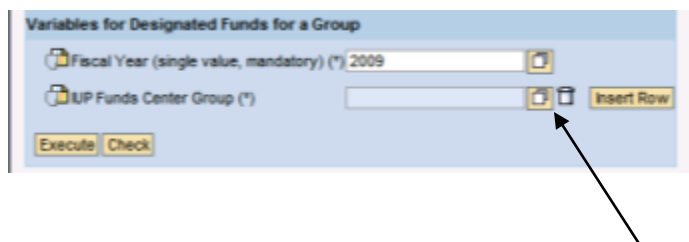


Selecting a Funds Center Group

Financial reporting at IUP is organized by Funds Center Groups. A Funds Center Group is simply an organizational unit. The group will contain funds centers and/or other funds center groups (i.e. lower level groups).

For example, all of IUP is group 40. Under group 40 is each executive area. Under an executive area is each college or major unit, and then each department under the major unit. Finally, each funds center within the department.

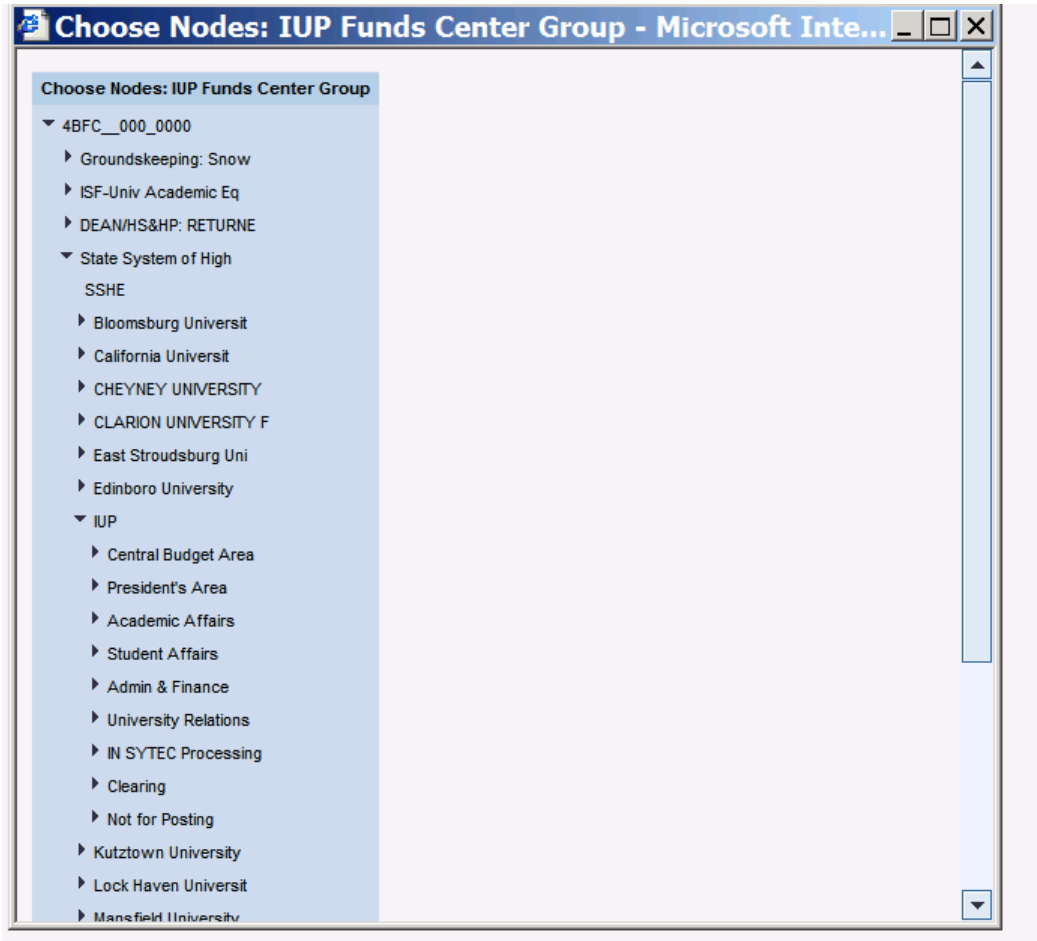
Many queries have Funds Center Group as a selection variable, similar to the screen shown below:



The screenshot shows a window titled "Variables for Designated Funds for a Group". It contains two input fields: "Fiscal Year (single value, mandatory) (*)" with the value "2009" and "IUP Funds Center Group (*)". The "IUP Funds Center Group (*)" field has a selection icon (a small square with a magnifying glass) to its right. An arrow points from the text below to this icon. There is also an "Insert Row" button to the right of the "IUP Funds Center Group" field. At the bottom left, there are "Execute" and "Check" buttons.

