# Capital Projects Dashboard FAQ

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Accessing the Financials – Capital Projects Dashboard

1. Navigate to bi.mcmaster.ca. Do not include the 'www.'
2. You can also access BI from Mosaic: From Mosaic homepage, go to Administrative Home (top center menu), Financial Reporting Hub tile, then you will find Capital Projects under BI Dashboards section:

   BI Dashboards   ∧
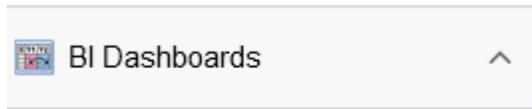
   Capital Projects
3.
4. Enter your MacID and Password:
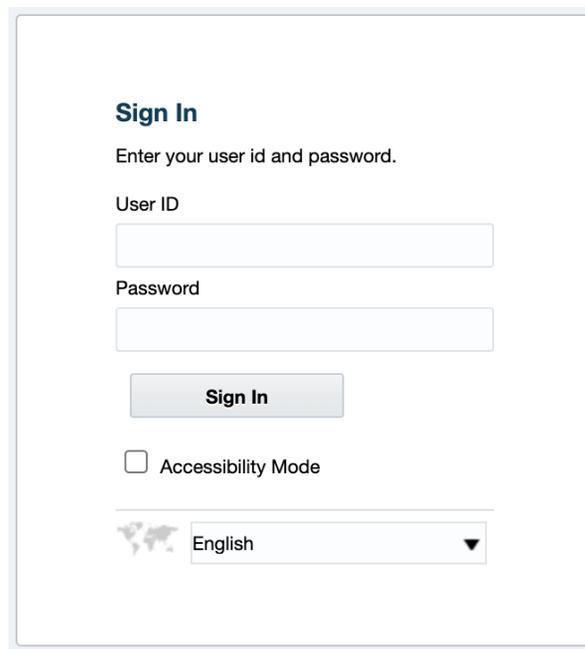
   Sign In

   Enter your user id and password.

   User ID

   [   ]

   Password

   [   ]

   Sign In

   ☐ Accessibility Mode

   English   ▼

5. If you are unable to sign in, check that you are connected to the McMaster network, either by using WiFi on campus or by using a VPN to connect to the network. If your issue persists, please contact irahelp@mcmaster.ca.
6. Once logged in, use the 'Dashboard' menu in the top right corner to select the Financials – Capital Projects dashboard.
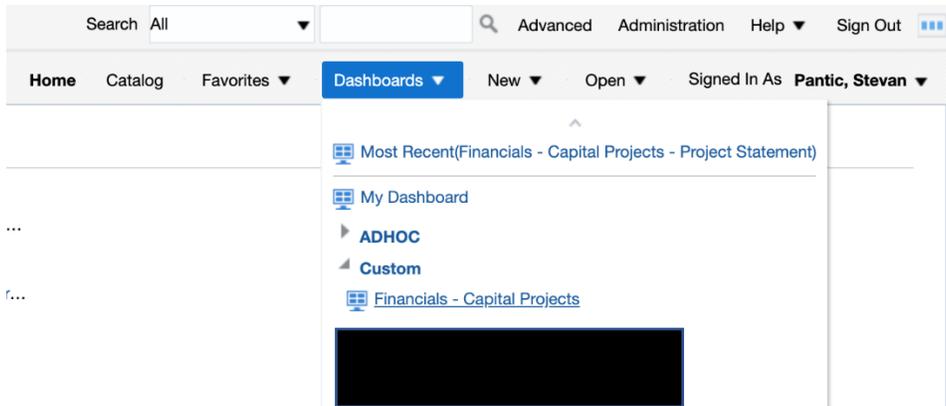
Can I save the selection I have made so that I do not need to select them again the next time I view a report? (Saved Customizations)

1. Yes, it is possible to save all the selections you have made in the filters as well as any changes you have made to the formatting of the reports. This feature is called 'Saved Customizations'.
2. To save your selections and formatting, click the 'Page Options' click-wheel in the top right-hand corner of the page:

3. Click on 'Save Current Customization...'. A 'customization' is the Oracle terminology for saving all the filters you have applied as well as any formatting changes you have made to the reports. A

