



Navigating to the Transactional Reporting Table of Contents and Set Favorites in Reports and Analytics

This guide will cover:

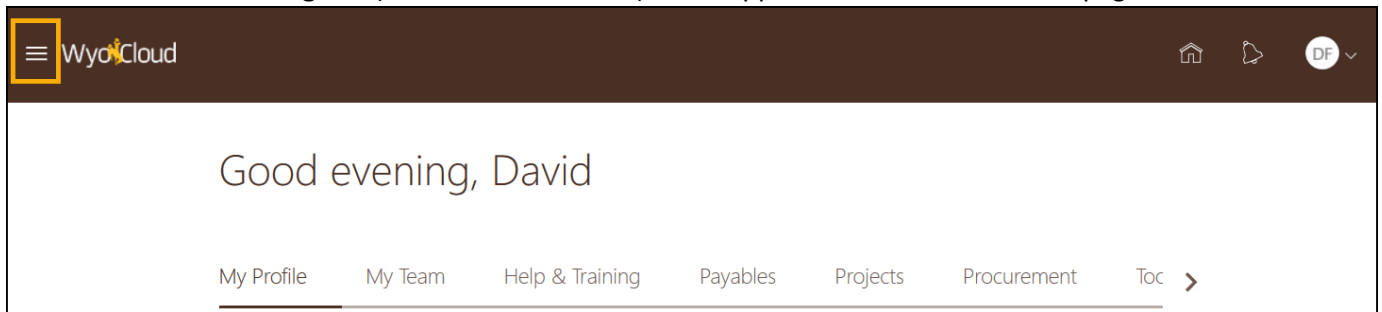
- How to navigate to the Reports and Analytics area of WyoCloud and the Transactional Reporting Table of Contents.
- How to locate and set frequently used reports as favorites.

The Table of Contents contains many of the most frequently used transactional reports in WyoCloud Financial Management.

