



## Budget Formulation and Management (BFM)

### End User Guide – Form 8 Budget Revisions



State of Alabama

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## Budget Form Instructions

### 1. Budget Revisions – Form 8 (7000)

#### 1.1. Form 8 Revisions Entry

1.1.1. After logging into BFM, begin by hovering over 'Budget Revisions on the header menu, and then select 'Form 8 (7000) Revision'.



Form 8 - (7000) Plan Revision

1.1.2. On the 'List Page', you will see the Form 8s to which you have access based on your security.

Form 8 - (7000) Plan Revision

ID	Revision #	Stage Code	Stage Name	Short Name	Department	Rows	Attach Count	Last Update	Last User	Workflow	Actions
10332	002-FY25-OP REV-1	7001	Initial	Transfer	002	3	1	9/16/2024	End User Report	Submit	Header Detail
10338	002-FY25-OP REV-2	7003	Dept Level 2 Approver	Transfer	002	3	1	9/16/2024	bryan.reed@she	Submit	Header Detail
10341	002-FY25-OP REV-4	7001	Initial		002	4	0	9/17/2024	Lindsay Schwerr	Submit	Header Detail

1.1.3. If you are editing an existing form, click on 'Header' on the row of the form you would like to edit. To create a new revision, click 'Add New' in the gray header bar.

The screenshot shows the SHERPA navigation bar with the following items: Home, Operations Plans, Budget Request, Budget Revisions (highlighted), and QPR Performance. A dropdown menu is open under 'Budget Revisions', showing 'Add New' as the selected option.

Form 8 - (7000) Plan Revision

ID	Revision #	Stage Code	Stage Name	Short Name	Department	Rows	Attach Count	Last Update
10332	002-FY25-OP REV-1	7001	Initial	Transfer	002	3	1	9/16/2024
10338	002-FY25-OP REV-2	7003	Dept Level 2 Approver	Transfer	002	3	1	9/16/2024
10341	002-FY25-OP REV-4	7001	Initial		002	4	0	9/17/2024

1.1.4. In the resulting window, use the Stage dropdown to select the appropriate Stage (likely '7001 – Initial'), and use the magnifying glass to search for and select your department. Then click 'Save'.

The screenshot shows a window titled 'Create a new Budget Form - 7000' with a 'Close' button. The form contains the following fields:

- Stage:\* 7001 - Initial (dropdown menu)
- Department: 002 (text input with search icon and close icon)
- Alcoholic Beverage Control Bd (text below department)
- Save (button)
- Cancel (button)

1.1.5. On the resulting form header, the Revision # is automatically generated. Please enter the Objective and Name (optional).

### Budget Form Header

Form 8 - (7000) Plan Revision was successfully updated.

🔍 Mention History   🔍 Mention   ➡ Submit   ✕ Close

Instance ID	Form Definition	Definition Name	Revision #	Department
10350	7000	Form 8 - (7000) Plan Revision	002-FY25-OP REV-6	002

**Stage Code:\***       **Department:**   
Initial      Alcoholic Beverage Control Bd

**Header**   Expenditures   Attachments   Submit History   System

**Revision #:**      

**Name:**

**Objective:**

1.1.6. Next click on the 'Expenditures' tab.

1.1.7. The Expenditures tab will not have any prepopulated rows. Click 'Add New' to add your first revision row.

### Expenditures

Form Header Org

**002**

Alcoholic Beverage Control Bd

Q1 Total

**0**

FY 2025 First Quarter

Q2 Total

**0**

FY 2025 Second Quarter

🔍 X Close   **+ Add New**   🔍 Copy   ↓ Export   ↑ Import   ↻ Refresh

Row	Audit Trail	Approp Class	Fund	Subfund	Function	Approp Unit	Budget Object

1.1.8. Use the magnifying glass to search for and select the appropriate chart of accounts fields (Fund, Function, Appropriation Class, Budget Object, and Appropriation Unit), and enter a Justification (optional) and amounts for each quarter as applicable.

### Budget Form Entry - Add New Line

X Close

Form ID	Form Definition
10350	7000

**Fund**

 X

**Function**

 X

**Approp Class**

 X

**Budget Object**

 X

State General Fund      Market and Promoti      Agricultural Promot      Travel-In State

**Approp Unit**

 X

**Subfund**

 X

Default      Not Used      Not Used

**Appropriation Categories**

 X

Not Used

FY 2025 First Quarter:

FY 2025 Second Quarter:

FY 2025 Third Quarter:

FY 2025 Fourth Quarter:

1.1.9. There is also an Appropriation Categories (red box) field that can be used to select the appropriation category name for the 101 report (list below). The appropriation category field defaults to 0 (Not Used) and is optional to populate at this row level.

### Lookup

Quick Search:

Select	Code	Name
<input type="button" value="Select"/>	0	Not Used
<input type="button" value="Select"/>	1	Supplemental appropriation from State General Fund Act No.
<input type="button" value="Select"/>	10	Program Change
<input type="button" value="Select"/>	2	Supplemental appropriation from ETF Act No.
<input type="button" value="Select"/>	3	Departmental Receipts
<input type="button" value="Select"/>	4	Federal Receipts
<input type="button" value="Select"/>	5	Special Act No.
<input type="button" value="Select"/>	6	Transfer
<input type="button" value="Select"/>	7	Proration
<input type="button" value="Select"/>	8	Other
<input type="button" value="Select"/>	9	Reversion Reappropriation

Records: 1 - 11 of 11 - Pages:

1.1.10. Once the row has been added, additional rows can be added using 'Add New' or 'Copy'.

1.1.11. To Copy, highlight the row to be copied and click 'Copy' in the header bar. Update the chart of accounts as needed in the resulting window and enter a Justification and amounts for each quarter (as applicable).