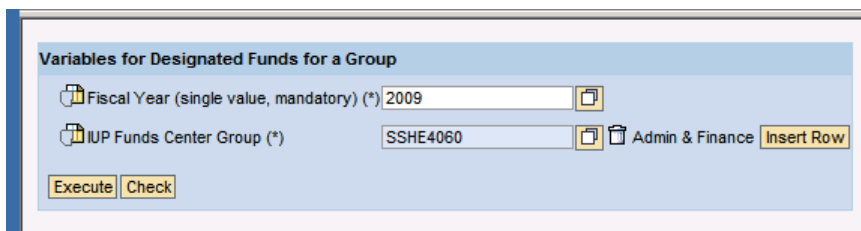
To select the appropriate group **click the select icon next to the group field.**

In the next screen you will navigate to the desired group. Notice that you will need to open several groups. **Click on the arrow heads to open a group.** To get to IUP you will need to open 4BFC__000_0000, and then SSHE. Once you open IUP you will see the executive areas. You may continue to open up levels to find the group you want. For purposes of this demonstration, the Administration and Finance group will be selected.



You may continue to open up levels to find the group you want. For purposes of this demonstration, the Administration and Finance group will be selected. **To select a group click on the group name.**

After the group is selected the variable screen will return with the selected group displayed. For our example, the group 4060 will return all funds centers and sub groups within the Administration and Finance Division; therefore, there is no need to select each group or funds center in the unit.

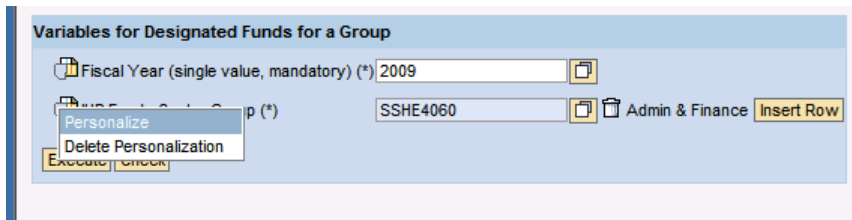


You can add other groups to the query by using the insert row button; however, this is rarely necessary.

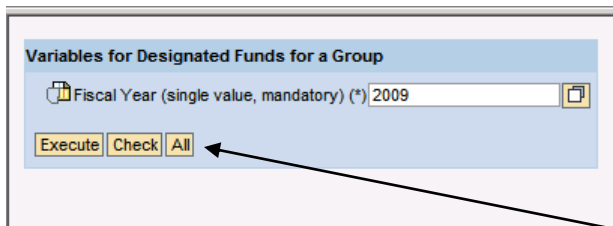
Personalization

At this point you will want to consider if you want to personalize the selection. If you are going to use this report with the same selection all of the time, you should personalize the selection. If you need several versions (i.e. different selections) of the report, then you should use bookmarks (explained later).

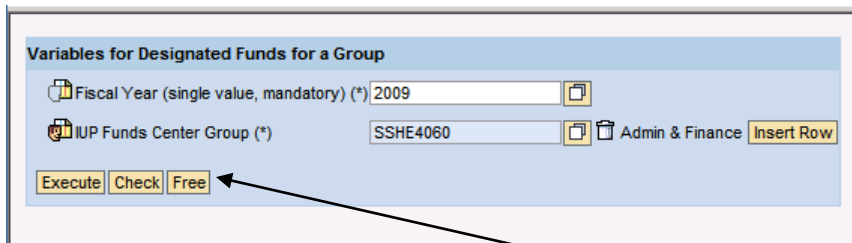
To personalize a selection **right click on the icon to the left of the Funds Center Group and choose Personalize**, as shown below:



Notice that the Funds Center Group field has disappeared.



If needed, you can make the field reappear by clicking the All button.



If you want to hide the personalized field again, you can click the Free button.

Click on Execute to run the report. Now every time you run this report the Funds Center Group will automatically selected the personalized value.


Bookmarking

You can create a web address for a report and save it in your favorites. This is referred to as bookmarking the report. Unlike personalization, the bookmark can be used by anyone. You can create the bookmark and give the link (URL address) to anyone you choose. The downside of a bookmark is that all the variables are saved. In the example we have been using, you will need to create a new bookmark each time the fiscal year changes, because the fiscal year at the time the bookmark is created is saved along within the bookmark.

