Accessing Reports

About the Budget Tool Reports

The Budget tool offers a series of reports that allow users to review and analyze their Budget Development, Budget Modifications, Projections, and Workflow data. In addition, the tool provides a link to archived BPS reports as reference to the prior year's budget.

There are two basic types of report formats:

- **SAP Business Warehouse (BW) Reports** = indicated by a  symbol beside the report link, this type of report provides BW functionality for different ways of viewing the data (filters, click and drag features, etc.).

- **Reports with Comments (Crystal based)** = indicated by a  symbol beside the report link, this report has a presentation quality format for printing and presenting as needed. These reports typically provide the Comments entered in various layouts.

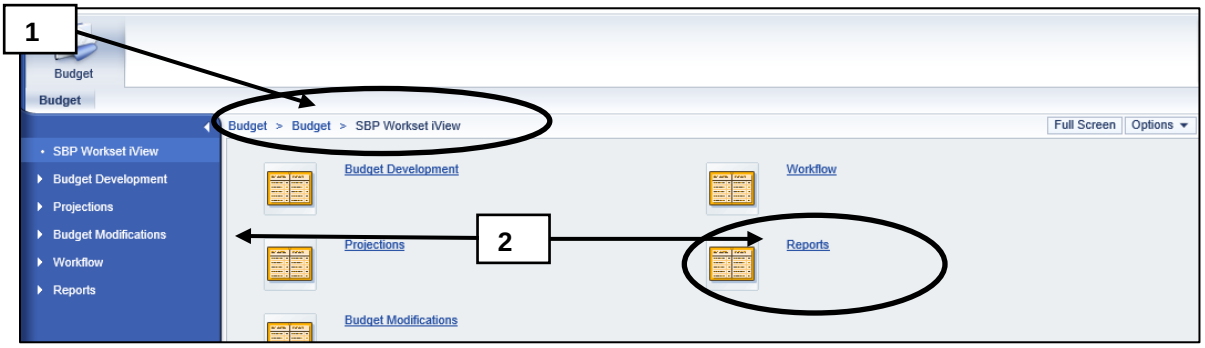
Accessing the reports is the same. However, the steps for selecting the criteria and generating a report are different between the SAP Business Warehouse (BW) based reports and reports with comments (Crystal based).

This guide covers the steps related to both types of reports.

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.



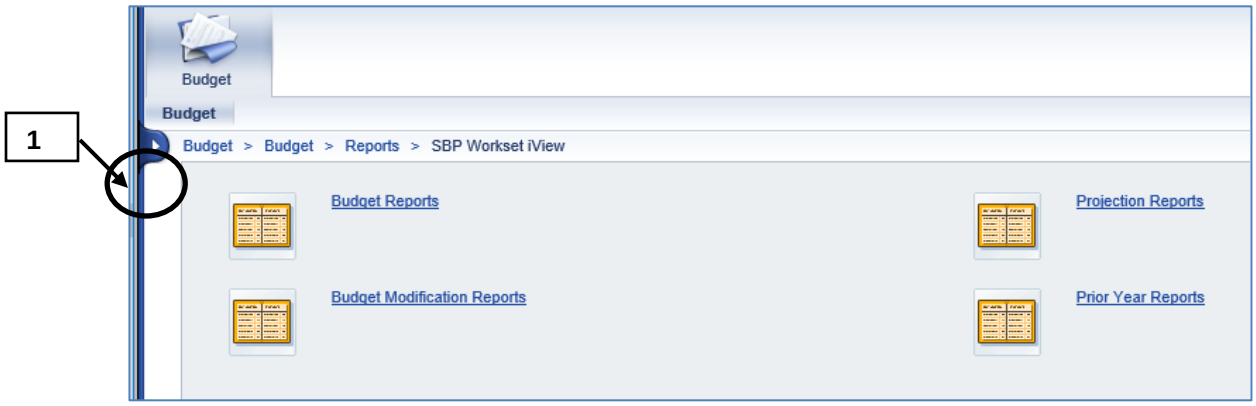
2. Once on the Budget tab, use either method to navigate and access a report, as follows:
   - Click on the underlined link for **Reports**.

     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.