Row	Audit Trail	Approp Class	Fund	Subfund	Function	Approp Unit	Budget Object	Budget Object Name	Appr	Appropriation Category
1		671	0100	0	0	0000	0600	Rentals and Leases	10	Program Change
2		671	0100	0	0	0000	0700	Utilities and	10	Program Change

1.1.12. Please also use Copy or Add New to include a Source of Funds row in each budget revision form. For the Source of Funds row, select 9999 for Budget Object, and search for and select a Subfund. Leave the Quarter values as 0s for revisions that are moving funds between object codes. Text will need to be entered in the Justification field for 0 dollar rows to save.

Budget Form Entry - Add New Line

X Close

Form ID	Form Definition
10338	7000

Fund: 0303 (Seafoods Fund)    Function: 0004 (Agricultural Promot)    Approp Class: 041 (Regulatory Services)    Budget Object: 9999 (Source of Funds)

Approp Unit: 0005 (Forestry)

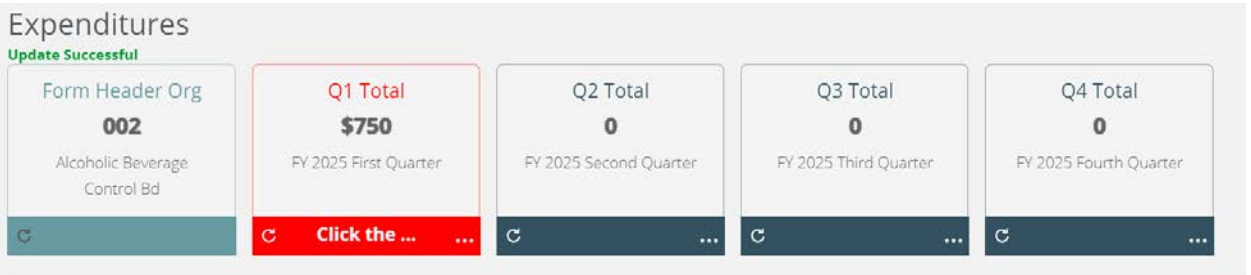
Appropriation Categories: 6 (Transfer)    Subfund: 0303-202 (Marine Resources L)

Justification: source of funds

FY 2025 First Quarter: 0  
 FY 2025 Second Quarter: 0  
 FY 2025 Third Quarter: 0  
 FY 2025 Fourth Quarter: 0

## 1.2. Form 8 Revisions (7000) Widgets

The Form 8 Revisions utilizes Widgets to help users balance their budget requests.



1.2.1. For each form, there are five tiles (screenshot above). The first tile displays the form header department code and name. The next four tiles display the sum of the revision amounts for the first, second, third, and fourth quarters.

1.2.2. Tiles can be refreshed by clicking on the refresh icon in the lower lefthand corner of each tile. Additionally, the Quarter tiles can be 'flipped' to show the reverse side by clicking on the three

dots in the lower righthand corner.

1.2.3. Red tiles indicate that the revisions for that quarter are *not* balanced. Navy tiles indicate that revisions *are* balanced.

1.2.4. Clicking on the three dots on the lower righthand side of the First Quarter tile provides additional information on the fund(s) that is not in balance.

Expenditures  
Update Successful

Form Header Org  
**002**  
Alcoholic Beverage  
Control Bd

Q1 Total  
Funds Out of balance:  
0100

Click the ...

1.2.5. For this form, the fund 0100 is out of balance. To balance the revision, the user needs to update existing rows or add a new row(s) for fund 0100 to net the revision lines to 0.

1.2.6. Once the user has saved the change(s) to balance the revisions for each quarter, they will need to click the refresh icon in the lower lefthand side of the tile to see the color change from red to navy (or the Refresh button in the gray header bar to refresh all).

Expenditures  
Update Successful

Form Header Org  
**002**  
Alcoholic Beverage  
Control Bd

Q1 Total  
FY 2025 First Quarter

Q2 Total  
0  
FY 2025 Second Quarter

Q3 Total  
0  
FY 2025 Third Quarter

Q4 Total  
0  
FY 2025 Fourth Quarter

Click the ...

X Close + Add New Copy Export Import Refresh

Row	Audit Trail	Approp Class	Fund	Subfund	Function	Approp Unit	Budget Object	Budget Object Name	Appi	Appropriation Category Name	FY 2025 First Quarter	FY 2025 Second Quarter
1	Q	011	0100	0	0002	0001	0300	Travel-In State	6	Transfer	750	0
2	Q	011	0100	0	0002	0001	0400	Travel-Out of State	6	Transfer	-750	0
3	Q	011	0100	0100-235	0002	0001	9999	Source of Funds	6	Transfer	0	0

Records per page: 50 Advanced Search

### 1.3. Updating form data using Export/Import Excel functionality

1.3.1. To update form data using Excel, click on the Export button in the budget form header row, and open the resulting Excel file.

X Close + Add New Copy **Export** Import Refresh

Row	Audit Trail	Approp Class	Fund	Subfund	Function	Approp Unit	Budget Object	Budget Object Name	Appi	Appropriation Category Name
1	Q	011	0100	0	0002	0001	0300	Travel-In State	6	Transfer
2	Q	011	0100	0	0002	0001	0400	Travel-Out of State	6	Transfer
3	Q	011	0100	0100-235	0002	0001	9999	Source of Funds	6	Transfer

1.3.2. The Export will download an Excel file with the same information that is in the Details grid.

1.3.3. Once in the Excel file, make needed updates, including adding new rows.

1.3.4. Once complete, Save the Excel file as a new file.

1.3.5. To load the changes into Excel, click on the Import button.

Row	Audit Trail	Approp Class	Fund	Subfund	Function	Approp Unit	Budget Object	Budget Object Name	Appri	Appropriation Category Name	FY 2025 First Quarter	FY 2025 Second Quarter
1	🔍	011	0100	0	0002	0001	0300	Travel-In State	6	Transfer	750	
2	🔍	011	0100	0	0002	0001	0400	Travel-Out of State	6	Transfer	-750	
3	🔍	011	0100	0100-235	0002	0001	9999	Source of Funds	6	Transfer	0	

1.3.6. Click the 'Browse' button to find and select the updated file, then click 'Load File'.

**Budget Form Import**

✕ Close   ✓ Validation Results

---

Browse   C:\fakepath\Book1.xlsx

Load File

1.3.7. The system will compare records on the Excel file with what is already on the form, validate for errors and invalid codes, and load the new amounts/lines into the form.