After the report is executed you can **create a bookmark by clicking the bookmark icon right above the report area.**




Designated Funds Report for: SSHE4060; Admin & Finance
Fiscal Year: 2009

Choose a Display:

[All *](#) [Balances *](#) [Group View *](#) [Reserves *](#) [Unfunded Deficits *](#) [User ID *](#) 

Commitment item

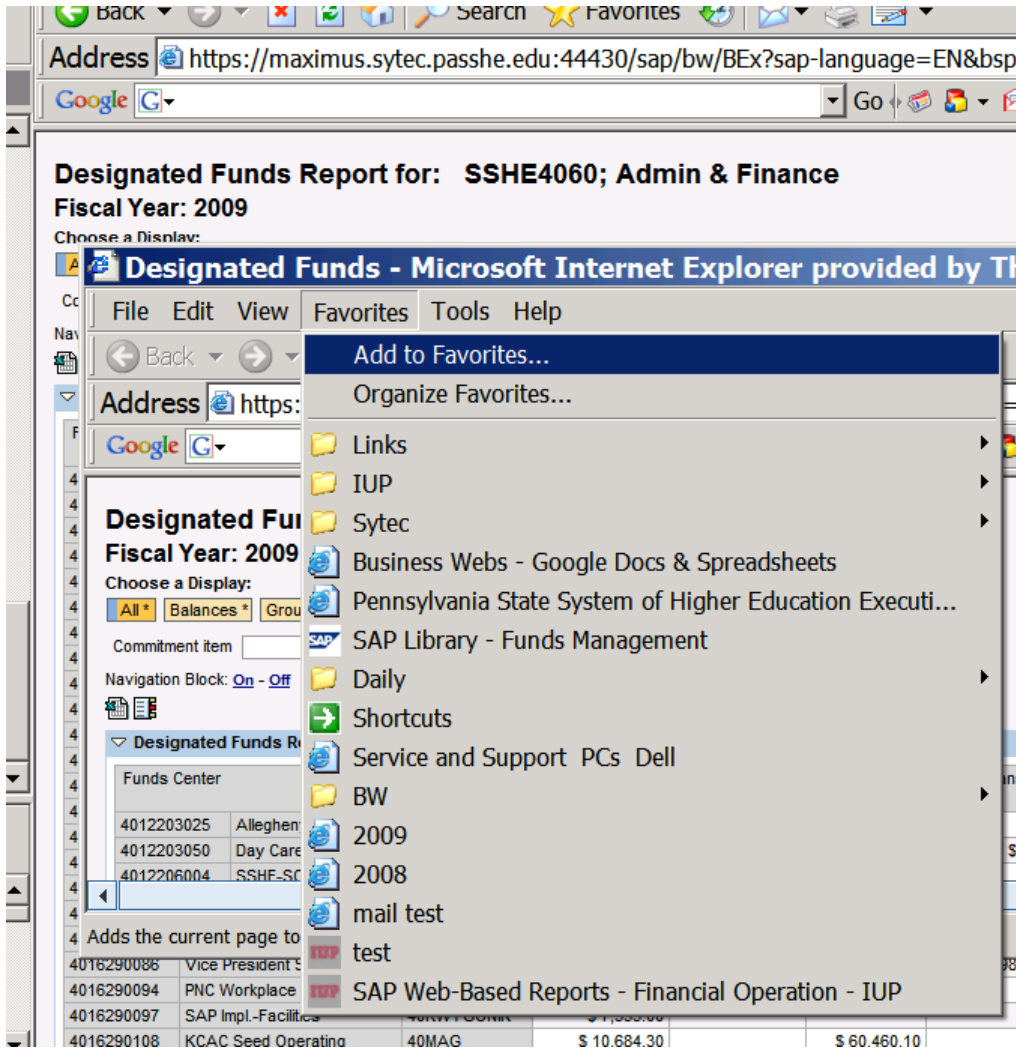
Navigation Block: [On](#) - [Off](#)

Designated Funds Report

Funds Center	User Name	Beginning Balance	Revenues	Expenses
4012203025	Allegheny Arboretum	40SCSINK	\$ 3,115.08	\$ 1

The report will generate in a separate web window. Use the **Add to Favorites** option to add the bookmark to your browser, as shown below:



You could also copy the URL in the address field and put it in other applications.

End of Document.