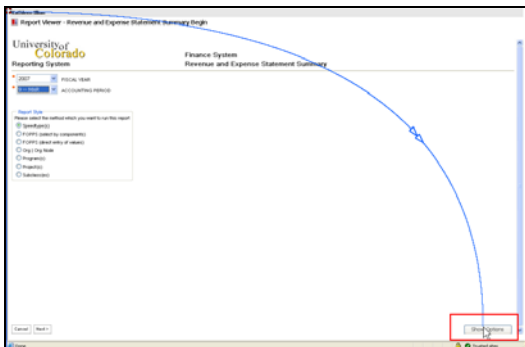


1. Style and Filter Options



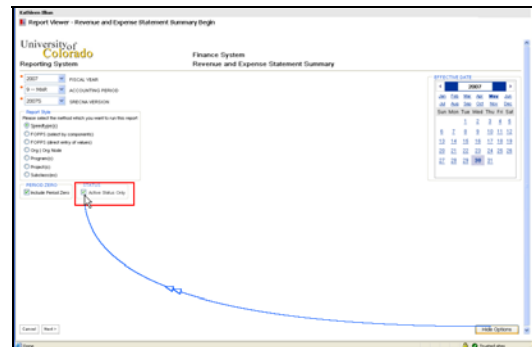
2. Introduction

In this movie we'll look at the wide variety of options you have with respect to filtering your report.



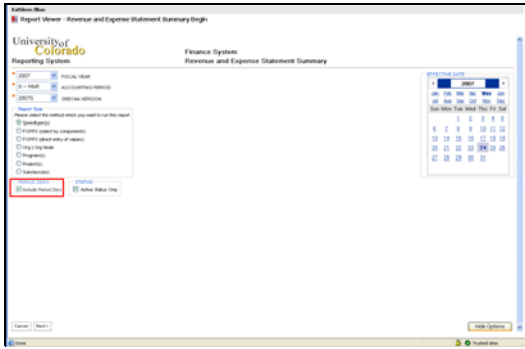
3. Active/Inactive Values

First, you'll need to decide if you want to include inactive values in your search. By default, the Reporting System only runs reports for "active" values unless you indicate otherwise. You can include inactive values by selecting the "Show Options" button:



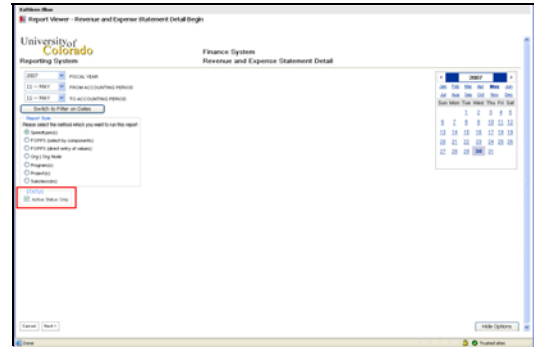
4. Active Status Only Checkbox

Deselect the "Active Status Only" check box.



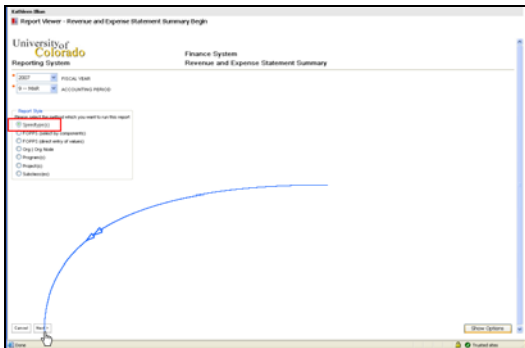
5. Period Zero Checkbox

For a summary report, you can also deselect the "Include Period Zero" checkbox to exclude Period Zero, which is the accounting period that represents prior-year rollforward balances. You'll always want to include period zero, because to deselect it will give you an incomplete financial picture.



6. Period Zero for Detail Reports

For detail reports, deselecting period zero is not an option, so the only option you'll have is to include inactive values.



7. Running By Speedtype(s)

Run the report by Speedtype(s), the default value. Click the Next > button.