**Note:** If the screen loads with red, that means there were errors on the import and no lines were loaded. Click on the Validation Results button to see the errors and corresponding row number. Correct the errors on the Excel and reimport file.

## 1.4. Budget Revisions Report

1.4.1. To access the Budget Revisions report, from the BFM home page, navigate to Links > BFM Reporting.

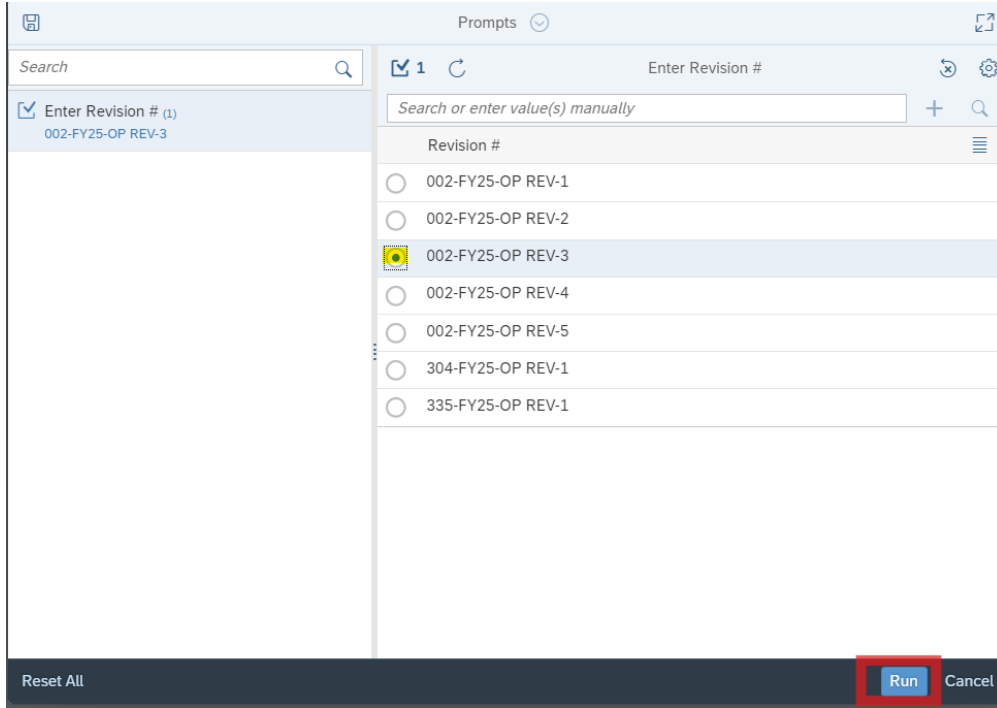


1.4.2. In the Reporting folder view, navigate to the '3 Department Reports' folder, then '3.3 Budget Revisions' folder.

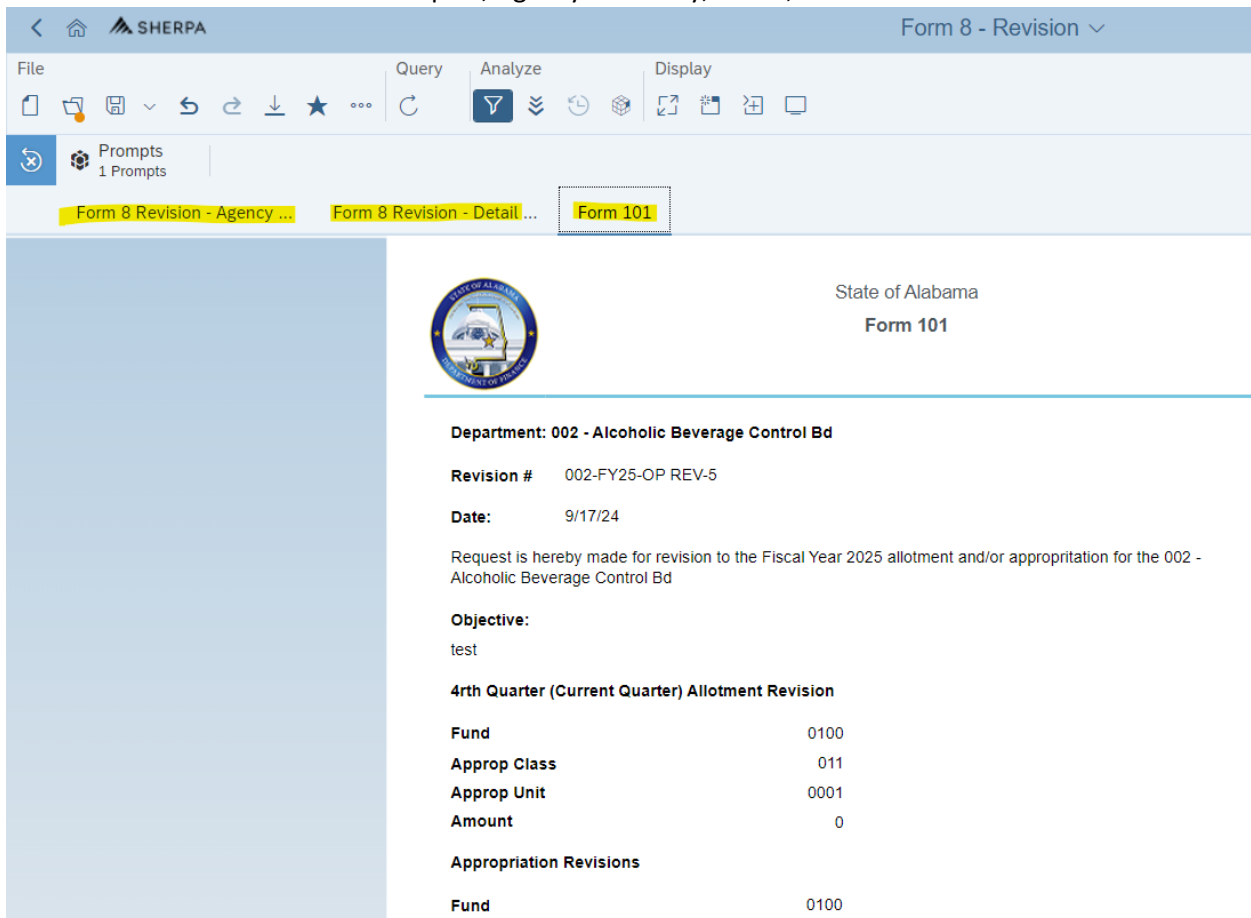
Public Folders / 3 Department Reports /		Title	Type
<input type="checkbox"/>	Personal Folders		
<input type="checkbox"/>	My Subscribed Alerts		
<input checked="" type="checkbox"/>	Public Folders		
<input checked="" type="checkbox"/>	3 Department Reports		
<input type="checkbox"/>		3.1 Budget Requests	Folder
<input type="checkbox"/>		3.2 Operating Plans	Folder
<input checked="" type="checkbox"/>		3.3 Budget Revisions	Folder
<input type="checkbox"/>		3.4 QPR's	Folder