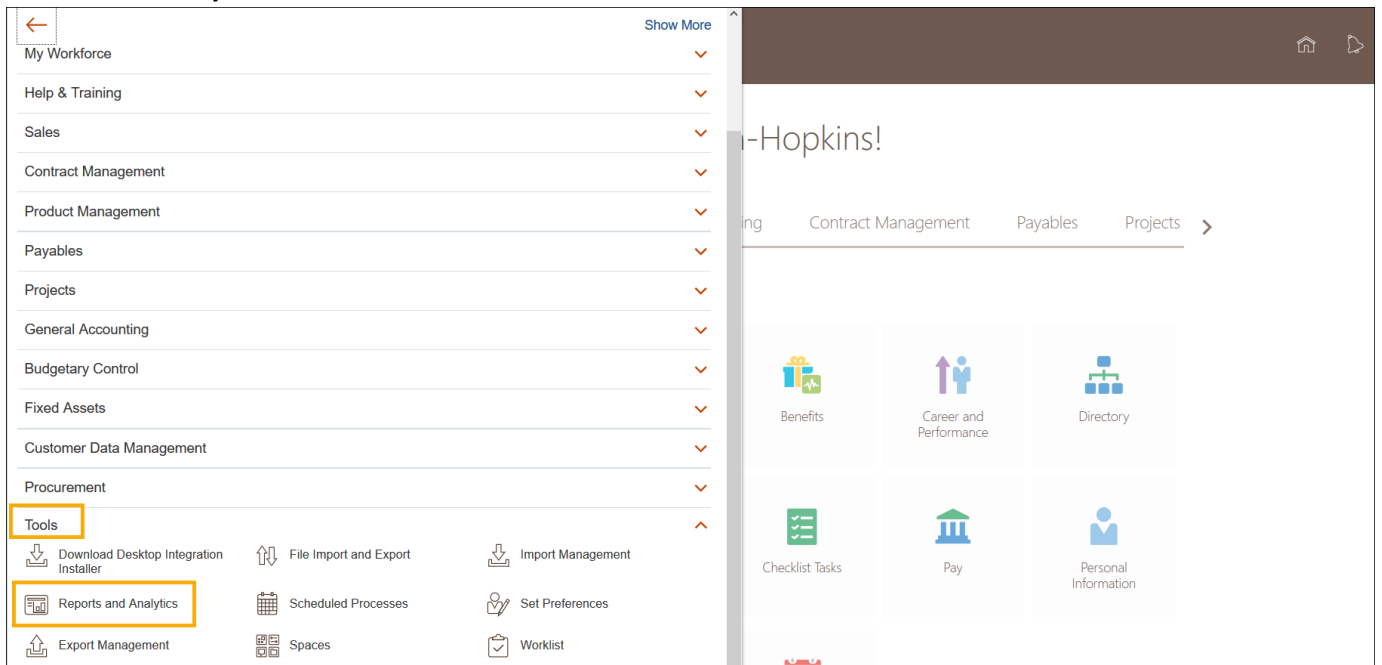
Step One

Upon accessing WyoCloud from WyoWeb, navigate to Reports and Analytics.

- Click on the **Navigator** (three horizontal lines) in the upper left corner of the homepage.

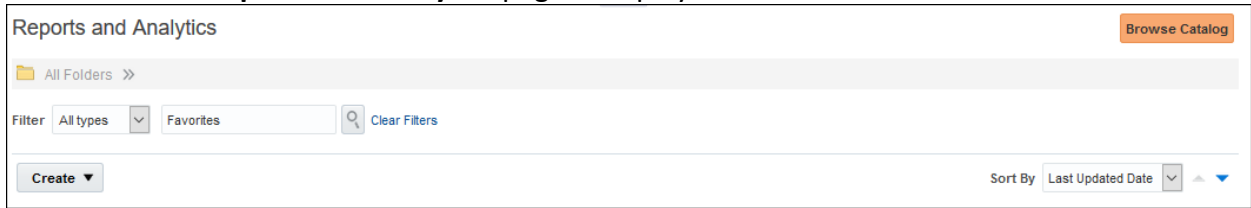


- First click on **Tools** to expand (you may need to scroll within the navigator), then click **Reports and Analytics**.





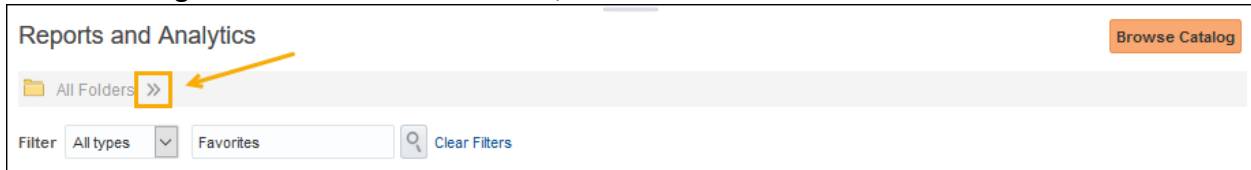
- The **Reports and Analytics** page is displayed.



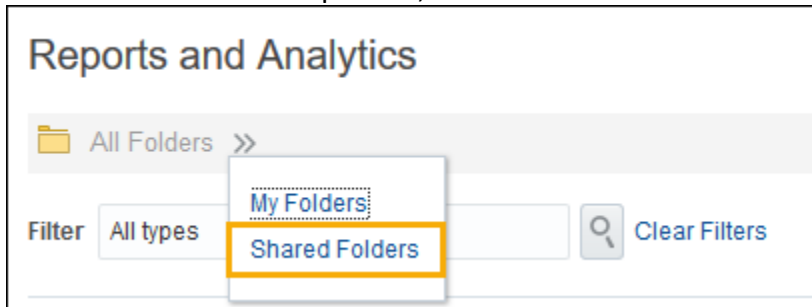
Step Two

Navigate to the Transactional Reporting Table of Contents:

- The first step to locating any report not previously marked a favorite is to navigate through the available folders. First, select the small **double arrow** above the search.



