Reports

Navigate to Reports → Global Reports → Choose Folder → Choose Report

Selecting search criteria (Committed Spend vs. Budget)

- **Selection criteria**
  - Fund acct like: Y
  - Cost acct like: RC
  - Project between: and
  - Subproject between: G0115-02 and G0125-02
  - Cost line like: ZZ
  - Period between: 201201 and 201212
  - Company like: SU

1. All reports have an area where you can filter the potential results using available criteria. Use Field Help to help you find desired codes.

2. Most report have an area with pre-defined search criteria. These cannot be changed.

When all criteria has been entered, click **Search** to populate your result.

⚠️ Be careful when running a search with no criteria at all – this could produce a lot of results and take a while to load.

Viewing the results – (Purchase Order Detail example)

1. Navigate to Reports → Global Reports → Choose Folder → Choose Report.
2. Be careful when running a search with no criteria at all – this could produce a lot of results and take a while to load.

The results can be further filtered by entering text directly into the white header fields and clicking **Search** again. Any values in blue are links – clicking on these will open a window showing further information.

Common options (details overleaf)

- **Choose Columns** - Opens a window where you can deselect columns you don’t wish to see.
- **Copy to clipboard** - Copies all the results from the current screen (however many rows you have set) for pasting into excel.
- **Detail Level** - If subtotals are in place you can select the subtotal level to view.
- **Rows per page** - Defaults to 50 – change to see more rows on 1 page or if Copying to excel. Maximum is 500 rows.
Reports

Modifying report results

The search results are shown in the table, under the pre-defined column headings.

To select which columns are visible, click Choose columns. The Choose columns window appears. Click in a tick box to add or remove a tick. Only ticked columns will show in the report table.

Click OK to see your report.

The Selection criteria section is minimised after Search is clicked. Click the words Selection criteria to maximise the section of the screen. To view different results, enter new criteria and click Search to run the new report.

If the report has more than one detail level, adjust the view by clicking in the Detail level field. The report updates immediately.

To adjust the number of rows visible on the screen click in the Rows per page field. The report updates immediately.

Exporting report results to Excel

With the report results showing on screen click Copy to clipboard. Open a new workbook or tab in Excel, click in a cell and right-click the mouse. Select Paste.

Note that only the report rows showing on screen are copied. Either adjust the Rows per page on the report screen or copy each page of results into Excel separately.

For help and support please email rt-finance-agresso@sussex.ac.uk