1.4.3. Click on the **Form 8 – Revision** report. A pop up will prompt you to select a Revision #. Scroll or use the search bar to select the appropriate revision, then click, Run.

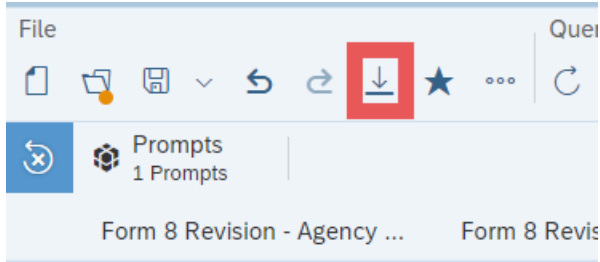




1.4.4. There are three tabs to the report, Agency Summary, Detail, and Form 101.



1.4.5. Download the report by clicking on the Export (down arrow) button under 'File'.



1.4.6. Updates can be made to the Form 101 in the downloaded file. Attach the report to the Revision form before submitting.

1.4.7. To attach the report, navigate back to the Revision Form header, and add under the 'Attachments' tab.

Form 8 - (7000) Plan Revision

ID	Revision #	Stage Code	Stage Name	Short Name	Department	Rows	Attach Count	Last Update	Last User	Workflow	Actions
10332	002-FY25-OP REV-1	7001	Initial	Transfer	002	3	1	9/16/2024	End User Report	Submit	Header
10338	002-FY25-OP REV-2	7003	Dept Level 2 Approver	Transfer	002	4	1	9/17/2024	End User Report	Submit	Header
10339	002-FY25-OP REV-3	7004	EBO Router	Transfer	002	3	1	9/17/2024	End User Report	Submit	Header

Budget Form Header

🔍 Mention History 🔍 Mention 🔄 Submit ⚙️ Configuration ✖ Close

Instance ID	Form Definition	Definition Name
10339	7000	Form 8 - (7000) Plan Revision

**Stage Code:\***

**EBO Router**

**Department:**

**Alcoholic Beverage Control Bd**

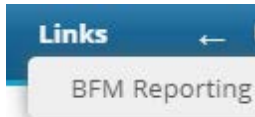
Header
Expenditures
Attachments

Attachments

## 2. BFM Reporting

### 2.1. How to Access BFM Reports

- **Access through BFM Links:** Log in to BFM and click on the Links dropdown / BFM Reporting



### Multiple Sessions

Use **CTRL+N** to open two sessions of your choice of browser. This will allow you to have reports open in one tab and the BFM application open in another window. You can enter data in BFM and refresh reports. This is especially useful if you have two monitors.

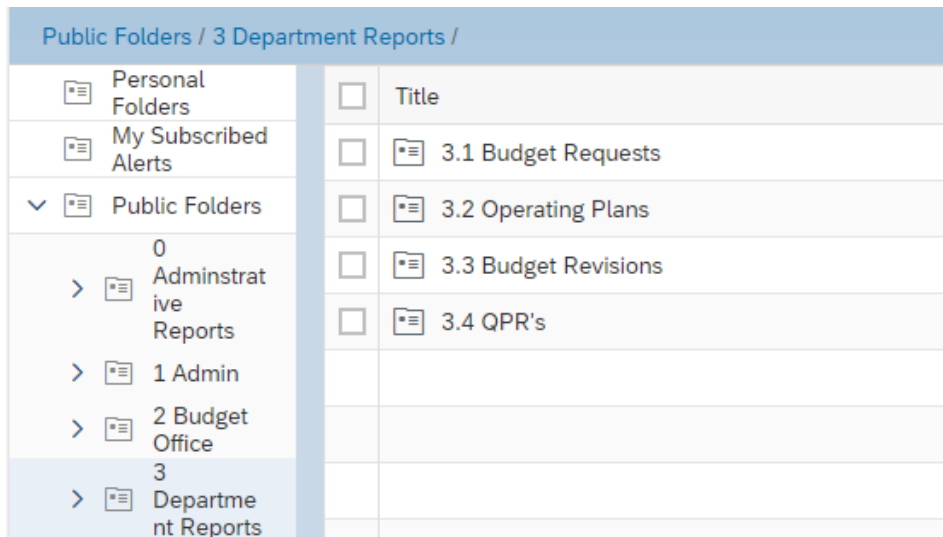
### Logging In

Single-sign on is used to log onto BI Launch Pad, there is no second log in.

