Explore the General Accounting Infolets

* Once you open the lab, scroll down to Analytics and refresh as needed
* On the top right of each infolet, you can click the arrow to either hide it or edit the title
* If you do hide it, there is a button on the top right of analytics page where you can bring it back
* On certain infolets, if you hover the cursor over them, it shows additional info
* There is also front and back view to certain infolets. You can see that by clicking on the bottom left or bottom right of that infolet
* You can also expand that infolet by clicking on its bottom right
* In open subledgers infolet for example, there are 3 icons as well as more
* When you click on more, it takes you to a workspace. Over here, you can hover over any ledger and it will show additional info

Create an Account Group to Display on an Infolet and Account Monitor

* Go to the General Accounting Dashboard
* Make sure the data set is E360US DAS
* In Account Monitor, Click View > Account Group > Create
* Name: 99Travel Expenses
* Desc: for tracking airfare and meals
* display in: Expenses
* check both: set as default, and dynamically derive ledger
* time option: accounting period
* comparison option: Prior year ptd
* Access: private
* 
* 
* Click on the arrow next to Save in top right > Save and close
* Now you can see this as an infolet in home page under analytics
* Go back to general accounting dashboard
* In Account Monitor, Click View > Account Group > 99TravelExpenses
* Change the period to 12-22
* You can view the CC column if its not already visible by clicking on view>column>CC
* When you click on 400 under CC for the first row, it opens a detailed view
* Same thing for balances as well
* Click done to go back
* In the task panel on top right, you can click on inquire on detail balances. This is the same page as the one if you were to click on the balances

Use Account Inspector to Drill Down to an Account Balance

* Go to the General Accounting Dashboard
* Make sure the data set is E360US DAS
* In Account Monitor, Click View > Account Group > 99TravelExpenses
* Click on the task panel on the right
* Click on Inquire and Analyze Balances
* Click on the arrow next to Account Monitor
* Select Account Inspector
* Drag the US Primary Ledger from the right to the top left bar
* Drag the Accounting period from left to the right
* Change the Accounting Period to 01-11
* Click Refresh
* To Export it to Excel, click on the button underneath Account Inspector

View an Account Group from the Sunburst Tool

* Go to Others > Financial Reporting Center < Search 99Travel Expenses in ALL
* Click and open it
* On the right there is a SHOW OR HIDE SEGMENT button that allows you to filter and select only that info that you’re interested in seeing in the Sunburst
* Check the Account, Description
* Uncheck product and intercompany
* Change the period to 06-22
* Click on VIEW AS SUNBURST