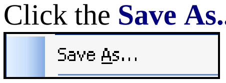
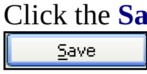
Using the Transaction Detail Page (08/07/08)

1.	Click the **RAVEN Inquiry** link. RAVEN Inquiry
2.	Click the **Search** button. Search
3.	Close the menu to give yourself maximum space for working and viewing data. Click the **Menu Collapse** button.
4.	Click the **Transaction Detail** link. Transaction Detail
5.	When using Transaction Detail page, select the appropriate entries for the following areas: -- **View ID** -- **Fiscal Year** -- **Calendar Month Range** including **Thru** date -- **Chartfield** criteria -- **Amount Type** (Actuals, Pre-encumbrance, Encumbrance, or All) -- **Source** (if searching for only one type of transaction)
6.	In this example, we want to retrieve data that will allow us to review year-to-date transactions, including all **Amount Types** and all **Sources**. Since we are looking at the data on a fiscal year basis - even our grant data - we will use **View ID** = All Activity by FY. Let's set up the inquiry.
7.	First, clear the Transaction Detail page of any prior settings. Click the **Restore Defaults** button.
8.	By default, the **View ID** is **All Activity by FY** and the **Fiscal Year** is the current FY - 2008 for this example. Set the time range. Click the **Calendar Month Range** list. 2008-06 June

9.	Select the first month of the fiscal year. Click the **2007-07 July** list item. 2007-07 July
10.	Select the Thru month - June 2008 for this example. Click the **2008-06 June** list item. 2008-06 June
11.	Next enter the **Owner Department**. If you have RAVEN access to one - and only one - **Department ID**, you will not need to complete this step. If you have access to more than one **Department ID** determine which data you need to retrieve and specify the appropriate **Owner Department**, **Project** or **Award**. In this example, we need to enter an **Owner Department**. Double-click in the **Owner Dept** field. UMB
12.	Enter the desired information into the **Owner Dept** field. Enter a valid value e.g. "**10213000**".
13.	Click the ***Amount Type** list. Actuals
14.	The **Amount Type** area allows you to customize your inquiry to retrieve Actuals, Encumbrance, Pre-encumbrance or **All Amount Types**. In this example we will retrieve **All Amount Types**. Click the **All Amount Types** entry in the list. All Amount Types
15.	Click the **Fetch** button. Fetch
16.	The detailed data is available for download. Data is divided across 3 tabs. The download includes only data that is displayed on-screen. To download data from all 3 tabs, display all tabs on-screen. Click the **Show all columns** button.
17.	Move to the far right side of the page to locate the **Download** button. Click to the right of the **Horizontal Scrollbar**.

18.	Click the **Download** button. 
19.	Click the **Save** button. 
20.	Name your file and save it to the desired location. Enter the desired information into the **File name** field. Enter "**TransactionDetailDownload_062708**".
21.	Click the **Save** button. 
22.	On some computers, saving a file directly from RAVEN to Excel saves a Web Page version of the file. (This sometimes occurs even though the File Type shows as 'Microsoft Excel Workbook'.) If this is true for your computer, open the file in Excel and save it in the desired format. Click the **Open** button. 
23.	Click the **Save As...** list item. 
24.	Depending on the work you are doing, you may wish to save RAVEN data as an Excel workbook. Further sorting, grouping and analysis are then completed using Excel's tools. If you wish to save your file as an Excel workbook, select Save as type: Microsoft Office Excel Workbook. However, if you are transferring RAVEN data to another database, you may need to save the file in CSV format (comma-delimited values). In this example, we will save the file in CSV format.
25.	Click the button to the right of the **Save As type** field. 
26.	For this example, select CSV for MS-DOS. Click the **CSV (MS-DOS)** list item. 
27.	Click the **Save** button. 

28.	If you wish to use the same filename, confirm that you want to replace the existing file. Click the **Yes** button. 
29.	Confirm that you wish to keep the workbook in CSV format. Click the **Yes** button. 
30.	You're done! In a few simple steps you have learned to -- set up a RAVEN inquiry from the Transaction Detail page -- retrieve and download detail data -- save your file to Excel as a workbook or in CSV format You are now ready to analyze. **End of Procedure.**