### Running Reports

- 2.1.1. There are two tabs in the upper left, **Home** and **Documents**. Click on **Documents** to see the report folders.

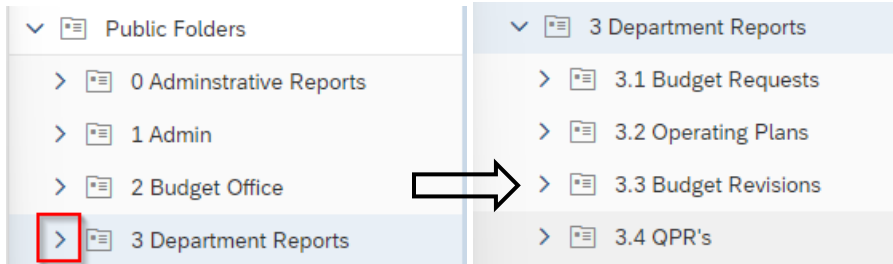
### Basic Navigation

A screenshot of a navigation pane in a software application. At the top, there is a blue header bar with the text "Public Folders / 3 Department Reports /". Below this, there is a list of folders and reports. On the left side, there are expandable folders: "Personal Folders", "My Subscribed Alerts", "Public Folders" (which is expanded), "Administrative Reports", "1 Admin", "2 Budget Office", and "3 Department Reports". On the right side, there is a list of reports with checkboxes: "Title", "3.1 Budget Requests", "3.2 Operating Plans", "3.3 Budget Revisions", and "3.4 QPR's".

Public Folders / 3 Department Reports /	
<input type="checkbox"/> Personal Folders	<input type="checkbox"/> Title
<input type="checkbox"/> My Subscribed Alerts	<input type="checkbox"/> 3.1 Budget Requests
<input checked="" type="checkbox"/> Public Folders	<input type="checkbox"/> 3.2 Operating Plans
<input type="checkbox"/> Administrative Reports	<input type="checkbox"/> 3.3 Budget Revisions
<input type="checkbox"/> 1 Admin	<input type="checkbox"/> 3.4 QPR's
<input type="checkbox"/> 2 Budget Office	
<input type="checkbox"/> 3 Department Reports	

- 2.1.2. **Department Reports** is where all standard reports are housed. The active slider is above the white space; in this screen shot Folders is Active. If My Documents is Active, Folders is all the way at the bottom of the screen. When you click on **Department Reports** it will slide to the top and open the **Department Reports** section.

- 2.1.3. Click on the arrow to the left of any folder to expand the folder structure.



2.1.4. Click on any folder to see the reports available.

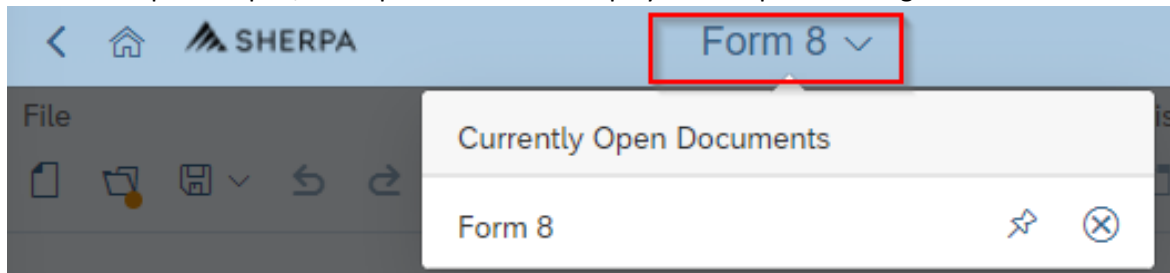
Personal Folders	Title	Favorites	Type	Description	Last Updated	
My Subscribed Alerts	Form 8		Web Intelligence		Mar 20, 2024 7:42 AM	...
Public Folders	Post Secondary Operations Plan		Web Intelligence		Mar 28, 2024 2:12 PM	...
0 Administrative Reports	Salary Projection Results		Web Intelligence		Mar 18, 2024 2:32 PM	...
1 Admin						
2 Budget Office						
3 Department Reports						
3.1 Budget Requests						
3.2 Operating Plans						
3.3 Budget Revisions						
3.4 QPR's						

## 2.2. Opening a Report

2.2.1. Navigate through the folders to the report to be run.

2.2.2. **Double click** on the report to be opened

When the report is open, the report header will display as a dropdown along with the Home button.



More than one report can be opened during the same session. Each report will appear as an additional tab to the right of existing tabs. To open additional reports, click the Documents tab to return to the available reports.

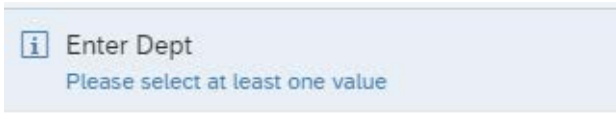
Most reports will be set to 'auto refresh', meaning the report will refresh the data after you open it. All end user reports have prompts (see Report Prompts below) that must be completed.

## Report Prompts

The prompt screen will display default values selected when a report is opened or when a report is refreshed. In the Prompts Summary area there may be multiple prompts that appear.

- You must click on each Prompt you wish to fill out (or is required) and follow the procedures below.
- The active Prompt is highlighted in Blue; there are four distinct prompts in the screen print.

- Optional prompts have a green circle with a checkmark when the prompt is empty.
- Required prompts have a red circle with an “x” when the prompt is empty.
- Depending on the report that is opened, all prompts (listed below) may not be available. Each report may have different prompts.

