

How-To Filter and Run a Report

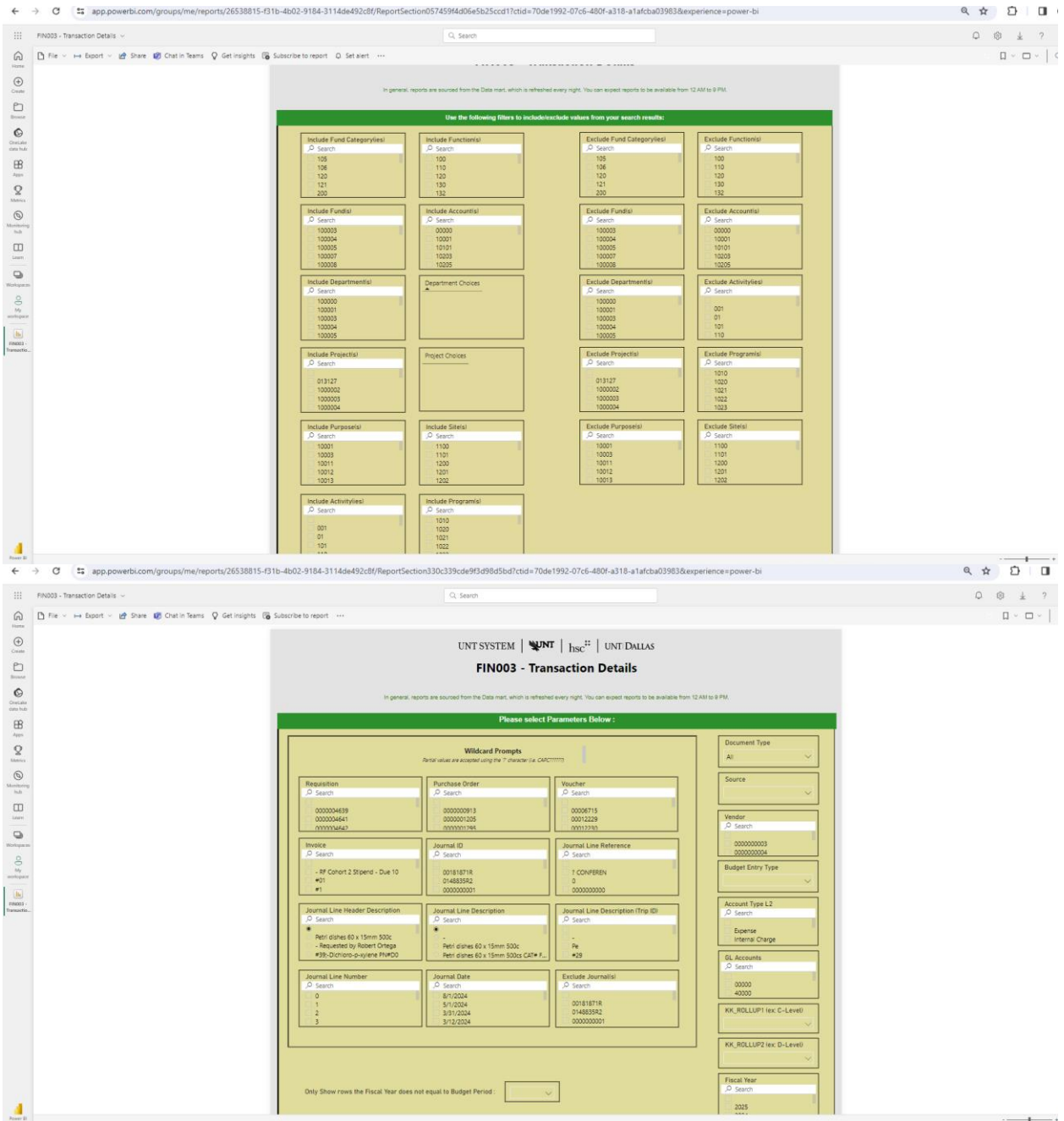
- Various Report Prompts allow users to filter results.
- Prompt Types
 - Multi-Select Search
 - Drop Down
 - Radio Button
 - Text Box (only some numeric value prompts)
- Some prompts have default selections.
- Depending on what kind of report you're trying to view or run, select your filters accordingly in each section:

The screenshot shows the 'FIN003 - Transaction Details' report interface. The main heading is 'Please select Parameters Below'. The interface is divided into several sections for filtering:

