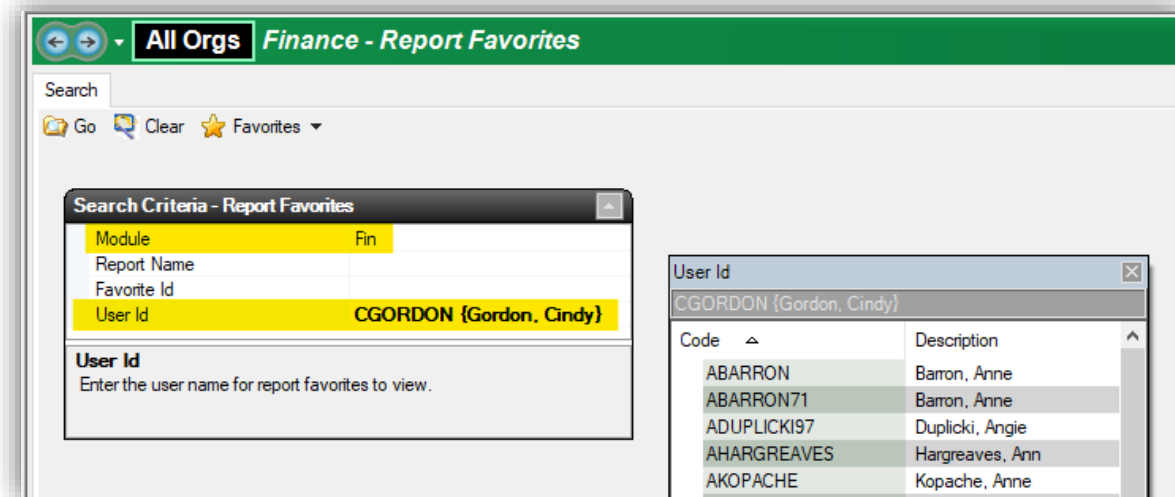


COPYING A PUBLIC REPORT FAVORITE

We have the ability to share reports within our county when Report Favorites are marked as Public. The Public Report uses the report filters only, not the data. This is a great way to get reports that your SCOE Fiscal Advisors and other users have created.

Go to Finance – Report Favorites

- **Module:** Fin or HR
- **User Id:** Select from the menu
- Click **Go** to get a list of Public Reports



- From the list – Open the Report Favorite to copy
- Highlight and double click to Open

The screenshot shows the 'Report Favorites' application in grid view. The table displays the following data:

Favorite Id	Report Name	Report Description	Favorite Description	User
Fiscal 04 AB 21/22	Fiscal04	Comparative Account Summar		CGORDON
Fiscal 04 Adopted	Fiscal04	Comparative Account Summar		CGORDON
Fiscal 04 detail	Fiscal04	Comparative Account Summar		CGORDON
Fiscal 04 Interim	Fiscal04	Comparative Account Summar		CGORDON
Compare 2 yr actual	Fiscal06	Comparative Object Summary		CGORDON
Fiscal 06 Interim	Fiscal06	Comparative Object Summary		CGORDON

- Run report with current filters, then verify/update filters with District data

Example Fiscal04 Comparative Account Summary by Object: Interim

Request

1 - Report

Report Number: Fiscal04
 Description: Comparative Account Summary by Object
 Report Sample: Fiscal04
 Report Favorite ID:

2 - Account Selection

Org:
 Online Status: Online
 Ending Date:
 Restricted?: Yes - Include Restricted Accounts
 Fund: **01 {General Fund}**
 Resource:
 Year:
 Goal:
 Function:
 Object:
 School:
 Management:

3 - Account Sort/Group Options

Sort/Group 1: **Resource**
 Sort/Group 2:
 Sort/Group 3:
 Sort/Group 4:
 Obj Digits: **1 {Subtotal when the first digit of the object changes}**
 Visual: Show detail black and object total bold without Line
 Page Break Lvl: {No Forced Page Breaks}

4-Columns{Source/Formula;Dec/Proj;FY;Col Hdg 1;Col Hdg 2}

Column 1: **A::2019**
 Column 2: **A::2020**
 Column 3: **A::2021**
 Column 4: **OB::: Adopted;Budget:::2022**
 Column 5: **RB:::2022**
 Column 6: **AE:::2022**