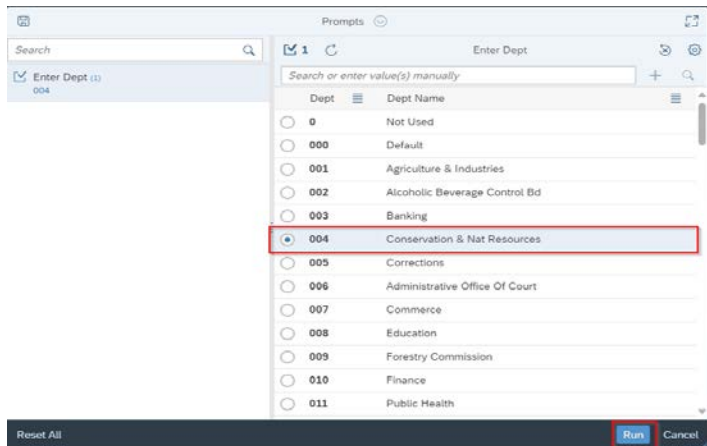


2.2.3. To change the default prompt value there are three options:

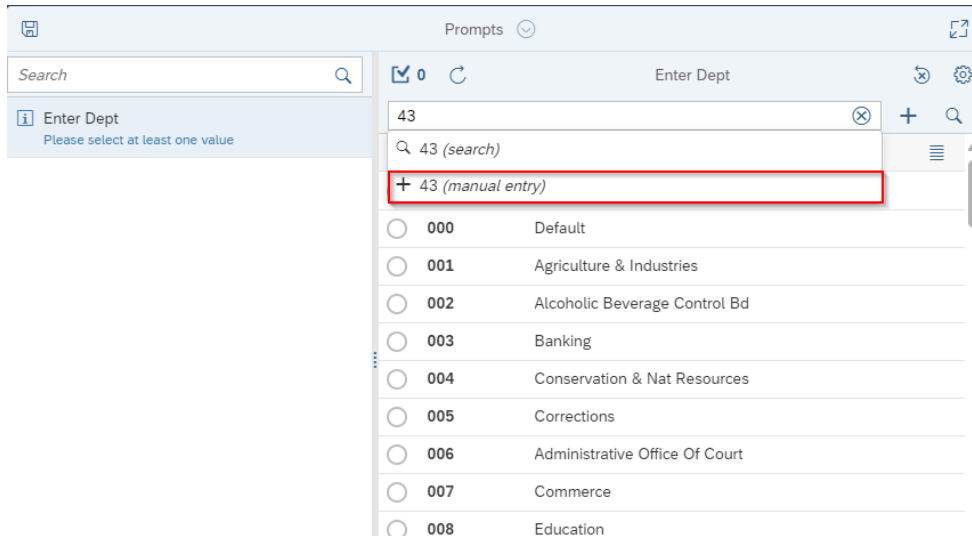
- Selecting a value from a list
- Entering a value
- Searching for a value

2.2.4. To select a **value from a list**, OPEN THE desired report. All valid prompt values will be shown in the box below. SELECT THE VALUE YOU WERE LOOKING FOR AND CLICK THE ‘RUN’ Button. For a LIST type prompt, you can repeat this and select multiple codes. You can also hold CTRL and Click to select multiples at one time.

Click on desired value and click ‘Run’ button:



To **enter a value**, type the value into the "SEARCH OR ENTER VALUE(s) manually" BOX, then click on manual entry option.



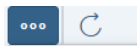
After clicking on an item, the default prompt value (if there is one) is replaced.

- 2.2.5. In many cases the values will automatically populate when opening the report. To search for a value, type a value in the search bar.
- 2.2.6. Once all Prompt values have been selected, Click the “Run” button. The report will run. If “Run” is not highlighted (appears light gray), this means a required prompt has not been completed.

## Report Icons



### Toolbar Actions



Print current report (tab) or all reports (all tabs).



Export current report (tab) or all reports (all tabs) into a PDF or Excel.



Refresh data by rerunning using the prompt window.



Enables the navigation capability in the report.



Displays the filter bar at the top of the report. Objects can be added to the filter bar to restrict what is displayed in the report.

### Side Panel Actions



Displays the Navigation Map which includes all report tabs and any sections added to report navigation.



Displays the User Prompt Input options.

## Report Navigation – Document Tabs

Different views of the same data can be captured in report tabs. First, click on the “Navigation Map” button on the far-left side. The Navigation Map will appear. There are two ways to move between tabs within a report: the Navigation Map or the Tab Strip.

The screenshot shows the SHERPA report interface for the State of Alabama, Fiscal Year 2025. The report title is "Form 8 - Operations Plan -Function Summary c". The report includes metadata for Department (001 - Agriculture & Industries), Approp Class (011 - Agricultural Development Servi), and Function (0002 - Market and Promotional Services). The main table displays "Expenditures by Major Object" with columns for Quarter 1, Quarter 2, Quarter 3, Quarter 4, and Total Plan. The table lists various object codes and their corresponding expenditure amounts, all of which are zero in this view. On the right side, a "Navigation Map" panel is visible, containing a search bar and a list of object codes: 011-0002, 651-0430, 651-0433, 651-0440, 652-0430, 652-0433, 652-0440, 652-0441, 656-0430, 656-0440, and 656-0441. The top of the interface shows a tab strip with four tabs labeled "Form 8 - Operations Plan ...".

### Navigation Map

2.2.7. To display the tab, click on the tab in the Navigation Map. THE TAB CURRENTLY DISPLAYS OPTIONS WITHIN the report.

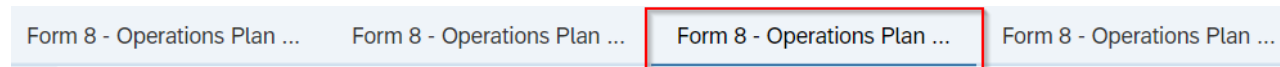
This image shows a close-up of the "Navigation Map" interface. It features a search bar with the placeholder text "Search for..." and a magnifying glass icon. Below the search bar is a list of object codes: 011-0002, 651-0430, 651-0433, 651-0440, 652-0430, 652-0433, 652-0440, 652-0441, 656-0430, 656-0440, and 656-0441. The interface also includes a menu icon (three horizontal lines), a chat icon, a settings icon, and a user prompt icon (curly braces).

