


# Summary/Miscellaneous Reports

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# Summary/Miscellaneous Reports

***Finance > Reports > Finance Reports > Summary/Miscellaneous Reports***

This page allows you to select the report you want to generate.

## Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

❑ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

❑ Type or select the report options. **Parameters in bold are required.**

❑ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

Review, save and/or print the report.

### Sort and filter:

Some reports may or may not provide the sort and/or filter option.

<table>
<tr><td>Sort</td><td>Sort report data:<br>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.<br>From the report window, click Sort/Filter to open the Sort/Filter window. By default, the Sort Criteria section is expanded. If not, click Sort Criteria.
<table>
<tr><td>(Left grid) Columns Available for Sorting</td><td>Select the columns by which you want to sort, the columns are highlighted blue. Click ▸ to move the selected columns to the right side of under Sort Columns. Continue moving columns to the right grid as needed.</td></tr>
<tr><td>(Right grid) Sort Columns</td><td>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.<br>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.<br>To remove a column from the sort, select the column, and then click to move it back to the left grid.</td></tr>
</table>
Click OK to apply the selected sort criteria to the report.<br>Click Cancel to close the window without re-sorting.</td></tr>
</table>

**Filter**

Filter report data:

When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.

From the report window, click **Sort/Filter** to open the **Sort/Filter** window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.

If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available.

Click **Add Criterion** to add new filter criteria. A blank row is displayed in the grid.

| Field | Description |
|---|---|
| **Column** | Select a column by which to filter the data. The drop down lists the columns that appear on the report. |
| **Operator** | Select an operator.<br>= Equals<br>≠ Not equals<br>‹ Less than<br>≤ Less than or equal to<br>› Greater than<br>≥ Greater than or equal to |
| **Value** | Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date. |

**Other functions and features:**

| | |
|---|---|
| **Add Criterion** | Add another row.<br>Select the logical connector (*AND* or *OR*) in the **Logical** field. Continue adding rows as needed.<br>Using the *AND* operator limits search results, because the program looks only for records that contain both criterion. Using the *OR* operator expands search results, because the program looks for records that contain either one criterion or the other, or both. |
| **Delete Selected** | Delete selected row.<br>Select the row, and then click the **Delete Selected** button. The row is deleted from the filter criteria. |

**Click OK to apply the selected filter criteria to the report.**

**Click Cancel to close the dialog box without applying a filter.**

| | |
|---|---|
| **Reset** | Reset report data.<br>Click to restore the report to the original view, removing all sorting and filtering that has been applied. |

**Reset**

Reset report data:

Click to restore the report to the original view, removing all sorting and filtering that has been applied.