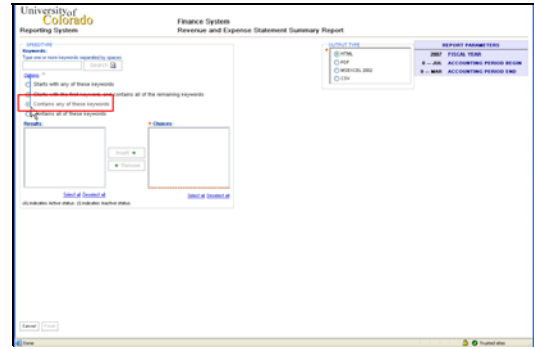
8. Entering Speedtype Values

There are several different ways to enter the speedtype information; you could enter a single speedtype value in the Keyword search box, multiple speedtype values separated by a space, or you can look up one or more speedtypes you'd like to run.



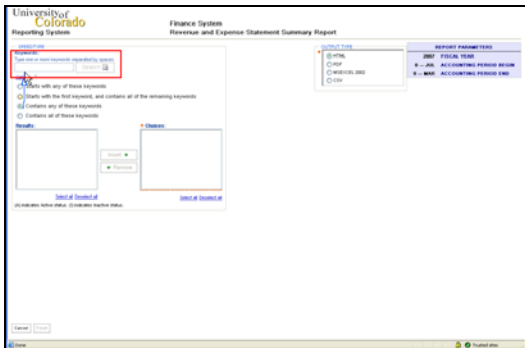
9. Looking Up Speedtypes

To look up speedtypes, select the Options link:



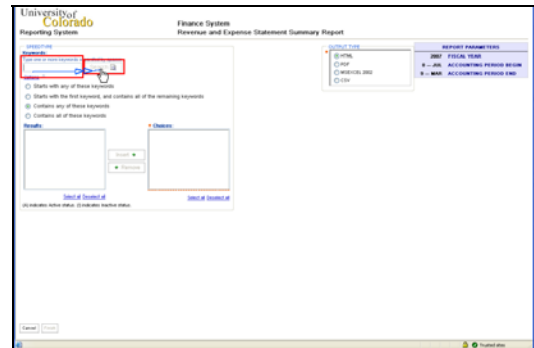
10. Using "Contains Keywords" Parameter

There are several options. Choose the "Contains any of these keywords" radio button.



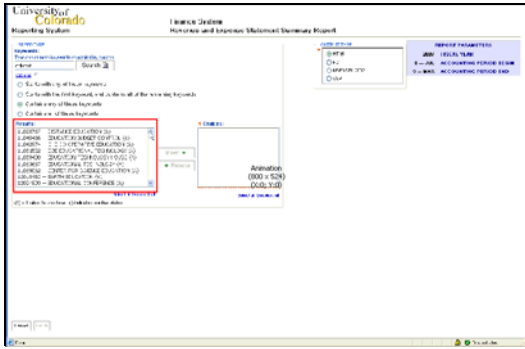
11. Entering a Search Term

Enter a search term in the Keyword search box.



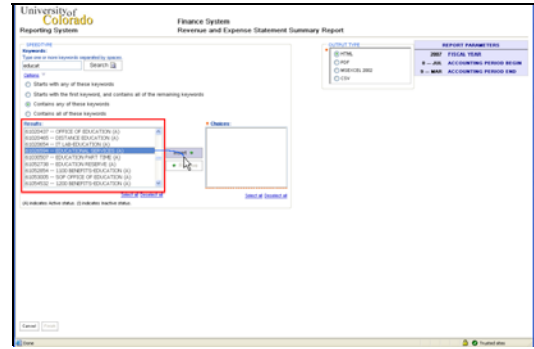
12. Searching for a Value

Click the Search button to view the results.