2.2.8. If a tab has a plus sign, report sections have been added to the navigation map.

2.2.9. Clicking on the sub-tab navigation item will display that specific section in the report.

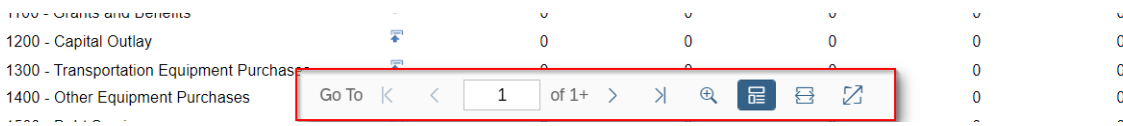
### Tab Strip

2.2.10. To display the tab, click on the tab in the Tab Strip. THE TAB DISPLAYED IS CURRENTLY underlined.

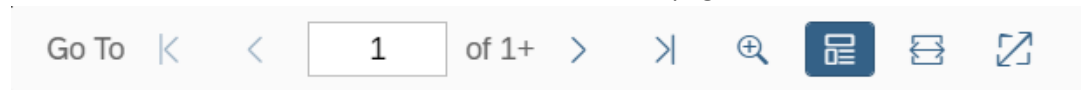


### Paging

To move between pages of a report, click the arrows or enter a page number.



2.2.11. To advance pages, click the **inner arrows** > to move one page at a time and the **outer arrows** >> to move to either the first or last page.

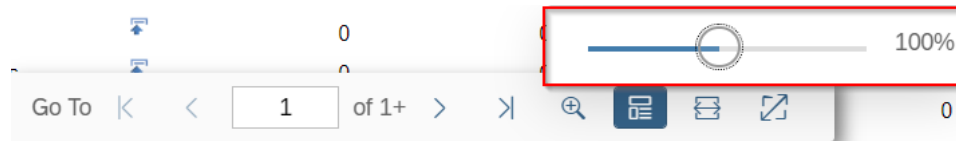


2.2.12. To select a specific page, click on Page **1 of 1** to enter a page number and then click **Enter**.



### Zoom

2.2.13. To change the viewable portion of a report, change the zoom percentage on the bottom tool bar. THE SLIDER WORKS IN INCREMENTS OF 10.

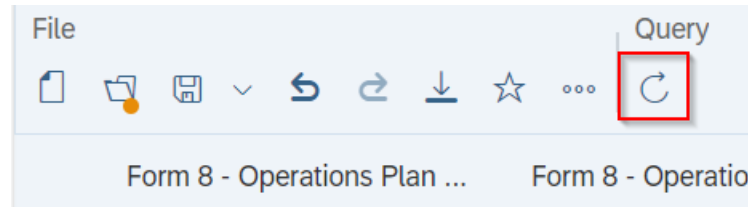


## Refreshing a Report While Open

Once a report is opened, the values in the report can be updated by refreshing the report.

### Refresh with Prompts

2.2.14. Click the Refresh button in the tool bar under the report name:



2.2.15. The prompt screen reappears. Complete the report prompts as directed above.

### Refresh From User Prompt Input



In the upper left, the Navigation Map/Document Summary drop down contains an option for User Prompt Input. Selecting this allows you to change values by simply typing in new values and clicking Run. There is a slight time savings to using this method if constantly refreshing the report.

2.2.16. TYPE IN THE ORGANIZATION OR OTHER VALUES IN THE PROMPT AREAS. You must type in a valid entry.

Enter Dept

026

Dept	Dept Name
026	Examiners Of Public Accounts

2.2.17. Click **Run**. The report will be refreshed with the data for the values you entered.

## Limiting Data Using Input Controls

Input Controls limit data displayed in the report after refreshing.

Home Documents Department Overview

File Properties Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Tools Position Linking

Input Controls

- New Group Map Reset
- Document Input Controls (1)
  - Actv - Name (Query 1)
    - 1411 - Parks Recreation & Cu
- Report Input Controls (0)

**41 - Parks & Recreation**

Actv - Name	2017 Actuals	2018 Year to Date Actuals	2018 Adopted Budget	2019 Requested Budget	2019 Proposed Budget	2019 Adopted Budget
1411 - Parks Recreation & Culture Administratio	0	0	737,436	2,564	0	0
<b>Sum:</b>	<b>0</b>	<b>0</b>	<b>737,436</b>	<b>2,564</b>	<b>0</b>	<b>0</b>

Object Group1 - Name	2017 Actuals	2018 Year to Date Actuals	2018 Adopted Budget	2019 Requested Budget	2019 Proposed Budget	2019 Adopted Budget
50 - Salary & Wages	0	0	386,059	0	0	0
51 - Benefits & Other Employee Items	0	0	112,542	0	0	0
52 - General Supplies	0	0	9,700	2,564	0	0
53 - Professional & Other Services	0	0	140,655	0	0	0
54 - Promotional, Education, & Travel	0	0	6,560	0	0	0
55 - Operating Expenses	0	0	59,380	0	0	0
56 - Miscellaneous Expense	0	0	3,800	0	0	0
57 - Repair & Maintenance	0	0	18,740	0	0	0
59 - Fixed Assets	0	0	0	0	0	0
<b>Sum:</b>	<b>0</b>	<b>0</b>	<b>737,436</b>	<b>2,564</b>	<b>0</b>	<b>0</b>

- 2.2.18. Click on the **Input Control** icon to display the input control options.
- 2.2.19. Select one or many values from the input control. Hold down Ctrl to select multiple values.
- 2.2.20. Click **OK**
- 2.2.21. Select “All values” and click **OK** to return to the complete data set.

## Exporting a report

Options to export include all report tabs or data as PDF, Excel, CSV, or Text. The Export icon on the upper tool bar provides an Export popup.

