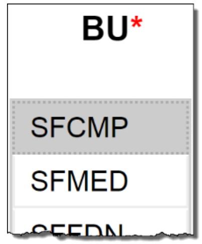
Filtering and Running Reports

Each report in **MyReports** has a unique filter page; most reports have very similar filter pages to help you more easily locate and enter your report criteria. There are usually four major sections on a typical filter page: Report Date Filters, Chartstring Filters, Report Specific Filters, and Report Output Selection.

Mandatory and Conditional Filters

The red asterisk (*) denotes a required field which ***must be entered*** prior to running the report:

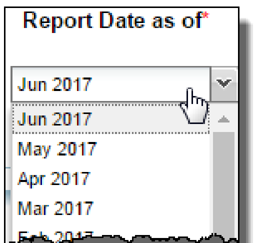


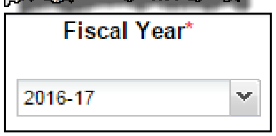
The orange triangle (▲) denotes a conditionally required field, which means ***at least one of these fields*** must be populated prior to running the report.

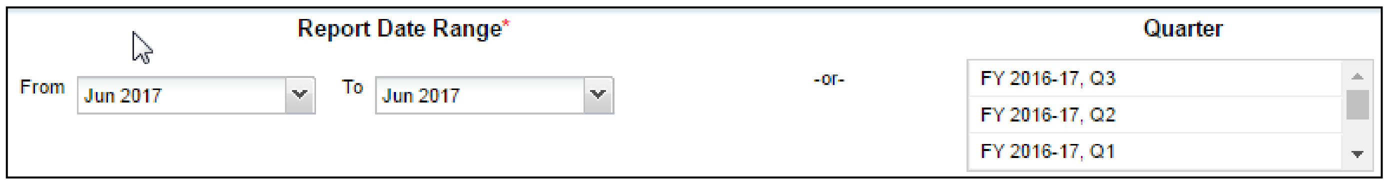
All other **MyReports** filters are optional.

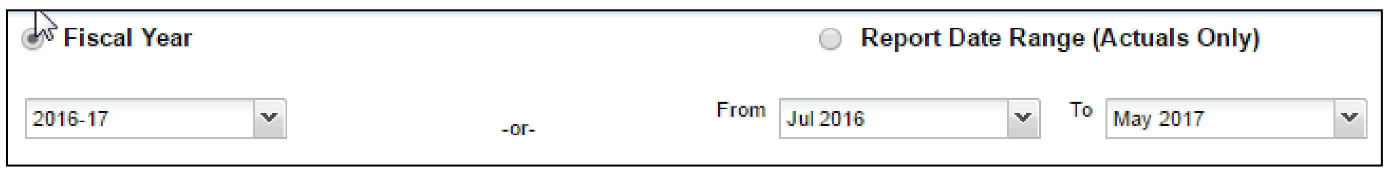
Report Date Filters

There are a variety of date filters you may see depending on the report you choose. The date filters are designed to make the most sense for the data being returned by the report. Here are some examples of various **Report Date Filters**:







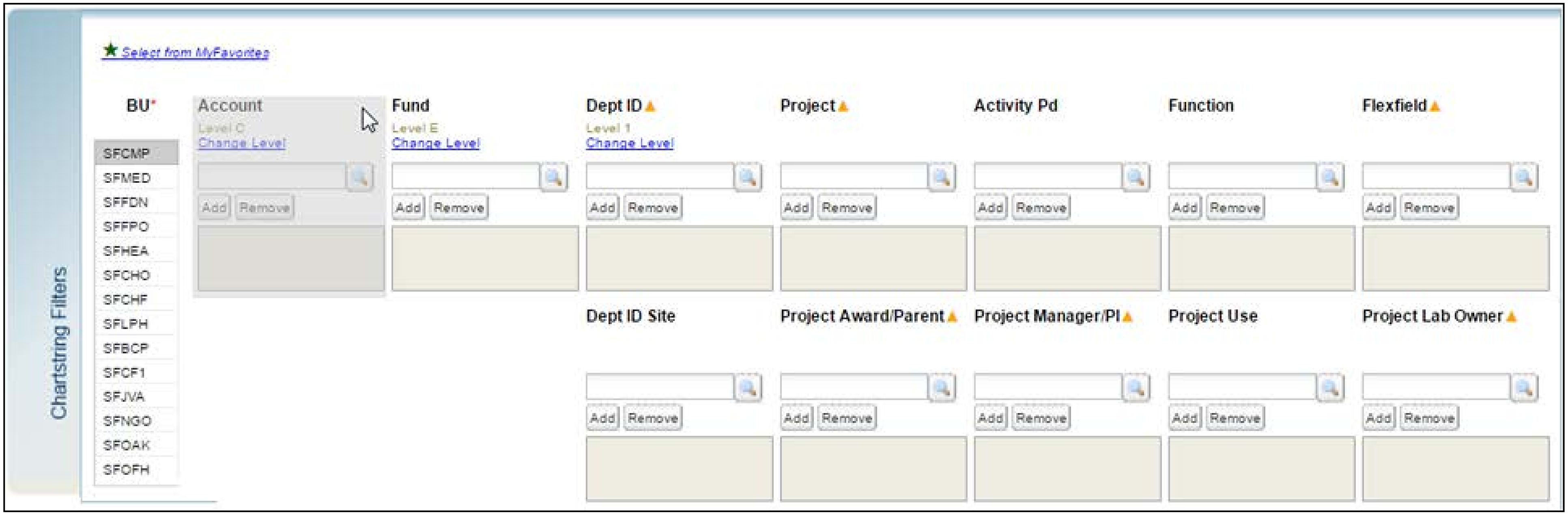


- Most date filters are drop-down menus
  - For single-entry filters such as **Report Date as of** or **Fiscal Year**, click the ▾ icon and select the desired entry
  - For **Report Date Range** filters, use the ▾ icons to choose **From** and **To** dates to set the timespan. When available, you can also use the **Quarter** selection list to choose the desired quarter(s), which will automatically update the **From** and **To** dates.
- Some reports are designed to run as of a specific date such as the last closed month or the current date. In these cases, the Report Date Filters are greyed out and unavailable.
- Date filters are designed to be intuitive but you can find more specific information in the Job Aid for each report on the **MyReports** section of the [Controller's Office website]()

Filtering and Running Reports

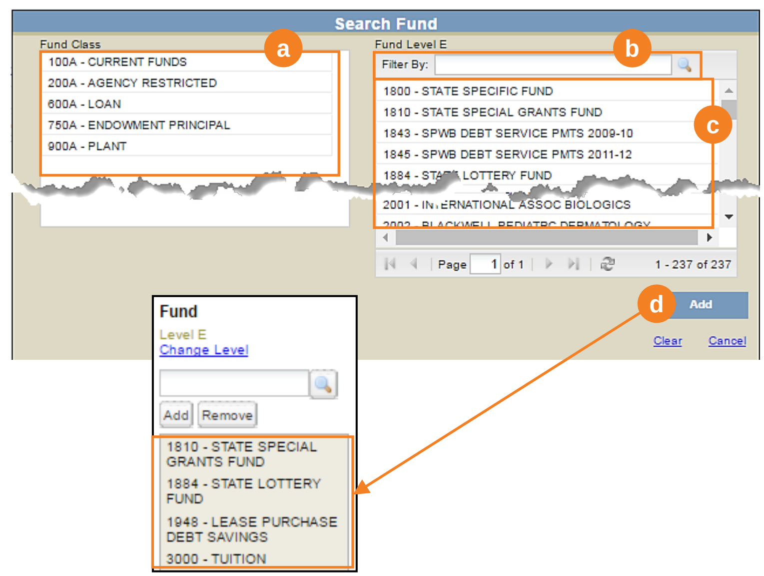
Chartstring Filters

While the **BU**, or **Business Unit** is often required, you can optionally filter on the other **PeopleSoft** Chartfields as well as commonly used attributes in the **Chartstring Filters** section:



There are two options to enter Chartfield filters in **MyReports**; repeat these steps as necessary to add values until all desired filters are complete:

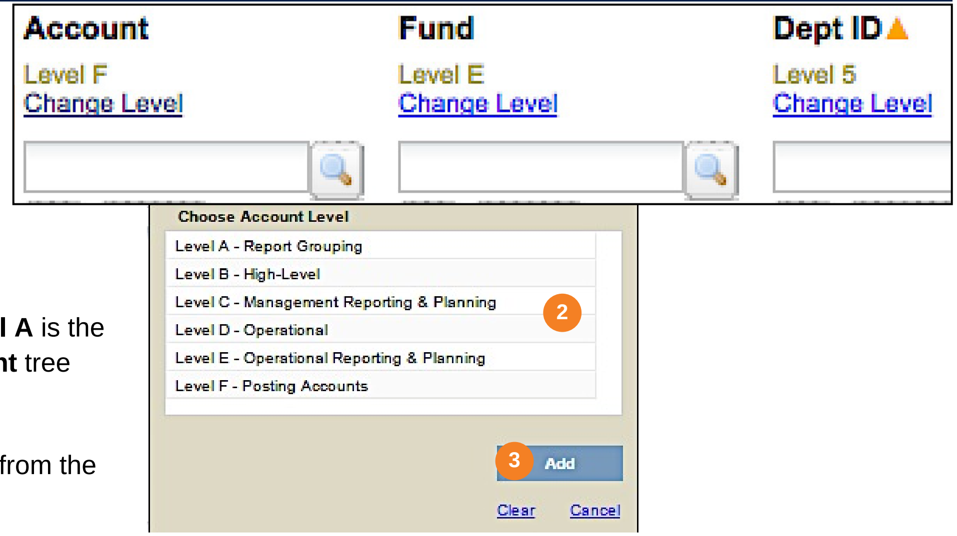
1. **Direct Entry:** Type the desired filter criteria into the selected field; **MyReports** displays potential entries as you type. Choose the correct entry and then the **Add** button to move the chosen filter into the filter box.
2. **Search:** If you do not know the value, you can search by clicking the spyglass icon ( ); a popup box displays
   - a. To further limit your choices, choose the group or category from the left box
   - b. You may also optionally filter within each group typing a search string in the **Filter By** field and then clicking the spyglass ( )
   - c. Choose the desired entries from the right window. Hold down Control (PC) or Command (Mac) to select multiple values
   - d. Click **Add** to move the selection(s) to the filter box



