

Union College - IFAS Reporting Tips

IFAS Reporting Tips


Selection Criteria


- You may enter multiple values separated by commas.
Example:

Enter the Account Code or leave * for all:

- You may search for specific text in a field.
Example:

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



- 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					
	VPFI	Vice Pres Finance & Admin				
		300	VP Finance & Administration			
			30001	VP Finance & Administration		
				10	CURRENT FUND-OPERATING E & G	
				A	10820 Finance	0900 FINANCE

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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

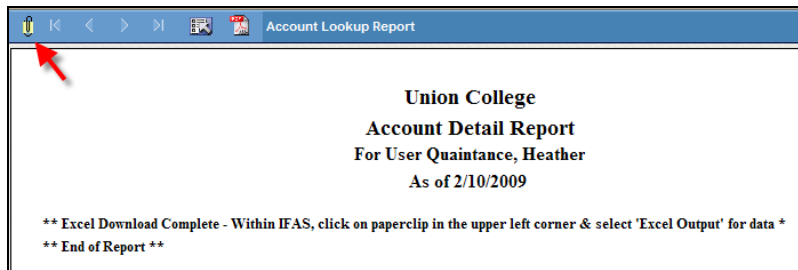


- **Make sure reports are complete before exporting or printing (see top right corner)**

- **Best format:** Click on PDF icon (save or print)
- Other Click on Options Icon – Print or Export (to Excel or PDF)

Note: Excel output is unformatted.

- **Download to Excel:** Some reports have an option to download formatted data to Excel. If so, you will see an option to “Export to Excel (Y/N)?” in the selection criteria. Select “Y” and Submit. Click on the 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