Notes: Reports with Comments (Crystal based) are denoted with the symbol beside the report link and are displayed in a more printer friendly PDF format. The most frequently used fields for selection of the data for these reports are outlined in this section of the guide. The input fields and the order of the fields may vary by report.

1. To access reports with comments that are denoted with the icon, click on the underlined link for the desired report (use descriptions listed under each link to help with choosing the desired report).
2. Review the fields available for selecting the data to be included in the report and note the following:

- The selection fields listed will vary by report.

- Each selection field is displayed in a separate shaded section (if sections are not open, use the individual “twistee” icon to the far left of each section to open or click on the **Expand All** button).

- **ALWAYS** use the ... **Drop-down** button to select a value from a “Picklist” box in the **New value:** field (entering a value in this field does not work well, so the Drop-down is recommended).

- When the **Drop-down** button is used to select a value, the value will automatically update to the **Current value:** field and represents the value that will be used to select and generate data for the report.

- The **Set to null checkbox** is used to display a check mark which basically selects all the available values for that field (as applicable per other fields like the **Org Unit** field (BFR Code or HR Org Unit).

- Review the more commonly used Projection report fields below for more on specific details.

- See examples outlined on next pages.
3. To select the **level of BFR Code/ HR Org Unit desired** for the report, click on the **... Drop-down** button for the **Org Unit** field to display a Pick List.
4. Open folders with the + icons to find your organization and choose a BFR Code value as desired (all funds for the Org. Unit will be included unless the Fund Multi Single Value field option is available and shown in later steps).

5. Click on the Org. Unit (BFR Code) to be selected for the report (once cursor is placed on the Org. Unit an underlined link appears).

6. Verify the correct Org. Unit is now displayed in the Current Values: field.
7. In the Version (A or B) section, use the **Drop-down** button and select the appropriate Version for the report and verify the version is displayed in the Current Value: field.

8. For the **Fund Multi Single Value** option if applicable:
   - To select the report for a single fund or funds within the Org. Unit selected, click on the **Drop-down** button and choose the fund (tip: click on the **Technical Names** button in the upper right corner to add the 7 digit cost objects to the Picklist for reference).
   OR
   - To select all funds associated with a selected Org. Unit / BFR Code, leave the check in the checkbox beside **Set to Null** to keep the defaulted **Current value: Null**.

9. Once all fields are entered as desired, click on the **Execute** button at the top of the window to generate the report.

   Note:  As a reminder, the input fields and the order of the fields may vary by report.
10. Once in the report, use the **Group Tree** button to the left of the report to display a list of cost objects / funds included in the report and click on a fund to navigate to that fund in the report (split window may be sized through the click and drag function).

11. Use the **Refresh** button at the top left to update the selection for the report as needed.

12. Use the **Export** button to both export AND print as needed. To print, export the file to PDF format and then print.

**Note:** Be sure to adjust (add websites to allow security) or turn off pop-up blocker settings as needed in order to use this type of report.