Prompt Screen Tips and Tricks

When running a report in Analysis, you need to provide the data to be retrieved for your report. These data items are sometimes called variables.

The Prompt (variable) screen is used to narrow down the data that the report retrieves.

This job aid will show you some tips and tricks for completing the Prompt screen data fields in various reports.

Identify mandatory variables on the Prompt screen

Mandatory (required) variables are designated by a red asterisk (*).

Fill in the mandatory variables on the Prompt screen

There are two ways to fill in the values for the variables.

1. You may type a value in the mandatory variable text field.
2. Or, click the Display Member Selector button to choose from a drop-down list of values.

NOTE: Some Prompt screens have a greater number of mandatory variables.
Mandatory variables – Changing the drop-down from Between to Equal

You must use the drop-down to switch from Between to Equal for those mandatory variables where you want individual values in those fields.

Best practice: Hit Enter on your keyboard after entering or correcting a mandatory variable. Your report will not launch until you click the OK button.

Adding optional variables

You may also want to include optional variables to further narrow your data.

Click the arrow to expand the optional variable data field area. Type your values in the text fields or use the drop-down menus.
Entering dates - YYYYMMDD

Fiscal periods and years should be entered as MM/FY.

Dates should be entered as YYYYMMDD on the Prompt screen.

Adding or deleting rows of data

Click the Add button to add rows and the Delete button to delete individual rows of data from your Prompt screen.

For example, if you are responsible for more than one organizational unit, you can add each one to the Complete Labor Distribution report.

Using ranges of data (i.e., Between and Greater Than)

To filter ranges of data on the Prompt screen, you may define your range by typing values as shown below.
NOTE: The wildcard character, asterisk *, cannot be used to complete variables on the Prompt screen. You may use the wildcard in the Member Selector search box.

**Filtering (using the Display Member Selector button)**

On the Prompt screen, you can type data directly into a text field, or you can click the Display Member Selector button that's next to that text field.

Just follow these steps:

1. Click the Display Member Selector button.
2. In the resulting pop-up, highlight one value.
3. Click OK to transfer that value to the Prompt screen.

Repeat for any remaining values.
Using the Display Member Selector button to search for personnel numbers and names

Sometimes it is necessary to look up the personnel number of a PI to include on your Prompt screen. You may use the Display Member Selector button to search for data, such as personnel numbers, PI names, or vendor names.

Follow these steps to find a personnel number:

1. From the Prompt screen, click the **Display Member Selector** button.
2. In the Member Selector pop-up, type the name. Remember this is case-sensitive. Replace spaces with an asterisk (*). You may also use the asterisk to complete a portion of a name.
3. Click the **Find Members Binoculars** drop-down to indicate whether you want to search through personnel numbers (Key) or names (Text). For this example, you would select Text.
4. Click the **Find Members Binoculars** button to launch your search.
5. Click to highlight the appropriate value.
6. Click the **OK** button to apply that value to your Prompt screen.

**NOTE:** You can only select one value at a time to transfer to your Prompt screen.
The Save Prompts button and the OK button

Checks in the Prompt Summary area show that these fields contain data. The OK button will not activate until mandatory fields contain data.
1. After the OK button is activated, check the Save prompt values with workspace checkbox to include the variables you have selected.
2. Click the OK button to launch the report.

Troubleshooting - OK button does not activate

You must hit Enter on your keyboard after filling in or correcting all mandatory variables to enable the OK button.

NOTE: Double-check date formats to make sure they are correct: YYYYMMDD. This is a common error.
Troubleshooting – Error messages

Errors on the Prompt screen will be designated by a red X next to the variables. Hover over the X to view a tool tip of the error message.

If incorrect values are entered into the Prompt screen and you are able to click the **OK** button, an error message will pop up.