



In search bar,   search Enter a portion (or all) of the report name


Pre-loaded for the most used Reports:

- Company: Grossmont-Cuyamaca Community College District
- Plan Structure: WB – Working Budget
- Time Period: Current Year
 - o To run the report for just one month, select Current Period and the desired month under Period.
- Period: 2016-2017 JUN


Choose criteria as needed, examples include:

- SmartKey (1113501)
- Business Unit: (3 Grossmont or 4 Cuyamaca)
- Fund: (11 Unrestricted General Fund or 12 Restricted General Fund)
- Zip: (12471)
- Revenue Category, Salary Object or Spend Category
- Click  to run the report


Review report – Drill on blue outline

- For more details, you can click on anything shown in blue.
 - o  Next to a number to get subtotals using predetermined criteria
 - o A number to see the transactions
 - o Ledger account title (shows structure)

Export report to PDF

- Select printer icon  on upper right hand corner. This will open the report as a PDF. You can then save or print the report. To exit the pdf, click on the X on the top right of the folder.

To view more detail, export to Excel

- Click on Excel icon  on upper right hand corner. Some reports may take a while. This will convert and open as an Excel document on your computer screen.
 - o One item to note; some reports can be expanded to see additional information, so check the area to the left of column A.