Generating Reports

To Generate A Report:
1. From the **Main Menu**

2. Click **Reports Menu** | Reports Menu |

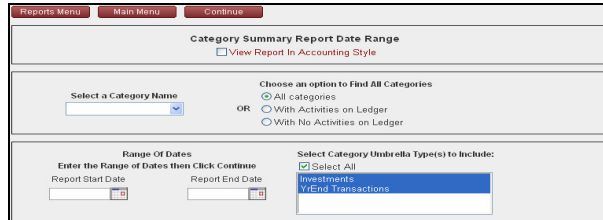*Reports 1-18 and the Board GL Reimbursement Reports are listed on this screen.*
Note: *To see a list of Various Transactions Reports:*
*Click **Report 11**. A new list of Transaction Reports will be displayed.*

To generate a report:
1. Select report to be printed

Most reports will display a menu such as the example below.

The options selected on this screen will determine the information in the report that has been selected

2. Determine the report options
   Select All:
   ➢ Select All Category Umbrella Types

   This report will include all Category Umbrella Types

   ➢ Select All Category Umbrella

   This report will include all Category Umbrellas

   Customize Selection:
   ➢ Select Category Umbrella Types
   1. De-select the **Select All** check box
      ☐ Select All Categories
   2. Click the **Category Umbrella Type** from the list
   3. To select more than one category Umbrella type:
      ▪ Click the first Category Umbrella Type
      ▪ Hold down Ctrl and continue to click the required umbrella types from the list (All selected types will be highlighted in blue)
   ➢ Select Category Umbrellas:
   1. De-select the **Select All** check box
      ☐ Select All Categories
   2. Click the **Category Umbrella** from the list
   3. To select more than one category Umbrella:
      ▪ Click the first Category Umbrella
      ▪ Hold down Ctrl and continue to click the required umbrella from the list (All selected umbrellas will be highlighted in blue)

3. Some reports include a date range option

   Select the required Start and End dates
4. Click **Continue** | Continue |
   The report preview will generate and display on the screen

To Customize Print Options:

Some reports will display print options at the top of the report screen. Click the option buttons as necessary
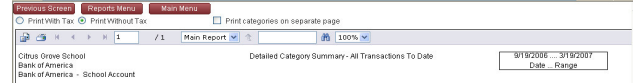
○ Print With Tax ◉ Print Without Tax   ☐ Print categories on separate page

To Print a report:

1. Click the **printer** [icon] icon
   The Adobe Print Preview window will open
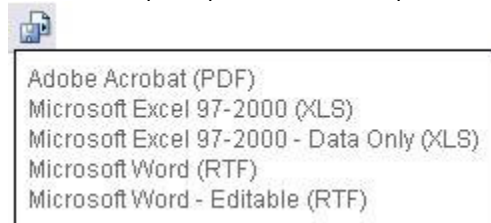   *The number of pages in the report will be indicated on the report toolbar.*

2. Click the **print** [icon] icon on the Adobe toolbar to complete the printing process.
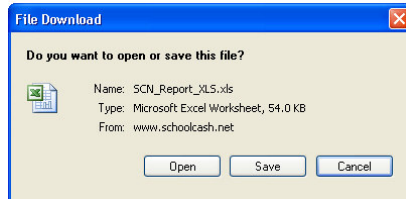
Advanced Features:

➢ To export the report:
   Note: *Reports can be exported to Adobe Acrobat, an Excel spreadsheet or a Word document.*

   1. Click the **Save** [icon] Icon in the preview screen
   2. Select the export option from the drop down

   3. In the dialog box select either **Open** the file without saving or **Save** to save the file on a hard drive
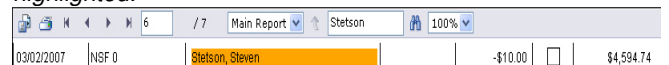

➢ To search for text in the report:
   1. Enter the search criteria in the search field

   2. Click the **binoculars** [icon] icon
   If the search criterion is located in the report, it will be highlighted.

   3. Click the binoculars to continue the search