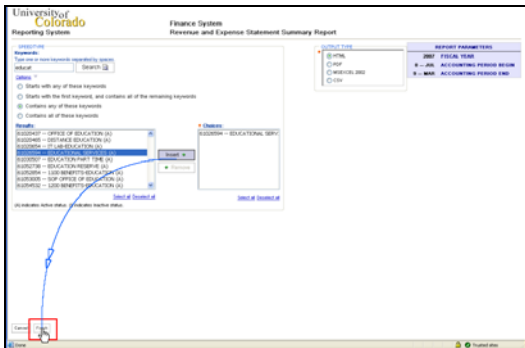
13. Viewing Results

Scroll through the results list to find the values you're looking for.



14. Inserting Results Into Choices

Once you've found the speedtype you're looking for, select it and click the Insert button. To select more than one speedtype, you can hold the Ctrl key down to select the others, or use the Shift key if the speedtypes are listed contiguously.



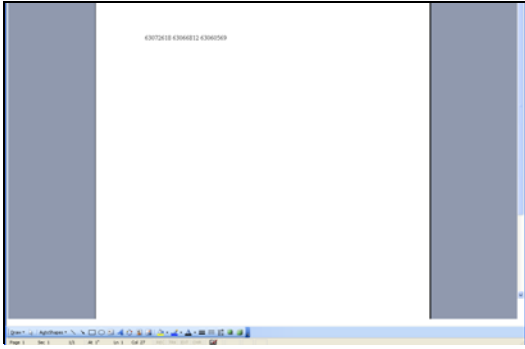
15. Finishing Your Selections

Once we've finalized our choices, we'll click the Finish button.



16. Running Multiple Speedtypes

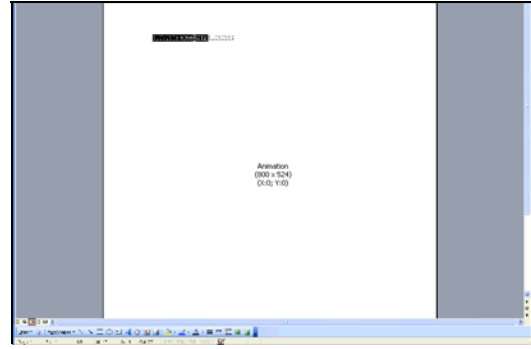
If you want to run multiple speedtypes - let's say you have a number of speedtypes for which you run reports each month - you can paste them from a word document in which you've entered the speedtypes with a space between each one:



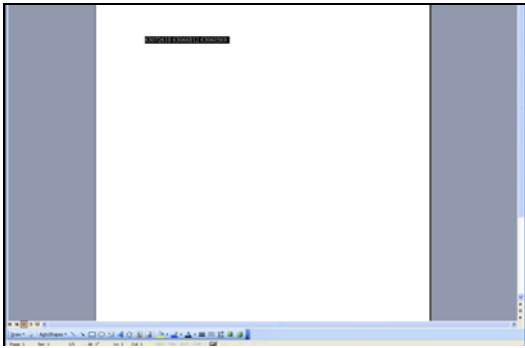
17. Copying Speedtypes From MS Word

Open your word document and select the speedtypes (Ctrl or Cmd A to select all). Then edit-->copy, Ctrl C or Cmd C to copy all.

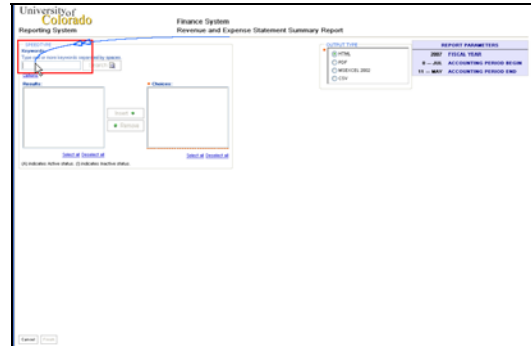
You will not be able to copy and paste from an excel spreadsheet unless the values are in a single cell, separated by a space. Make sure you have not entered any commas or other punctuation between the values - just spaces - and make sure you do not press enter after each row, just let the text wrap.