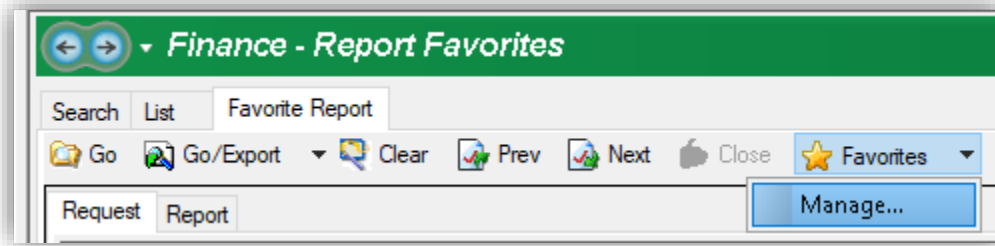
Update Account and Sort as needed

Column 1

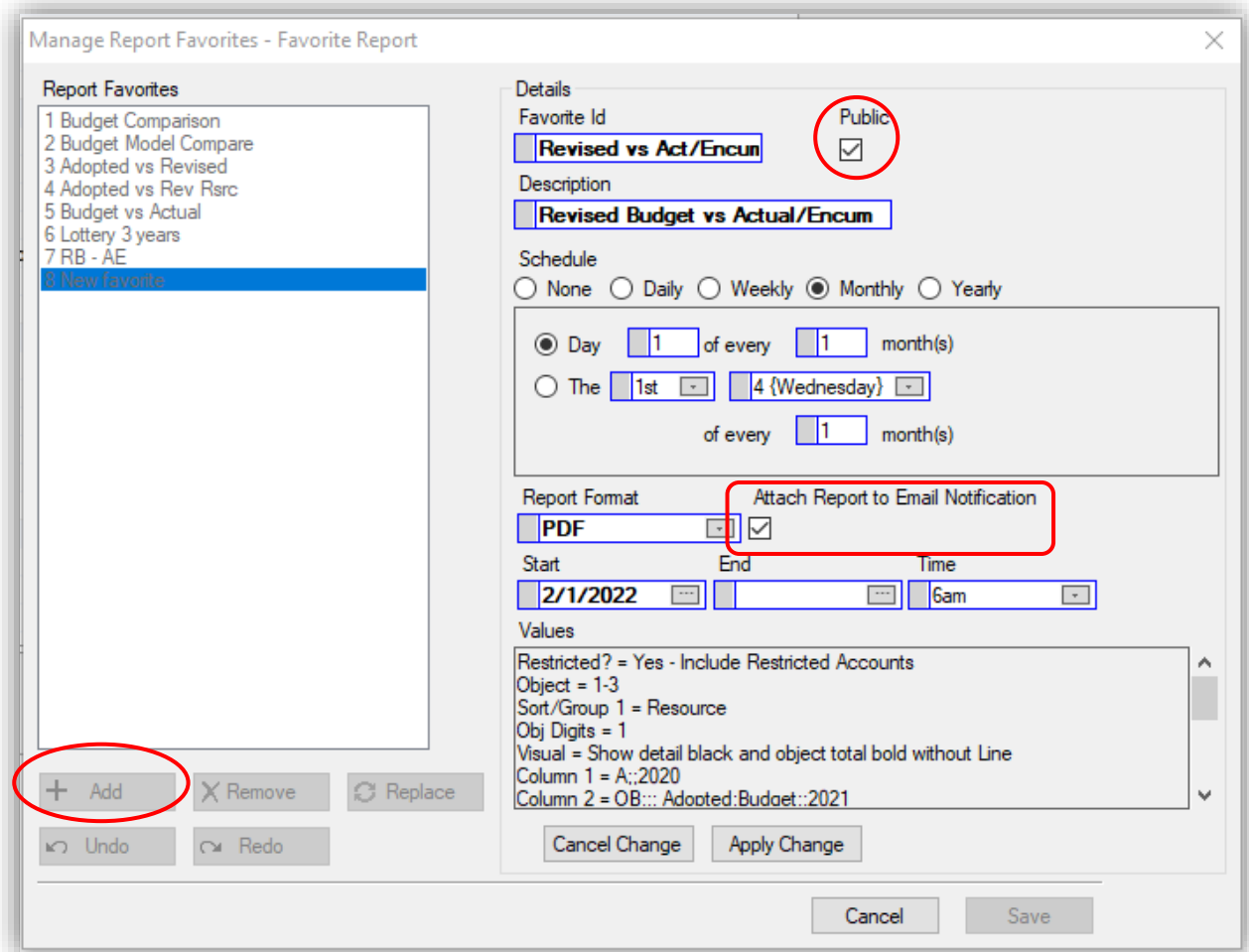
A::2019

Sample Column Spec	Description
:::Underscore;Column	Column has underscore for user to fill in
A	Actuals (decimals/year/description all default)
AB	Account Balance with defaults
AE	Actuals + Encumbrances with defaults
AV	Actuals and Activity
C3*1.05;D2%	Column 3 multiplied by 1.05/2 decimals shown as %
C3*C4	Columns 3 and 4 are multiplied together
C3/C4	Column 3 divided by column 4
C3-C4;D2	Add Columns 3 and 4/two decimal places
C4-C3	Column 4 minus Column 3
E	Encumbrances
EV	Actuals + Encumbrances and Activity
OB::: Adopted;Budget	Org Budget/no pennies(Base Proj)/current FY/specified c...
OB16-01;P2;2016	Budget Model/no pennies(Second Yr Proj)/FY 2016
RB:::2015	Revised Budget/default decimals(Base Proj)/FY 2015
V	Activity for Starting and Ending Balance Accounts (CR - DR)

- Save as your own Report Favorite – Click on Favorites then Manage



- Click on **+Add**



- **Favorite Id:** Enter Custom Name
- **Public:** Check to share in Report Favorites
- **Description:** Enter Custom Name; Allows more characters than Id
- **Schedule:** None, Daily, Weekly, Monthly, Yearly
- **Day:** Choose options
- **Report Format:** Select format
- **Attach Report to Email Notification:** Click to attach report to email
 - **Note:** Reports with Social Security Number will not be attached, will receive notification that report is ready in My Report Activity
- **Start:** Enter date to start schedule
- **Apply Change**
- **Save**
- Report is now your Favorite!