Tips for Selecting Criteria for the Endowment Reports

On the selection screens for each Endowment related report, please review the tips below for selecting values for some common fields that are required to generate the reports.

To select values for fields on these types of reports:

1. Note that an * (asterisk) indicates the field is required.

2. To select all values available for a field, leave the field blank (do not enter a value in the field).

3. Use the Drop-down icon on the right side of a field to search for the acceptable values as needed (see next steps).

4. Click on the Check button to verify all the fields entered contain acceptable values.

5. Click on the OK button to generate the report.

Note: Each report is outlined in this Guide, including the selection fields available and more details about selecting data for the specific fields.
To enter ranges of values into applicable fields for these types of reports:

1. Enter the first value of the desired range.
2. Enter a space (Enter key).
3. Enter a – (Dash mark).
4. Enter another space (Enter key).
5. Enter the last value of the desired range (finished entry example: 25 – 49 or 0010 – 0020).
6. Remember to use the Check button to verify all fields contain acceptable values in the correct format.

Note: See examples above of ranges entered in the EIA Customer field and Company Code field. Unless indicated, any field will accept ranges. For instance, Fiscal Year and Posting Period indicate that only single values are an option.
To choose values for a field via the Drop-down icon:

1. Click on the **Drop-down** icon in the right side of the field – see next steps for two typical examples - 1) Fund Category and 2) Duke Cost Object Hierarchy.

Example 1 – **Select Values for Fund Category** (or other fields that have a list of acceptable values and a search feature):

2. Ensure the value of **All** is displayed in the **Show view:** field (or drop-down and choose **Search** if desired, then use the resulting search box to find a value).
3. In the All section on the left side of the screen, review the list of values and scroll down to find the Endowment related values.

4. Identify the value(s) to be selected and click on the box(es) to the left of the desired row to select.

   *Note:* To select more than one value on the left side, simply click on the boxes desired. To select a range, use the Shift key to select a beginning and ending range.

5. Click on the Add button to display the selected value(s) in the Selections section on the right side of the screen.

6. Ensure that the desired value(s) are now displayed on the right side of the screen under the Selections section.

7. Click the OK button to close this window and populate the value(s) chosen into the field on the previous selection screen.
Example 2 – Select Values for Duke Cost Object Hierarchy (or other fields that have folders of organized values):

8. In the *All* section on the left side of the screen, click on the **Twistee arrow** icons to open folders and find the **level of the organization to be selected** (folders listed depend on your security rights to view that organization).

9. Identify the value(s) to be selected and click on the **actual row** to select.

   
   *Note:* To **select more than one value** on the left side, simply click on the rows desired.

10. Click on the **Add** button to display the selected value(s) in the **Selections** section on the right side of the screen.

11. Ensure that the **desired value(s) are now displayed on the right side** of the screen under the **Selections** section.

12. Click the **OK** button to close this window and populate the value(s) chosen into the field on the previous selection screen.
To save a selection screen variant:

Note: A selection screen variant allows you to populate the selection fields and save that data as a named variant for future use. A variant saves keystrokes by populating the data, and can be changed or deleted as needed.

1. Enter values in the selection fields as desired (remember to use the Check button to ensure values are acceptable).

2. In the Available Variants: field, click on the Save As… button.

3. In the Save Variant window:
   - Ensure a check mark is displayed in the the Save As User Variant check box.
   - Enter a name for the variant in the Description field (free text, enter a relevant name to help you identify the variant.

4. Click on the OK button to complete the save process.
To use a selection screen variant on a selection screen:

1. Click on the **Drop-down** button in the **Available Variants** input field to view the available variants.

2. Click on the **variant name/description** to choose the variant and populate the data in the selection fields below.

3. Review the populated selection fields and adjust the data as needed.
Tips for Selecting Criteria (cont.)

To change or delete a selection screen variant:

Note: A selection screen variant allows you to populate the selection fields and save that data as a named variant for future use. A variant saves keystrokes by populating the data, and can be changed or deleted as needed.

1. Click on the **Drop-down** button in the **Available Variants** input field to view the available variants.

2. Click on the **variant name/description** to choose the variant to be changed or deleted.
3. To change the variant, make any adjustments to the fields that are populated.

4. Click on the Save button to update the variant (to create a new variant use the Save As… button and provide a new name).

5. To delete the variant, simply ensure the correct variant is displayed and click on the Delete button (this option will remove the variant from the Available Variants list).

Note: Use caution when deleting a variant. The Delete function removes the variant from the Available Variants list and cannot be undone.