down list.

4. Select **Open**, **Save** or **Cancel** after the report downloads.

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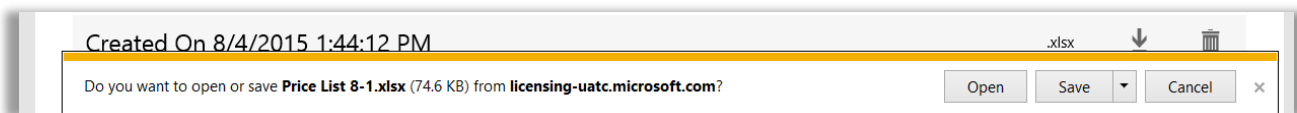
Choose the language for Excel reports

To change the language of the data in your reports, you must first change your Windows and browser settings to the same region or locale before exporting your report. The text, currency and other data in your report should display in the language for that region.

Remove reports

To remove the query from your custom reports, do the following:

1. Click the **View your custom reports** tab on the **Reports** page.

2. Select the report you want to remove.

3. Select **Remove Report** from the **ACTIONS** drop-down list.

4. Click **YES** to confirm that you want to remove the custom report from your report catalog.

   Once the query is deleted, you will no longer be able to view the report.