Generate an online report from Financial Online Reporting Services (FORS)
Using the Search function

1. Launch your Internet browser session (i.e., Start > Programs > Internet Explorer).
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.

### Step 1: What to know prior to generating a FORS report using SEARCH

The SEARCH feature allows users to generate a report with specific known or partial information.

At a minimum the user must know the type of report to be requested and a value (partial or complete) associated to the attribute value. An attribute value could be a reference to a chartfield value, a reference to an Award, or the name of principle investigator.

Specifically:

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Operating (BOP)</td>
<td>Department # or description (partial or complete)</td>
</tr>
<tr>
<td>Non-Sponsored Project (NSP)</td>
<td>Project # or Name (partial or complete)</td>
</tr>
<tr>
<td>Sponsored Project (SPP)</td>
<td>Project # or Name (partial or complete)</td>
</tr>
<tr>
<td></td>
<td>Principal Investigator Name</td>
</tr>
<tr>
<td></td>
<td>Award # or Name (partial or complete)</td>
</tr>
</tbody>
</table>

Are you familiar with the term “Budget vs. Actuals”? What Fiscal Period/Year is being researched?
What is the latest accounting close date? What relevant reference will be associated to the report attribute?

### Step 2

Click the ICON corresponding to the report type SEARCH.

### Step 3

- Select the Report type.

### Step 4

- Select an appropriate Attribute category.
<table>
<thead>
<tr>
<th>Step</th>
<th>Page Section</th>
<th>Action/Comments</th>
</tr>
</thead>
</table>
| Step 5 |  | • Enter search **criteria** based on attribute selected*.  
  * (see grid in Step 1) |
| Step 6 |  | • Click the **View Report** button to view output. |
| Step 7 |  | • Scroll through the results page to find the desired report.  
  • Click the corresponding hyperlink*  
  (see below).  
  **Note:**  
  If BOP choose Department.  
  If NSPor SPP choose Project ID. |

**Note:** The report that is generated provides financial data based on the day the report is generated. To view related financial data from prior periods go, to step 8. If not, proceed to step 11.

| Step 8 |  | • Click the **Show/Hide Parameters** activation arrow. |
| Step 9 |  | • Update Parameters as needed*.  
  *All fields are active and pre-populated with criteria relevant to your selection in step 8. |
| Step 10 |  | • Click the **View Report** button to view output. |
| Step 11 |  | 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  
  • 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)