new dialog box will open prompting you to name your customization. Try to give it a descriptive name so that you remember what you saved.
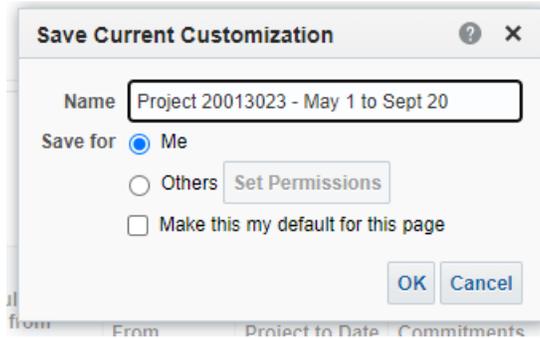
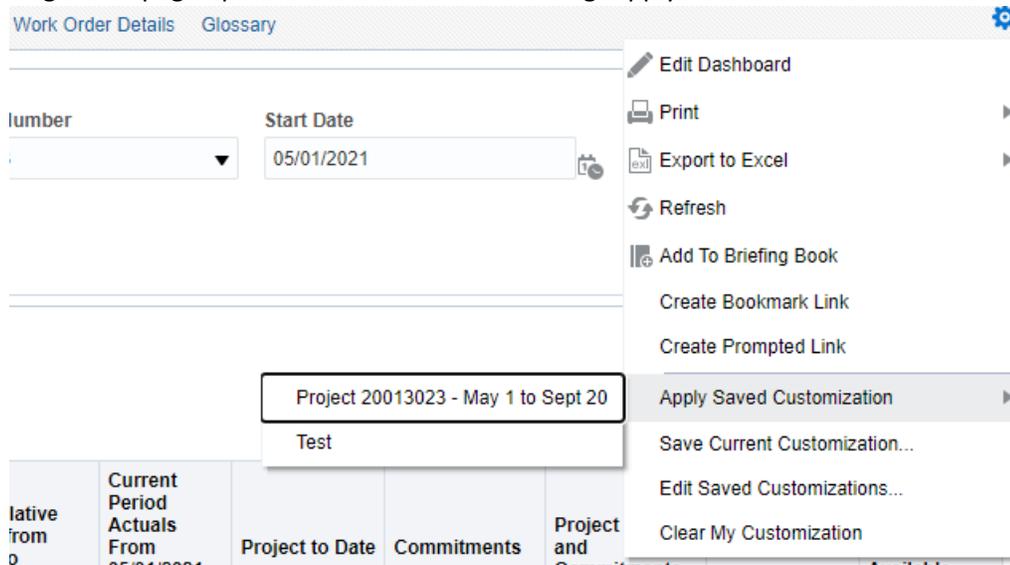4. If you wish, you can click 'Make this my default for this page' and the report will run as you have it set-up every time you load the page.

5. If you do not wish to make these settings your default, you can run this customization by returning to the page options click-wheel and selecting 'Apply Saved Customization':

6. You may save as many different customizations for a single page as you wish.

Why do I need to select my filters for each page? Can I just select the correct project manager, project number, WO, etc. One time and have it applied everywhere?

1. Unfortunately, you need to use the filters to make selections on each dashboard page. For example, if on the 'Project Statement' page you select a specific project and time period and then wish to switch to the 'Project Summary' page, you will need to select the project manager and time period again.

2. We strongly recommend that all users take advantage of the 'Saved Customizations' feature to set defaults and to save any commonly generated reports.


I can only see the Top 30 rows of a table; how can I expand the table to see more rows?

1. If you have generated a report with more than 30 rows, only the first 30 will be displayed by default.
2. To view the other rows, use the arrows at the bottom of the report. You can click the down arrow to view the next 30 rows or the two-sided arrow on the right to show all rows:


Rows 1 - 30
Edit - Refresh - Print - Export

Can I download reports to Excel?

1. All reports in BI can be exported to Excel and other formats.
2. To export a report, scroll to the bottom of the table and click 'Export':

Rows 1 - 30
Edit - Refresh - Print - Export

3. A menu will pop up displaying the format options available:

4. If you select Excel as your export format, the report will be downloaded with the same formatting as the displayed report. For example, any cells that appear merged on the dashboard will also be merged in the exported report.

PDF
Excel
Powerpoint
Web Archive
Data ▶
Export
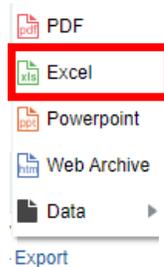
5. In order to download the data with no formatting, go to Data → Excel. This format will export the data that appears in the report without any additional formatting. You can also select CSV to download the raw data, however, leading zeroes will be dropped in this format (see next question to resolve this).

PDF
Excel   Excel
Powerpoint   CSV
Web Archive   Tab Delimited
Data ▶   XML
- Export
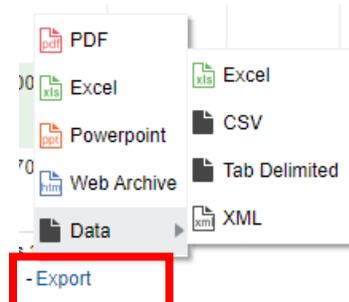
## How can I add leading zeros when exporting to CSV?

1. Sometimes when exporting a report, you may notice that the 'leading zeros' are dropped when you open the report in Excel.
2. To retain the leading zeros, first download the desired report data as a CSV or tab delimited flat file.
3. Next, open a blank Excel sheet before opening the downloaded data. Select the full excel sheet and change the data type on all cells to Text.
4. Next, click the 'Data' tab in Excel and choose to import data 'From Text/CSV'. When you select the downloaded data to import, the data will be retained.

