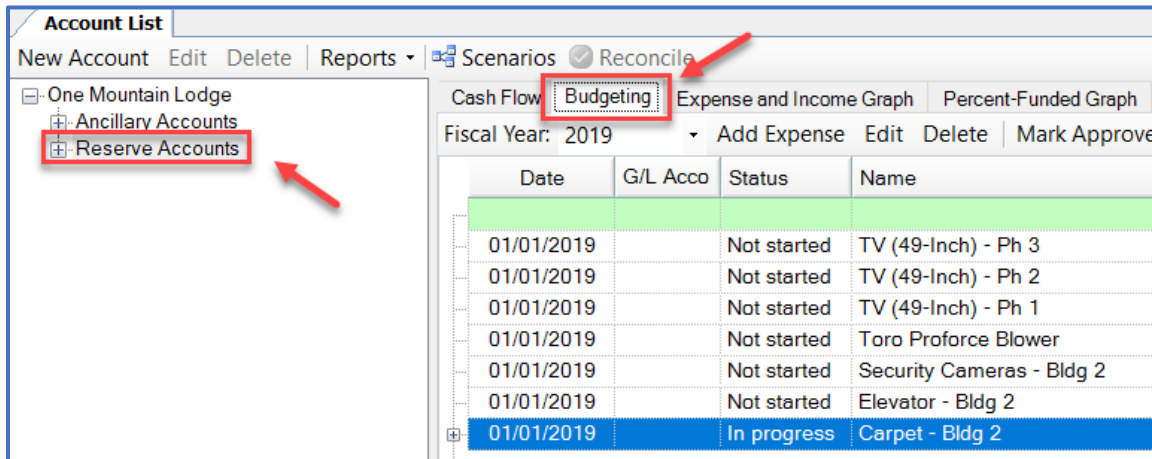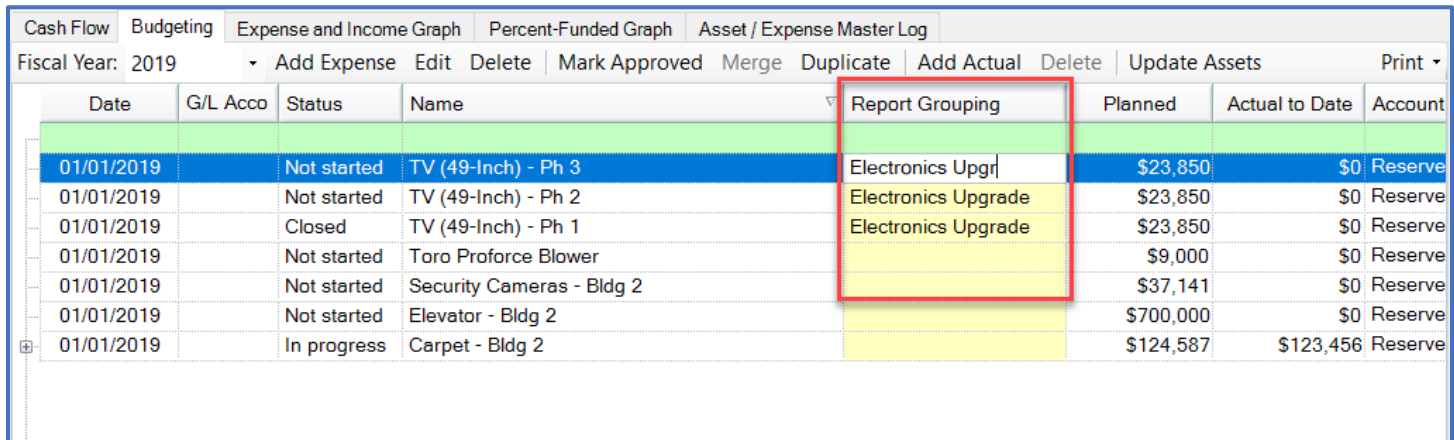ASGARD LEARNING PORTAL

Using Report Grouping

Note: Follow the steps below to add a new Report Grouping through the Budgeting Tab, the Account Detail Page, the Asset Types List, Asset Type Details page, and through Scenarios. For any additional questions regarding Report Grouping, please contact finance@katanasoft.com.

Step 1: Open the Account List Tab and select the Account where the Expense is located. Select the Budgeting Tab.

Step 2: Click in the yellow Report Grouping cell and type in the name of the Project. When you are finished typing, press the Tab key and the page will refresh. Repeat this process for all included Expenses.

Note: *Entering a project name into the Report Grouping column on the Budgeting Tab only applies to the individual expense in the fiscal year chosen, not to all future expenses of the asset.*

To include all future expenses in a project, add the Report Grouping to the Asset Type List page.

Note: The Report Grouping can be found on the Asset Type Detail Page in the Report field.

Report Grouping for both individual and recurring expenses can also be edited from the Account Detail page. Open the Account Details Page by double-clicking.

Note: *After all project expenses have been labeled, you can generate Reports showing the expected expenses. Reports that can be generated with Report Grouping are:*

- *Annual Expenditure*
- *Expenditure Summary*
- *Periodic Budget Variance*

Note: *Report Grouping can also be added to Scenario expenses. Existing Report Groupings will be maintained from the live data when creating a new Scenario.*