18. Selecting Speedtypes



19. Selecting All



20. Pasting All

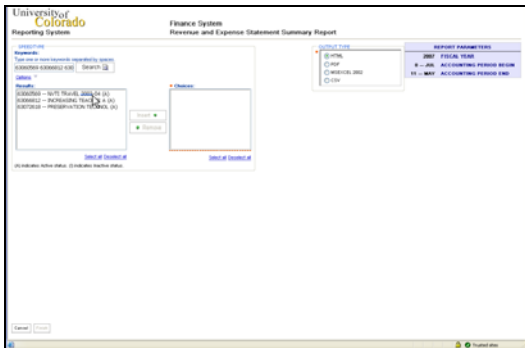
Paste the selection into the Keyword search box (Ctrl or Cmd V).



21. Searching for Multiple Values
Click the Search button.



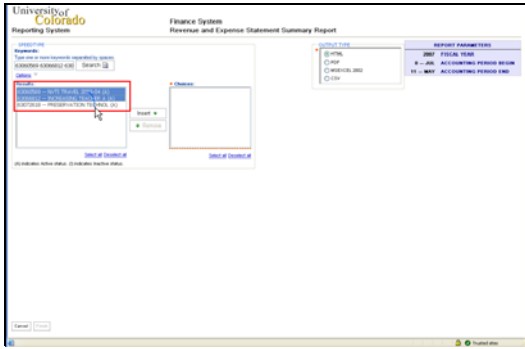
22. Viewing Multiple Results
All of the speedtypes will appear in the results box.



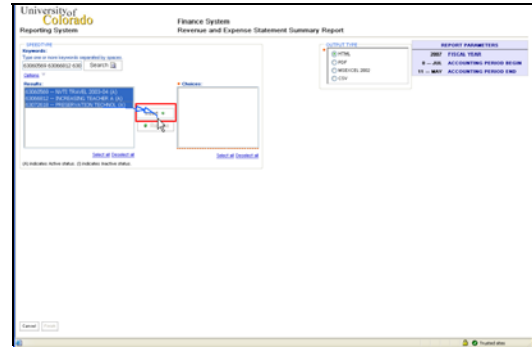
23. Selecting One or More Results
Select the first item.



24. Selecting Using Shift Key
And holding the shift key down, select the others:

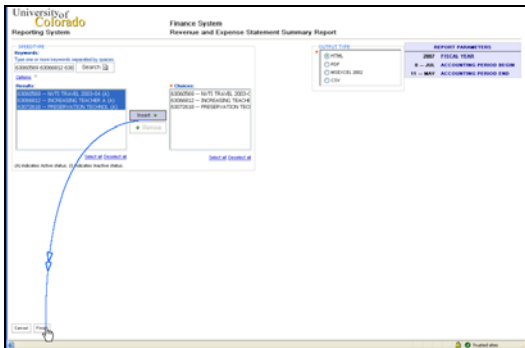


25. Selecting All Values



26. Inserting Multiple Values

Click the Insert button



27. Finishing Choices

Click the Finish button.

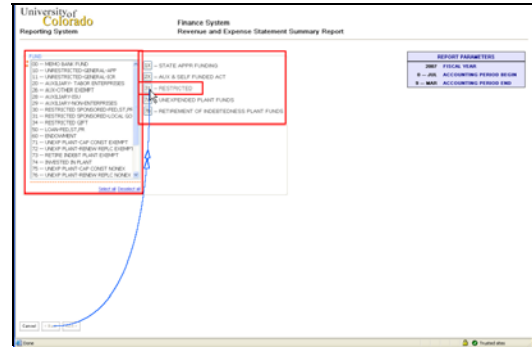


28. Searching By FOPP(S) Components

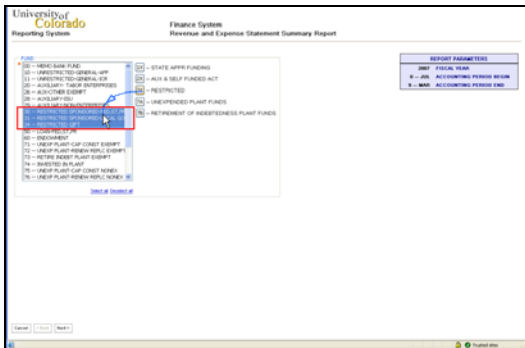
If you'd like to look up a program or project by its FOPP(S) values, you can select FOPPS (select by components).