I cannot find the value I want in the filter drop-down menu. Can I search for it?

1. When using the filters at the top of each page, you may notice that not all values are listed.
2. To see additional values and to search for your desired value, click 'Search…' at the bottom of the drop-down box.
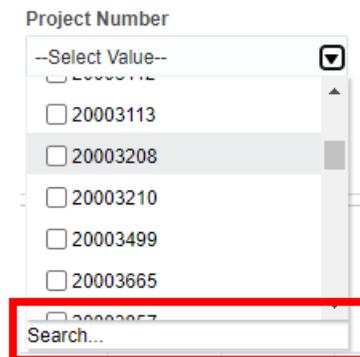
3. A new dialog box will appear from which you can search for specific values:
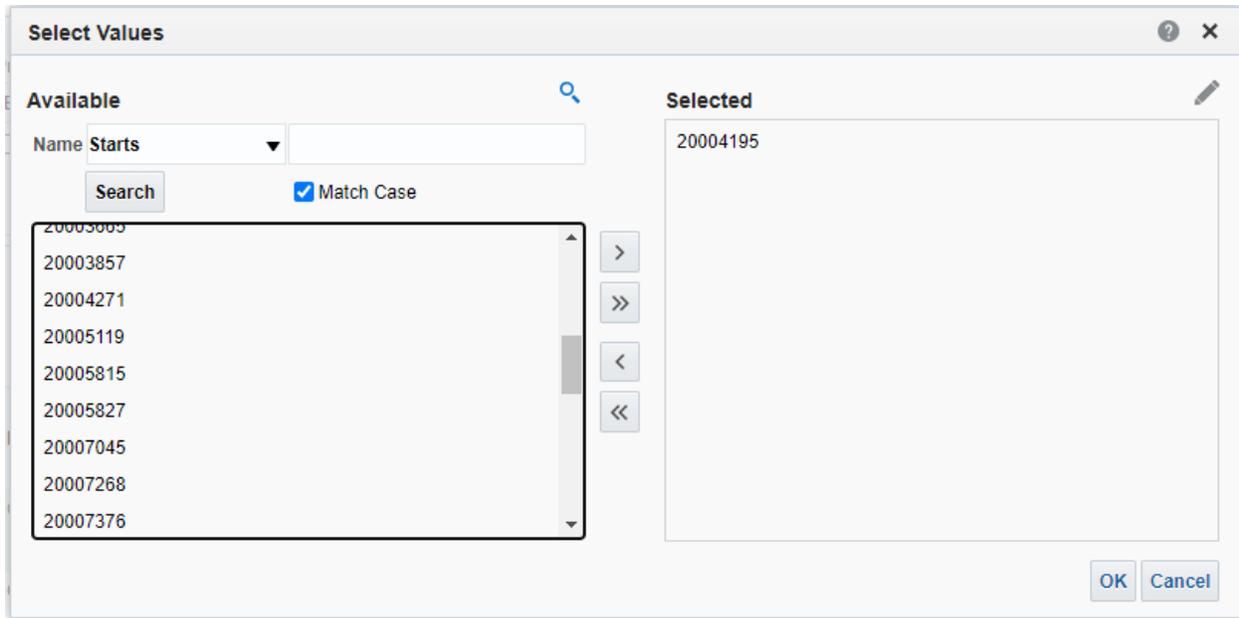
4. Use the arrow buttons to add or remove values from the 'Selected' list on the right-hand side. Click 'OK' when you are finished making selections.

Can I select by Employee ID instead of Project Manager name?

1. Yes, you can select by Department ID. Below the 'Dept' filter, there is a checkbox that says 'Select by EmplID':
2. If you click this box, the list of displayed project managers will show Employee IDs (followed by the Project Manager Name). You may select from the displayed list, type the desired Employee ID, or use the search functionality to lookup the desired Employee ID(s).

Can I view individual Work Orders that are associated with the Transactions page?

1. The ability to drill-down from transactions reports to individual work orders is one of the key enhancements of the Financials – Capital Projects dashboard.
2. To access the drill-down reports, simply click on values that are highlighted in blue. A link will appear that says 'Work Order Details':
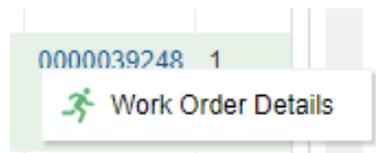
Can I view all projects assigned to a Project Manager?

1. Yes, if you select a Project Manager using the Project Manager search filter and click Apply, all of the Projects/Transactions/Work Orders related to that Project Manager will appear.
2. Please note that if you are selecting by only Project Manager (or Project Status) on the Work Order Details page, the second report "Work Order Details – Work Orders with $0 Total Cost" will not be filtered by Project Manager or Project Status, but any other filters you have selected (ex. Work Order Status) will apply.