Accessing Reports (cont.)

General Steps for Accessing All Reports

1. Access the Budget tab in Duke@Work as follows:
   - Log into work.duke.edu (do Not type in http://www.).
   - Click on the Budget tab.

2. Once on the Budget tab, use either method to navigate and access a report, as follows:
   - Click on the underlined link for Reports.
   - OR
   - In the left Detailed Navigation pane, click on the Twistee icon beside Reports and continue to use the Twistee icons to locate the desired report.

Note: Both methods are outlined in the next steps of this guide.
Accessing Reports (cont.)

Using the Detailed Navigation Pane

1. If the Detailed Navigation pane is not showing on the left side of the screen, use the **Expand navigation pane** (right arrow) icon to open the pane.

2. Use the **Detailed Navigation** (on left) and click on the **Twistee** icon beside **Reports** to open that folder.

3. Continue to click on the Twistee icons to open the report types to open those folders, for example **Budget Reports**.

4. From the list, **click on the report title** to select the desired report (a screen will open with fields for report selections).
1. Once you’ve clicked on Reports from the Budget home page, click on the desired **underlined name link for the type of the report** as follows:

- **Budget Reports** – summarized reports for Budget Development of Non-Position, Position Reports, and Workflow Reports used to analyze the data entered for the new year’s budget.
- **Budget Modification Reports** – reports to analyze the data entered for budget modifications as needed.
- **Projection Reports** – reports to analyze the data entered for Fall, Spring, or Working Projections as needed.
- **Prior Year Reports** = archived reports to use as reference to the prior year’s budget.

Note: The examples shown in the guide are for Budget Development Reports.
2. Continue to click on the underlined link for the type of desired reports – choices will vary by type of report chosen in the last step (in this example, the choices are Budget Development Summary Reports which includes Non-Position reports, Position Reports, and Workflow Reports).

3. Review the reports listed with brief descriptions and notice the icon:
   - = SAP Business Warehouse (BW) based reports provide functionality for different ways of viewing the data (filters, click and drag features, etc.).
   - = Reports with Comments (Crystal based) provide a presentation quality (PDF) format for printing and presenting as needed, and typically provide comments.

4. Select the desired report by clicking on the underlined title (a screen will open with fields for report selections).

   Note: If prompted by a security message, click Yes to continue to the next page.