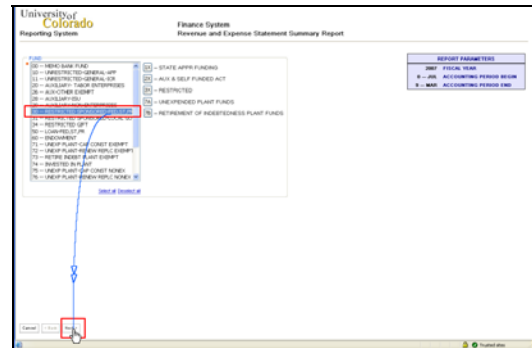
29. FOPP(S) Components Step 2
Click the Next > button.



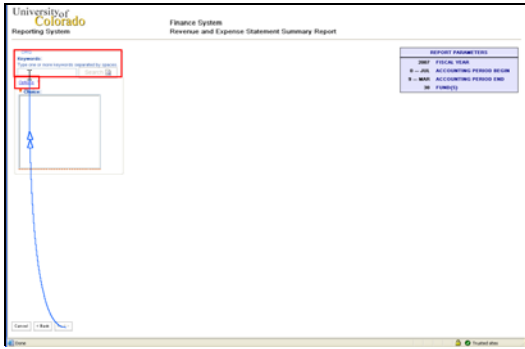
30. Selecting the Fund
First, select the fund. You can select any single fund value, multiple funds by using Ctrl and / or Shift, or you can select a fund group by clicking the 1X, 2X, 3X etc buttons. We'll select the 3X button.



31. Selecting Fund Group
Notice that all restricted funds are selected. Limit the selection to fund 30 by selecting that value.

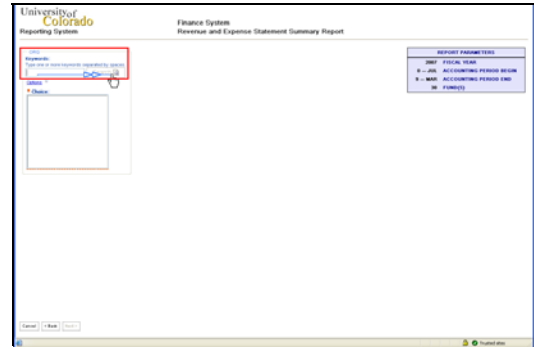


32. FOPP(S) Components Step 3
Click the Next > button.



33. Selecting ORG Value

Select the org value. You can use the options button to enter a keyword, or you can just enter the org in the keyword search box.



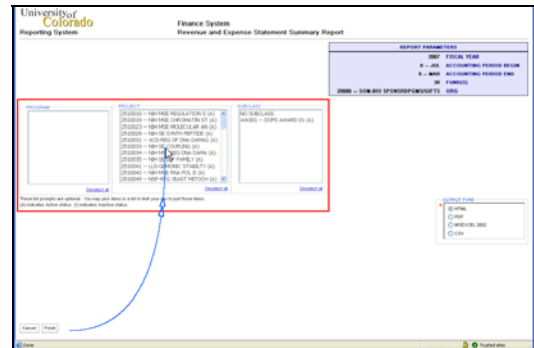
34. Entering ORG Value

Enter the org number and click search.



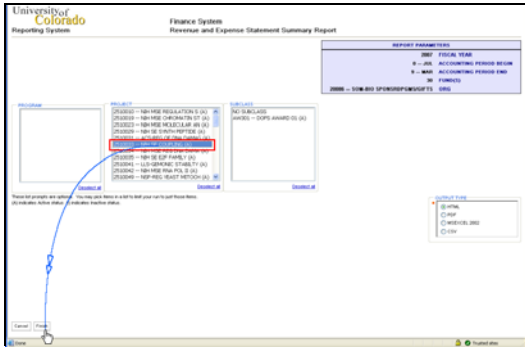
35. FOPPS(S) Components Step 3

Once the system displays the value, click Next >.