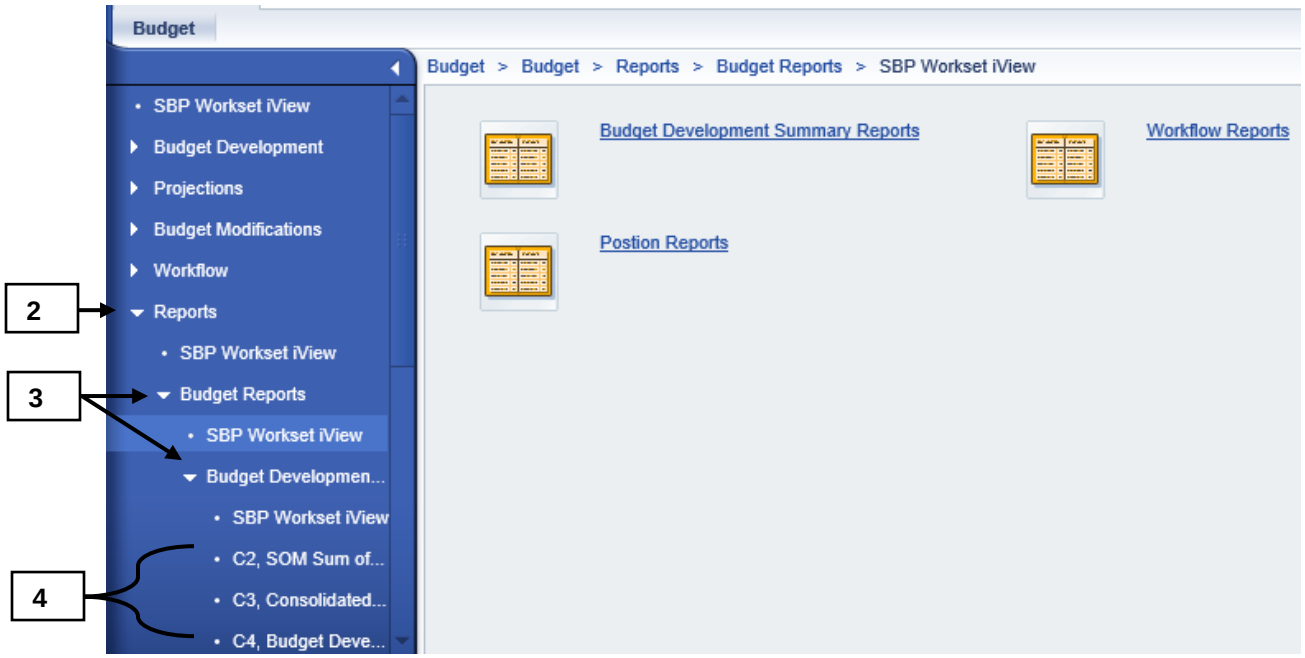
   Note: Both methods are outlined in the next steps of this guide.

Accessing Reports (cont.)

Using the Detailed Navigation Pane



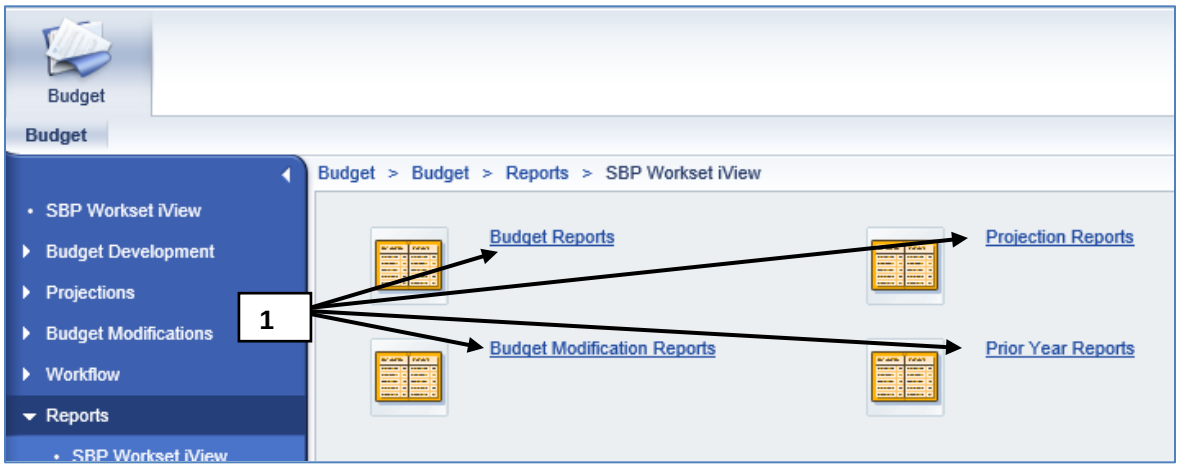
1. If the Detailed Navigation pane is not showing on the left side of the screen, use the **Expand navigation pane** (right arrow) icon to open the pane.



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).

Accessing Reports (cont.)

Using the Underlined Links



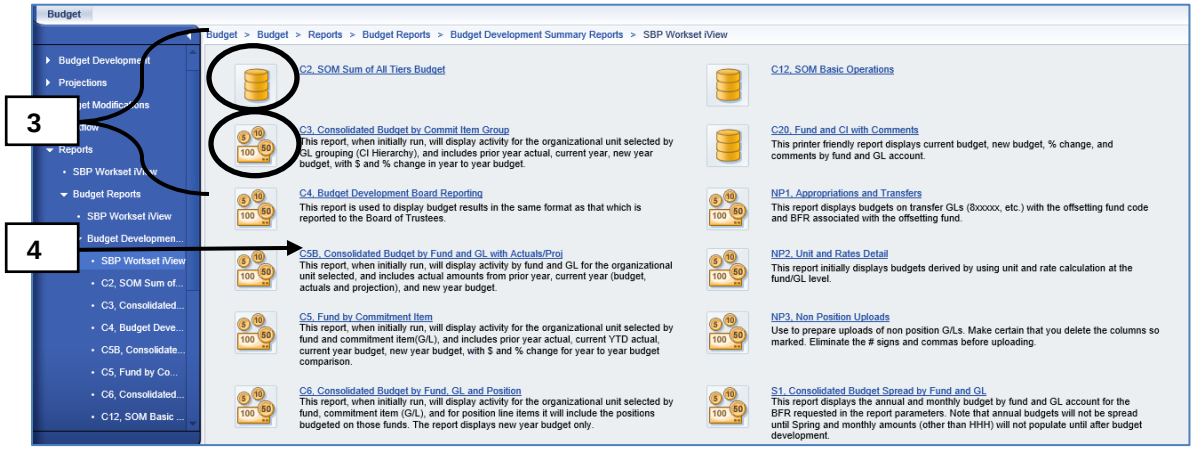
1. Once you've clicked on Reports from the Budget home page, click on the desired **underlined name link for the type of the report** as follows:

   - **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.

Accessing Reports (cont.)

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.*