- Business Unit:** A dropdown menu set to 'All Business Units'.
- Department or Manager:** A search box and a list of departments including '100000 - Office of the President (Smatrek, Neil ...)', '100001 - Division of Planning (Rohove,Debbie A.)', '100003 - Pres Gen (DumLouis, Agnes)', '100004 - Pres Events Management (Wheeler,Me...)', '100005 - State Emps Charitable Camp (Condray,...)', and '100100 - Univ Integrity and Compliance (Simme...)'.
- Project ID/Description or Manager Name:** A search box and a list of projects including '101327 - NIA Cunningham (03/17)', '100002 - Stadium (Smatrek,Neil Joseph)', '100003 - Shuttle Buses (Ranton,Brandi Lea)', '100004 - Chestnut Hill Project (With (Smatrek...)', '100005 - Auxiliary Svcs Project Clear (Omand,...)', '100012 - Bruce Hall-HAC (Omand,Erica Kri...', and '100015 - Reserve Hall (The Sororities (Oma...'.
- Show/Hide Zero Values:** A dropdown menu set to 'Do not show values that sum to zero'.
- Budget Period:** A dropdown menu set to '2024'.
- Department Choices:** An empty dropdown menu.
- Project Choices:** An empty dropdown menu.
- Accounting System:** A dropdown menu set to 'All'.
- Account Type:** A dropdown menu with 'Revenue' and 'Expense' selected.
- Category:** A dropdown menu with 'Budgetary', 'Non-Budgetary', 'Non-Sponsored Projects', and 'Sponsored Projects' selected.
- Amount Type:** A dropdown menu set to 'All'.
- Transaction Type:** A dropdown menu set to 'Amount Type'.
- Project Status:** A dropdown menu set to 'Exclude Inactive Project'.
- Sort Order:** A dropdown menu set to 'Time Stamp'.
- Sort By:** A dropdown menu set to 'Desc'.

At the bottom of the form, there are 'Finish' and 'Next >' buttons. A note at the bottom states: '* Chartfield combination that sum to zero have been excluded from the report. To view that information, use the Transaction Detail Report.'

- Navigate between prompt/filters pages using “Next” and “Back.”



- After choosing your filters, run the output report with "Finish."

- Click “Back to Prompts” to go back to filters page.

The screenshot displays a Power BI report interface for 'Transaction Details' from the UNT SYSTEM. The report is for the Budget Period of 2024. At the top, there are several control panels: 'Sort Order' set to 'Time Stamp', 'Sort Type' set to 'Desc', 'Show/Hide Zero Values' set to 'Do not show value(s) that sum to zero', and 'Closing Adjustments' set to 'Include Closing Adjustments'. A 'Back to Prompts' button is highlighted with a red box. Below these controls, the report title 'UNT SYSTEM Transaction Details' is shown. The main content is a table with the following columns: Business Unit, Department, Department Descr, Fund Category, Fund Category Descr, Fund, Fund Descr, Function, and Function. The table contains multiple rows of transaction data, including entries for various departments like Information Technology, Gen University-System, Budget & Planning, and Communications and Marketing, with associated fund categories and descriptions.

Business Unit	Department	Department Descr	Fund Category	Fund Category Descr	Fund	Fund Descr	Function	Function
SY769	925000	Information Technology	200	Designated Operating-Managed	830040	Designated Op - Shared Svc	550	Institutional Supp
SY769	999999	Gen University-System	701	Net Investment in Plant	187020	RFS Bonds Ser '18B	550	Institutional Supp
SY769	999999	Gen University-System	701	Net Investment in Plant	187019	RFS Bonds Ser '18A	550	Institutional Supp
SY769	928000	Budget & Planning	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	970000	Communications and Marketing	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	970000	Communications and Marketing	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	925000	Information Technology	200	Designated Operating-Managed	830040	Designated Op - Shared Svc	550	Institutional Supp
SY769	950000	Sys Facilities/VC Facilities	700	Net Investment in Plant - Proj	180000	Capital Project Fund	600	Operations and M
SY769	950000	Sys Facilities/VC Facilities	700	Net Investment in Plant - Proj	180000	Capital Project Fund	600	Operations and M
SY769	950000	Sys Facilities/VC Facilities	700	Net Investment in Plant - Proj	180000	Capital Project Fund	600	Operations and M
SY769	930000	Gen Counsel	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	930000	Gen Counsel	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	925000	Information Technology	200	Designated Operating-Managed	830040	Designated Op - Shared Svc	550	Institutional Supp
SY769	927100	Procurement	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	952000	Sys Fac Dev-Gen	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	600	Operations and M
SY769	970000	Communications and Marketing	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	970000	Communications and Marketing	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	927100	Procurement	105	Educational & General	805001	State Approp-BSA	550	Institutional Supp
SY769	927100	Procurement	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp
SY769	952000	Sys Fac Dev-Gen	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	600	Operations and M
SY769	952000	Sys Fac Dev-Gen	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	600	Operations and M
SY769	970000	Communications and Marketing	200	Designated Operating-Managed	830029	Designated Oper-Central Alloc	550	Institutional Supp