



## Report Use Fact Sheet

Based on agency business process needs, reports can be utilized to provide information on: user roles; descriptions; navigation; layouts; ledgers; frequency of use; run time and processing hints.

Reports are accessible and viewable in various file format outputs. The following processes explain the steps involved for: accessing, opening, displaying, saving and formatting reports.

### ➤ **Accessing a Report:**

- Determine the report needed from the [SFS Reports User Guide](#)
- Follow navigation listed in the Reports User Guide.
- Input the applicable information to run the report (e.g., Draw Dates, Grant Business Units).
- Select the run option.

### ➤ **Opening and Displaying a Report:**

- Select the format to display (options may include: HTM, PDF, RTF or XLS).  
**Note:** there may be only one or more formats available for display based on the type of report.
- Access the Process Monitor link and use the refresh button to ensure the report ran as successful and shows as posted.  
**Note:** the refresh button may have to be selected several times, before the report shows as successful and posted.
- Access the Report Manager link to open the report in the selected format for viewing. A window message prompt may offer the option to Open, Save or Save As. **Note:** if “saving” or using “save as” when opening a file, ensure that file naming convention meets the need of the user and is saved to the appropriate location (e.g., desktop, personal drive, agency drive, etc.).

### ➤ **Tips for viewing Report Results in Excel\* or XLS Format:**

- If a field within the Excel (.xls or .xlsx) report displays a symbol (e.g. #), double click the border edge of the column or drag the column over to display the data.
- To filter the data in Excel:
  - Highlight the header row of the Excel spreadsheet
  - Select the “Sort & Filter” option in the type right corner and choose filter.
- To sort the data in Excel:
  - Highlight the header row of the Excel spreadsheet
  - Select the “Sort & Filter” option in the type right corner and choose the desired Sort option (e.g., Sort A to Z, Sort Z to A, Custom Sort)
- To remove duplicate data values:
  - Select the “Data” tab, and the “Remove Duplicates” option.
  - You will then be promoted to select one or more coluns that contain duplicates, and designate whether your data has headers.



**\*All SFS users should have a basic to intermediate understanding of how to use Excel to filter, sort, conduct further calculation, and/or analyze, in order to obtain information for specific agency business process or reporting needs.**

For information on Excel training opportunities, refer to the Statewide Learning Management System (SLMS), and enter Excel in the Learning Search box. Agencies with access to Empire KnowledgeBank (EKB) license can also refer to the EKB course catalog on the SLMS homepage for additional Excel training opportunities available in the SLMS.