36. Viewing List of Values

You'll see a list of programs, projects, and subclasses in that org.



37. Making Selection

Select the project you want and click Finish to run the report.

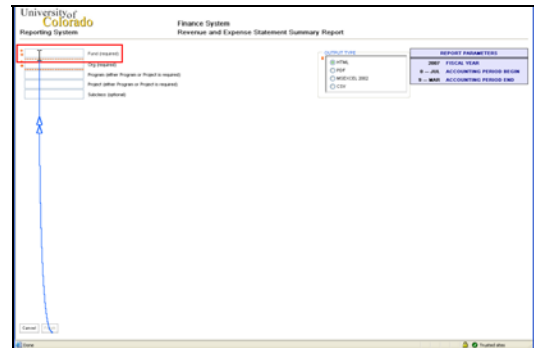


38. Direct-Entering FOPP(S) Values

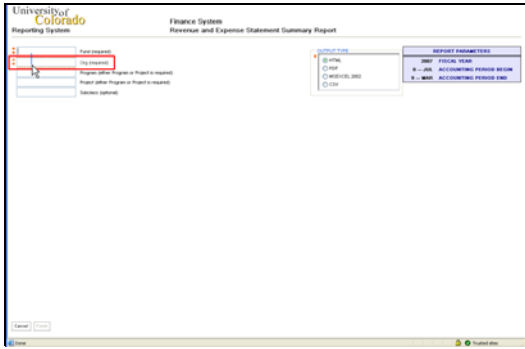
You can also choose to enter your FOPPs information directly rather than looking up the values.



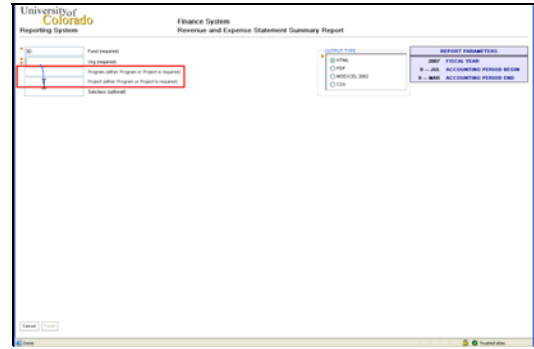
39. Direct-Entering Step 2
Click the Next > button.



40. Entering the Fund
Enter the fund.



41. Entering the ORG
Enter the org.



42. Entering the Program/Project
Enter the program or project.



43. Finishing
Click the Finish button



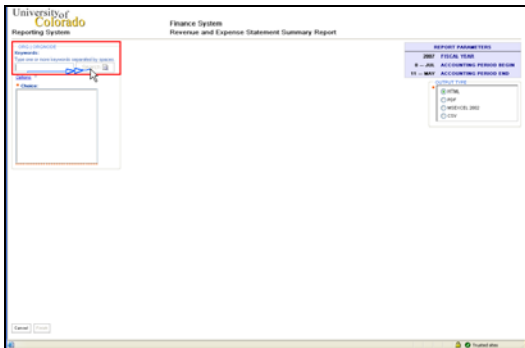
44. Entering ORG/ORG Node
You can run reports by org number (or org node) by selecting that option.



45. Entering ORG/ORG Node Step 2
Click the Next > button.



46. ORG Entry Options
You can use the options link to search by keyword. Enter the org number in the keyword search box.



47. Entering ORG/ORG Node Step 3
Click the Search button.



48. Selecting ORG Value and Finishing
With the value already selected, click the Finish button.



49. Running by Program(s)

You can run a report by Program or Programs by selecting that option.



50. Running by Project(s)

By Project or Projects...



51. Running by Subclass(es)

Or by subclass(es).



52. Conclusion

Regardless of the report style, the keyword and multiple value search options are available for you.



Slide 53

Text Captions: Thank you for viewing this presentation.
Please select the appropriate button below to proceed.