


IFAS Reporting Tips

Selection Criteria


You may enter multiple values separated by commas. Example:
You may search for specific text in a field. Example:

Enter the Account Code or leave * for all:

Enter the Account Description or leave * for all:

- The  button next to a selection criteria question will provide a look-up list. Example:



Enter or select or enter the Account Code or leave * for all: 

Hold the Control (Ctrl) key on your keyboard to select multiple entries. Click Close when finished. It will be entered in your selection criteria

KEY	Title (Long)
00040	Classics
00060	English
00070	Mini Terms Abroad
00080	Edward E. Hale Jr.
00100	Modern Languages
00110	Terms Abroad Endowed
00120	Germany Program
00130	France Program
00140	Spain Program

- Be sure to not leave any fields blank as this will return no data.

Valid codes for Selection Criteria

- To determine the valid Account Codes, Budget Types, Departments, Divisions, Functions, and Funds available to you, it is recommended that you generate an Account Lookup Report using no criteria. This report will contain all the Accounts for which you have access along with the specific coding for each. An example of the Account Lookup Report is shown below. Complete listings of valid codes are available by selecting "IFAS Online Access" at <http://www.union.edu/finance>.


Account Lookup Report Example:


Entity	Resp Center	Division	Department	Fund	Account	Function
UC	Union College					
	VPEI	Vice Pres Finance & Admin				
			300		VP Finance & Administration	
				30001	VP Finance & Administration	
					10	CURRENT FUND-OPERATING E & G
				A	10820 Finance	0900 FINANCE

Navigating and Exporting/Printing Reports

- The top right corner of all reports contains the **page number**
- The **navigation** icons to move to a subsequent page are in the top left corner



- **Make sure reports are complete before exporting or printing** (see top right corner)
- **Best format for Printing or Saving:** Click on PDF icon, , and the report will open in Adobe Acrobat and you can save or print the report as a .pdf file.
- **Download to Excel:** Some reports have an option to download formatted data to Excel.

If so, you will see an icon in the upper left corner, . Click on this paperclip in the upper left corner and select "Excel Output" to view/save the data in Excel.

Attachments & Images ("Drilling")

- Manual attachments (e.g. PO quotes) are available
- Information that has been scanned (since February 2007):
 - Check Requests
 - PO and AP Invoices
- Information not being scanned:
 - Card Program Receipts
 - Reimbursements (Paper or Card Program)
 - Journal Entries
 - Cash Receipts
 - Bookstore Vendor Payments
 - Utility Bills (e.g. National Grid)
- Drilling
Place cursor over blue/red/green field:
 - Drill = drill to report
 - Camera = drill to attachments or scanned images (note: not all items are scanned)
 - Drill & Camera = drill to either report or images, use right-click on mouse to select