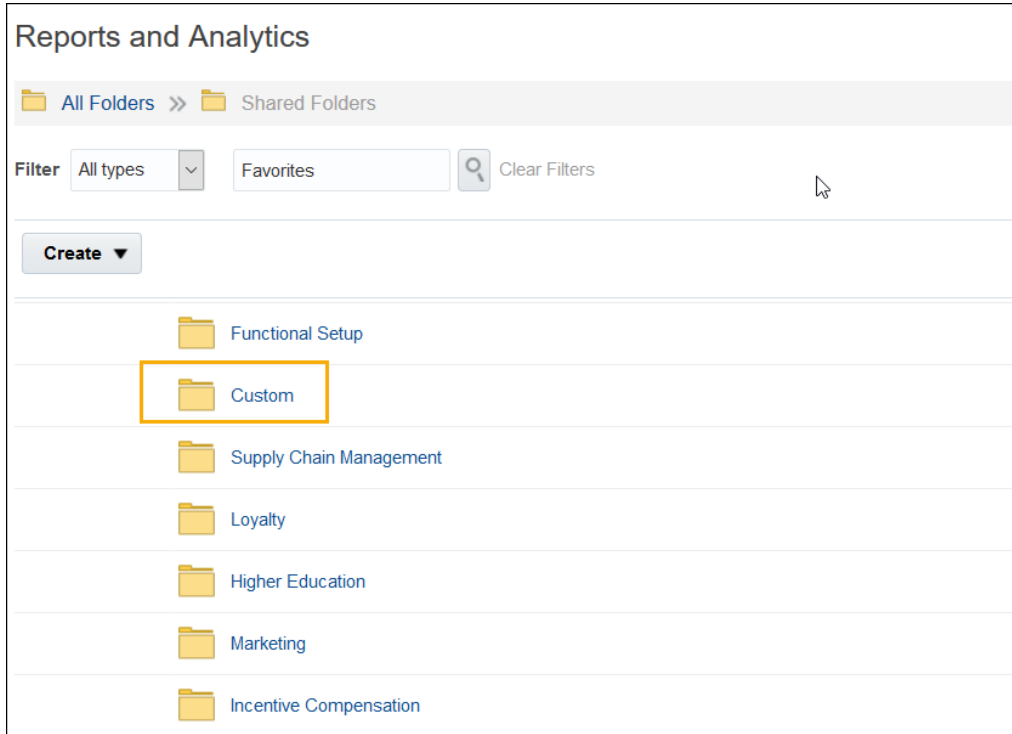
- From the drop down, select **Shared Folders**.



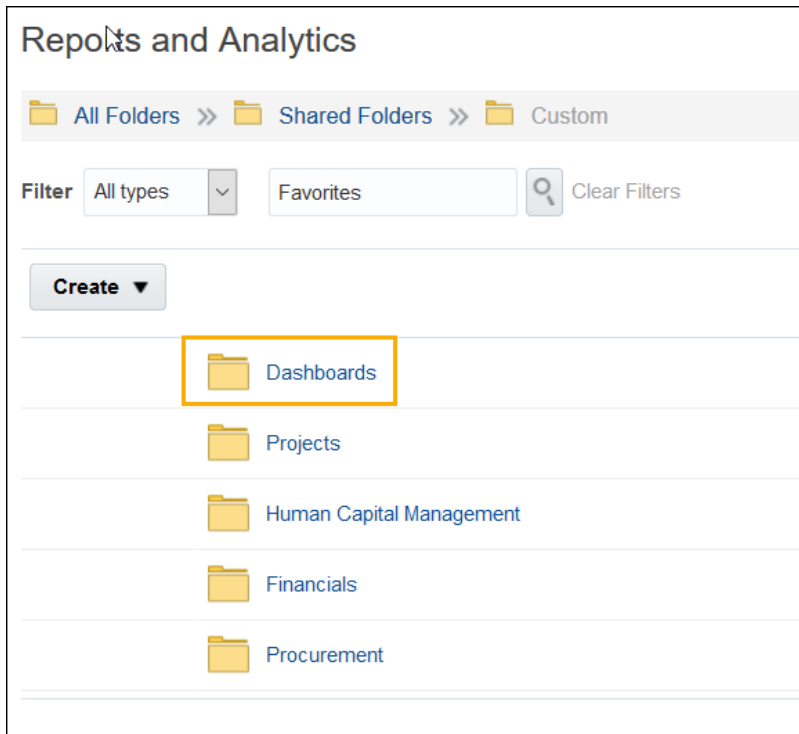
Note: The remaining items within Step Three navigate you to the Table of Contents. If you would like to add another report as a favorite, follow the navigation steps found in the [Quick Reference Guide](#) associated with that report. See Step Four for the remainder of the steps to set the report as a favorite.