Filtering and Running Reports

Chartstring Filters and Trees

Values for **Account**, **Fund**, and **Dept ID** are organized in trees. The default level used by the report is displayed beneath the Chartfield name on the filter page. In this example, notice the default level for **Account** is **Level F**, for **Fund** is **Level E**, and for **Dept ID** is **Level 5**. Default levels may differ based on the type of data the report is designed to return.



To change the level for a Chartfield:

1. Click the **Change Level** link for the desired Chartfield
2. Click to choose the desired level from the popup menu. In this example, **Level A** is the highest level, and **Level F** is the posting, or most granular level of the **Account** tree
3. Click **Add**

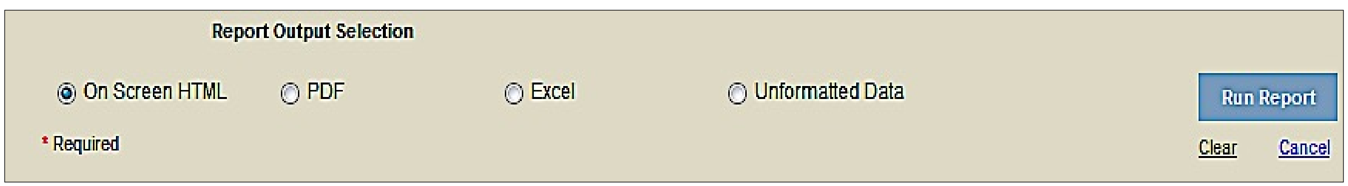
Use the direct entry and/or search method to populate the Chartfield(s) using data from the newly chosen level

Report Specific Filters

- Most reports have a filter page section called **Report Specific Filters** which allows you to further limit your report to return only the information you need
- Each report's specific filters and their use are detailed in the individual report job aids located on the **MyReports** section of the Controller's Office website

Report Output Selection & Running Your Report

Depending on the report, a number of output types are available:



- **On Screen HTML** (default) – runs the report to the on-screen application in a new window/tab where additional interactive features are often available
- **PDF** – downloads the report directly as an Adobe® Acrobat® **PDF** file without the ability for further user interaction
- **Excel** – downloads the report directly as a formatted Microsoft® **Excel** file
- **Unformatted Data** (not available for all reports) – downloads the report directly as an **Excel** file that has no special formatting and a single row for column headings, making it the best source for pivot tables and other advanced spreadsheet analysis
- Click the **Clear** link in the bottom right-hand corner of the **Report Output Selection** to clear all your entered filters
- Click the **Cancel** link to close the filter page and return to the report tab landing page

To run the report, select your desired report output then click the **Run Report** button

Filtering and Running Reports

Helpful Hints & Additional Features

- In many reports, you can sort in ascending or descending order on a column by clicking the ▲ and ▼ icons
- For the easiest navigation when using **MyReports**, close extra browser tabs/windows (usually the result of drilling through to another report) when you have completed reviewing and/or exporting the information – the filter page remains open in another tab or window until closed
- See the **Working in the Report View** section of a report's individual job aid for details on using the interactive on-screen HTML features of each report
- The **MyFavorites** functionality allows you to save and retrieve frequently used filter criteria. See the Managing and Scheduling MyFavorites in MyReports job aid for instructions on saving report parameters to **MyFavorites**, and how to select and run a saved Favorite

Additional Information & Assistance

- More information about **MyReports** including how to request access and additional training can be found in the MyReports section of the Controller's Office website
- If you require help with a technical problem, or have a question about a specific report, contact the Controller's Office Solution Center at COSolutionCenter@ucsf.edu or 415.476.2126
- To stay informed about **MyReports** news, follow the directions on the MyReports section of the Controller's Office website to join the MyReports ListServ