Generate an online report from Financial Online Reporting Services (FORS) Using specific report templates

1. Launch your Internet browser session (i.e., Start > Programs > Internet Explorer).
2. Navigate to: [https://FORS.emory.edu](https://FORS.emory.edu).
3. Enter your login credentials:
   a. User Name: EmoryUnivAD\[your user id]
   b. Password: [usual network password]
   c. If needed, click the **Remember my password** check box to reduce duplicate sign in prompts.

<table>
<thead>
<tr>
<th>Step</th>
<th>Page Section</th>
<th>Action/Comments</th>
</tr>
</thead>
</table>
| **Step 1** | What to research prior to generating a FORS report | Be familiar with the ChartField values to be queried:  
- Department  
- Operating Unit  
- Project  
- Fund |
| | Determine the nature of the fiscal information you are researching:  
- Departmental Budgets  
- Non-Sponsored Project  
- Sponsored Projects/Grants |  
Are you familiar with the term “Budget vs. Actuals”?  
What Fiscal Period/Year is being researched?  
What is the latest accounting close date?  
Do you have an active session of Compass open? |
| **Step 2** | Click the ICON corresponding to the appropriate report type:  
**BOP** = Budget Operating Report  
**SPP** = Sponsored Project Report  
**NSP** = Non-Sponsored Project Report |  
Choose appropriate ChartField combination:  
- Click the Operating Unit dropdown arrow.  
- Scroll to and select appropriate value.  
- Click the Accounting Period dropdown arrow.  
- Scroll to and select appropriate value. |
| **Step 3** |  
Choose appropriate ChartField combination:  
- Click the Operating Unit dropdown arrow.  
- Scroll to and select appropriate value.  
- Click the Department dropdown arrow.  
- Scroll to and select appropriate value. |  
Click outside of the dropdown area to proceed.  
Allow page to refresh. |
| **Step 4** |  |  
Choose appropriate Chartfield combination:  
- Click the Department dropdown arrow.  
- Scroll to and select appropriate value. |
| **Step 5** |  |  
Choose appropriate Chartfield combination:  
- Click the Department dropdown arrow.  
- Scroll to and select appropriate value. |
Step 6

- Click outside of the dropdown area to proceed.
- Allow page to refresh.

Step 7

If not generating either a NSP or SPP FORS report, proceed to step 9.
If generating either a NSP or SPP FORS report, choose appropriate ChartField combination:

- Click the Project* dropdown arrow.
- Scroll to and select appropriate value.

*(NSP & SPP reports only)

Step 8

- Click outside of the dropdown area to proceed.
- Allow page to refresh.

Step 9

- Click the Output dropdown area, to choose the report presentation.

Step 10

- Click outside of the dropdown area to proceed.
- Allow page to refresh.

Step 11

- Click the View Report button to view output.

Step 12

<table>
<thead>
<tr>
<th>MTD</th>
<th>YTD</th>
</tr>
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<tbody>
<tr>
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<tr>
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<tr>
<td>653.97</td>
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</tr>
</tbody>
</table>

Scroll through report to view:
- Header Details
- Report Name/Reference
- Line item details by account number grouped by account pool
- Click hyperlinks to view supporting data.

**Additional resources:**

- Finance website: [www.finance.emory.edu](http://www.finance.emory.edu)
- Compass support Center - 9 am to 4 pm (Monday - Friday)
  - Email: [compass@emory.edu](mailto:compass@emory.edu)
  - Phone: 404-727-7000
- Sign up for Training: [www.emory.edu/elms-training/](http://www.emory.edu/elms-training/)
- Compass Online Reference Guide: [www.compass.emory.edu](http://www.compass.emory.edu)