- All Shared Folders you currently have security access for will display. To locate the Transactional Table of Contents, begin by clicking on the **Custom** folder (you may need to scroll to locate it).

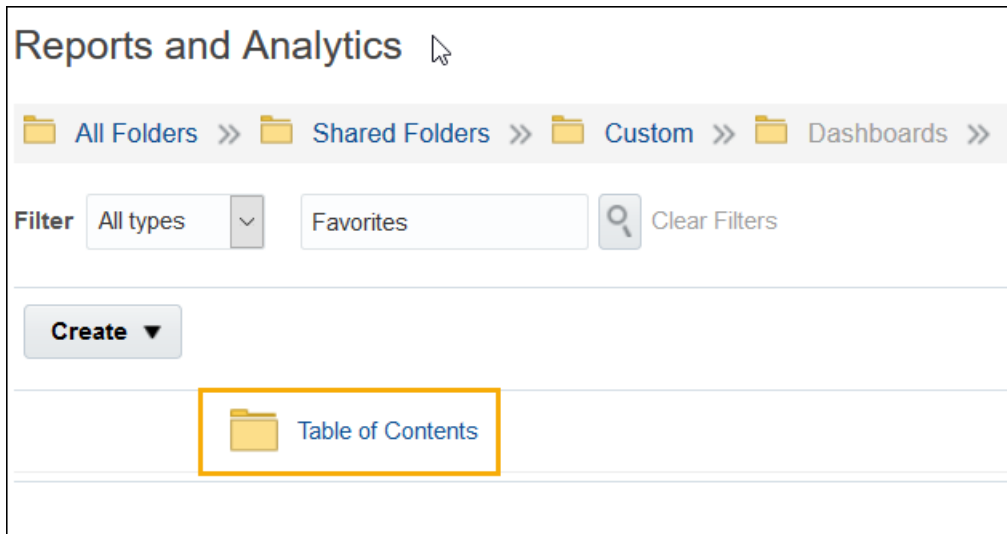


- Click **Dashboards**.





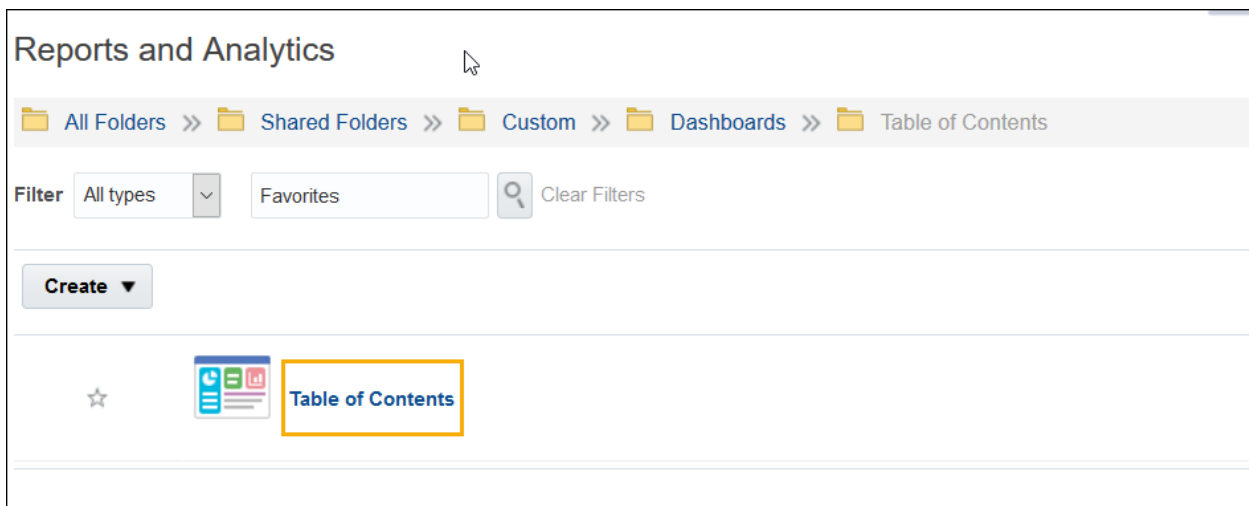
- Click **Table of Contents**.