Expenditures by Major Object	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Plan
0100 - Personnel Costs	0	0	0	0	0
0200 - Employee Benefits	0	0	0	0	0
0300 - Travel-In State	0	0	0	0	0
0400 - Travel-Out of State	0	0	0	0	0
0500 - Repairs and Maintenance	0	0	0	0	0
0600 - Rentals and Leases	0	0	0	0	0
0700 - Utilities and Communication	0	0	0	0	0
0800 - Professional Fees and Services	0	0	0	0	0
0900 - Supplies, Materials, and Operating Expenses	0	0	0	0	0
1000 - Transportation Equipment Operations	0	0	0	0	0
1100 - Grants and Benefits	0	0	0	0	0
1200 - Capital Outlay	0	0	0	0	0

- 2.2.22. Select **Report** or **Data**. Report allows a selection of one, multiple, or all report tabs. Data allows a selection of queries defined for the report.

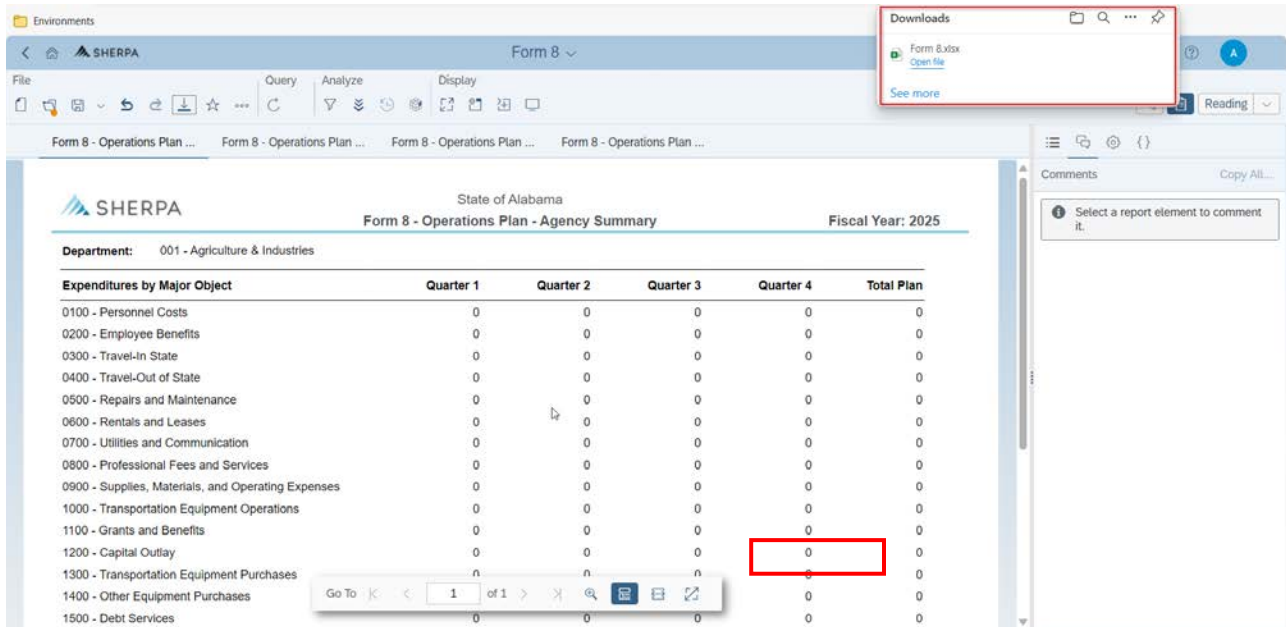
Export to

Export to

- 2.2.23. Select **File Type**. Each file type has additional export options.

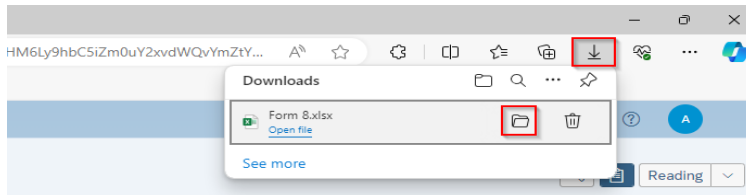
- 2.2.24. Click **OK**.

2.2.25. Depending on your browser and settings, a message may appear in the lower portion of the screen. If you get this or any other message, click **Open File** or **See more**. If you do not get a message, it may have defaulted to Save.



### Saving as Excel notes:

- The file may be saved to your Downloads folder. It is not always obvious that it was saved. There is a small down arrow in the upper right of Internet Explorer that indicates it has been saved. You can click on the folder icon to be taken to see which folder the file was downloaded to.

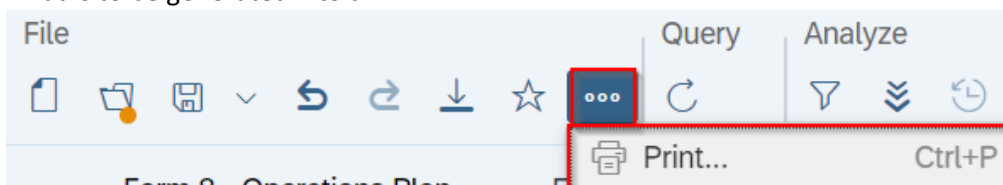


### Saving as PDF Notes

The PDF will include the report header and provide navigation through the tabs on the left-hand side.

## Printing a Report

Clicking directly on the Print icon will download a PDF of the entire document (all tabs) that can be printed. Clicking on the arrow on the print button and selecting Print will provide additional options for what is to be generated into a PDF.



Print

Range

- All reports
- Current report

- All
- Current Page
- Pages

Page Size

Letter

Orientation

- Portrait
- Landscape

Margins

Top:  inches

Bottom:  inches

Left:  inches

Right:  inches

Scaling

Adjust to:  %

Fit to:  page(s) wide

page(s) tall