

Board Reports

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Budget > Reports > Board Reports

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

Select a report:

1. Click a report to select it. The parameter page for the selected report is displayed.
2. Type or select the report options. **Parameters in bold are required.**
3. Click **Run Preview** to generate the selected report. Review, save and/or print the report.

   Review the report using the following buttons:

   Click First to go to the first page of the report.
   Click ◀ to go back one page.
   Click ▶ to go forward one page.
   Click Last to go to the last page of the report.

   The report can be viewed and saved in various file formats.

   Click  to save and print the report in PDF format.
   Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.
   Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Other functions and features:

Clear Options	Clear all data from the parameter fields.
Return to Reports	Clear all data from the parameter fields.

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:
You can sort data to make it easier to review or find records in the reports. 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. 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.
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.
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.
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. = Equals ≠ Not equals ‹ Less than ≤ Less than or equal to › Greater than ≥ 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. Select the logical connector (*AND* or *OR*) in the **Logical** field. Continue adding rows as needed. 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. 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. 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.


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