- To open the Table of Contents, click on the **title**.



Note: If you would like to set it as a favorite for easier access in the future, continue onto Step Four *prior* to clicking on the title.

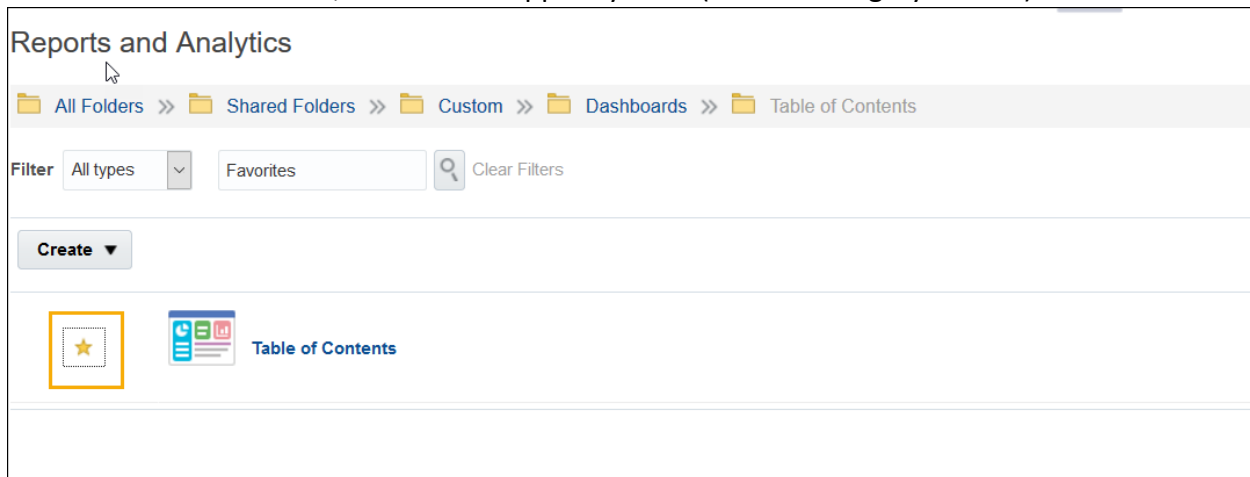




Step Three

Setting a report or dashboard as a favorite for easier access in the future. In this example, we will be setting the Table of Contents as a favorite. However, the same steps can be followed for any report available within Reports and Analytics.

- Prior to opening any report, analysis or dashboard, click on the **star** to the left of the title. Once clicked, the star will appear yellow (instead of a grey outline).



- The report has now been set as a favorite. You may navigate away from it or open it for use.
- The next time you visit Reports and Analytics (by clicking on the navigator then Reports and Analytics), your main dashboard will show all favorited reports/dashboards on the main page. You can open and/or run directly from this page.



- Should you want to remove a report/dashboard from your favorite list, click the star to the left of the report again to turn it back to a grey outline. The next time you visit Reports and Analytics, it will no longer appear on your main page.

You have now navigated to the Transactional Reporting Table of Contents and set favorites within Reports and Analytics.