

Introduction

You may find that you frequently specify the same variable values when executing a report. It is possible to save those values so they can be recalled, thereby avoiding the need to re-specify them each time you want to run the report. The object containing those saved values is referred to as a *Variant*.

This Help Guide explains how to create, edit and use a Variant.

Report Variants

In SAC, Variants can be saved in either of two forms: local or global. Here are the characteristics of each:

Local variants

- Are specific to an individual user and are not visible to other users.
- Allow users to personalize their view of a story or application without affecting others.

Global variants

- Can be used by anyone with access to the report for which the variant was originally created. In other words, a global variant is one that can be shared among users.

Create a local variant

1. Run the report for which you will create the variant.
2. Enter the variable values to be saved.
3. Click the *Apply Variant* drop-down.
4. Select *Save Current Settings as New Variant*.
5. Enter the variant name (presumably a more meaningful name than that used in this example).
6. Click **Save**. A “successfully saved variant” message will display.

The screenshot shows a report configuration window with a table of variables. The 'Apply Variant' dropdown is open, showing options: 'None', 'Overwrite Variant with Current Settings', and 'Save Current Settings as New Variant'. The 'Save Current Settings as New Variant' option is highlighted with a red circle and the number 4. A red circle with the number 3 is next to the 'Apply Variant' dropdown itself. The table below has the following data:

Variables	Members Description
Fiscal Period/Year (eg.012/2011)*	DEC 2023
Business area	Charles River Campus
Fund	General Fund
Funded Program	...
Grant	The Student Center
GL Account	Enter the ID for a member

The 'Save As Variant' dialog box has the following fields:

Name *	Type	Technical Name *
variant123	Personal	Auto Generated

At the bottom, there are 'Save' and 'Cancel' buttons. A red circle with the number 5 is next to the 'Name' field, and a red circle with the number 6 is next to the 'Save' button.

Create a global variant

Follow steps 1-5 in *Create a local variant*.

6. Select *Global* in the *Type* drop-down.
7. Enter a *Technical Name*. (see note below)
8. Press **Save** to save the variant.

This global variant will now be available to any user whose security permissions are sufficient both to access this report and the data specified in the variant.

Technical Name note:

No specific format is required. However, here's a format that has proven popular among report users:

[your_org]-[your initials]-[description_of_your_variant]

[your org] is a few characters to identify your organization.

[your initials] helps to identify who created the variant.

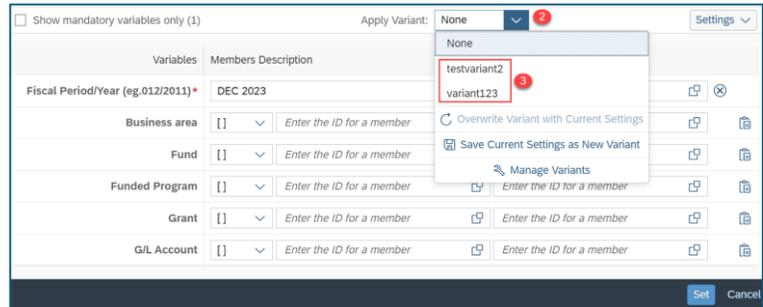
[description_of_your_variant] helps others who might use the variant understand what its purpose is.

For example, suppose Roger Rarebit is one of the grant managers in the Biomedical Engineering department. He might save a global variant with a technical name like this: "bme-rr-all active NSF and NIH grants"

Now, either Roger or members of his team can use that global variant to view NSF and NIH grants. This assumes they have access to the report for which the Variant was saved. Furthermore, which grants are displayed is a function of each team member's security permissions.

Run a report using a variant

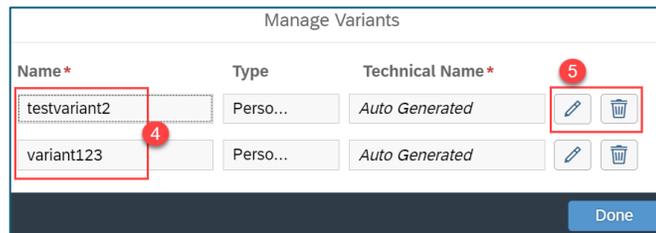
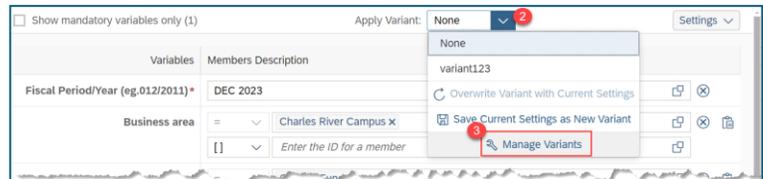
1. Run report.
2. Click the *Apply Variant* drop-down on the Variable Entry screen.
3. Select the variant to be used.
4. Once the variable values are entered, click **Set** to run the report.



Manage variants

Use *Manage Variants* to rename or delete an existing variant.

1. Run report.
2. Click the *Apply Variant* drop-down on the Variable Entry screen.
3. Select *Manage Variants*.
4. Select the variant.
5. Choose *rename* (the pencil) or *delete*.



This example assumes you have elected to rename the variant.

6. Rename the variant.
7. Use the check mark to save the change or click cancel.
8. Click **Done** to exit this function.

