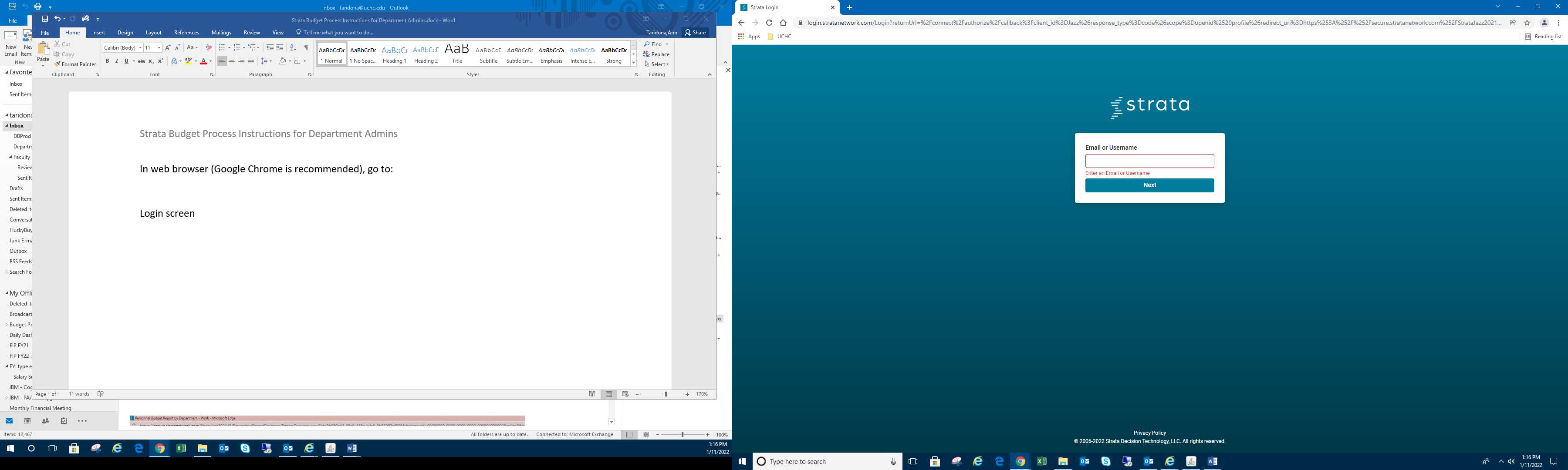
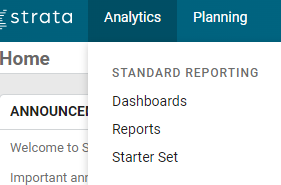
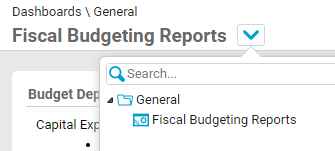
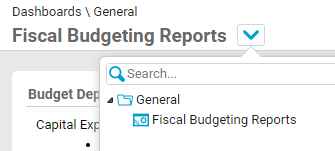
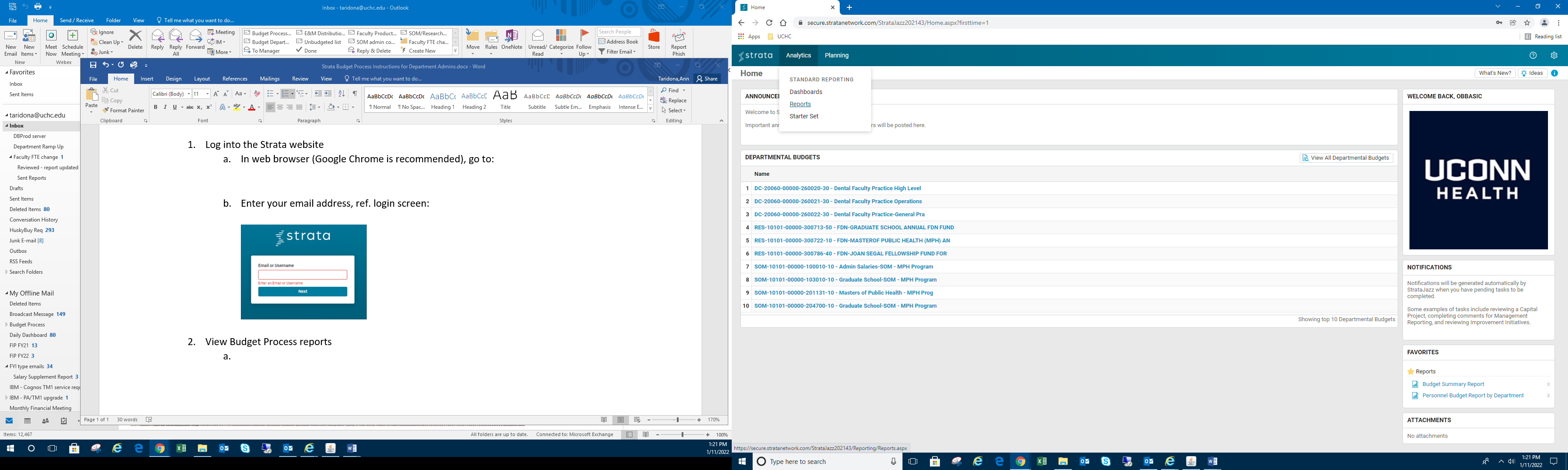
1. **Log into the Strata website**
   1. In web browser (Google Chrome  is recommended), go to:  
      <https://secure.stratanetwork.com/StrataJazz/login-fs.aspx>
   2. Enter your UConn email address and click Next button



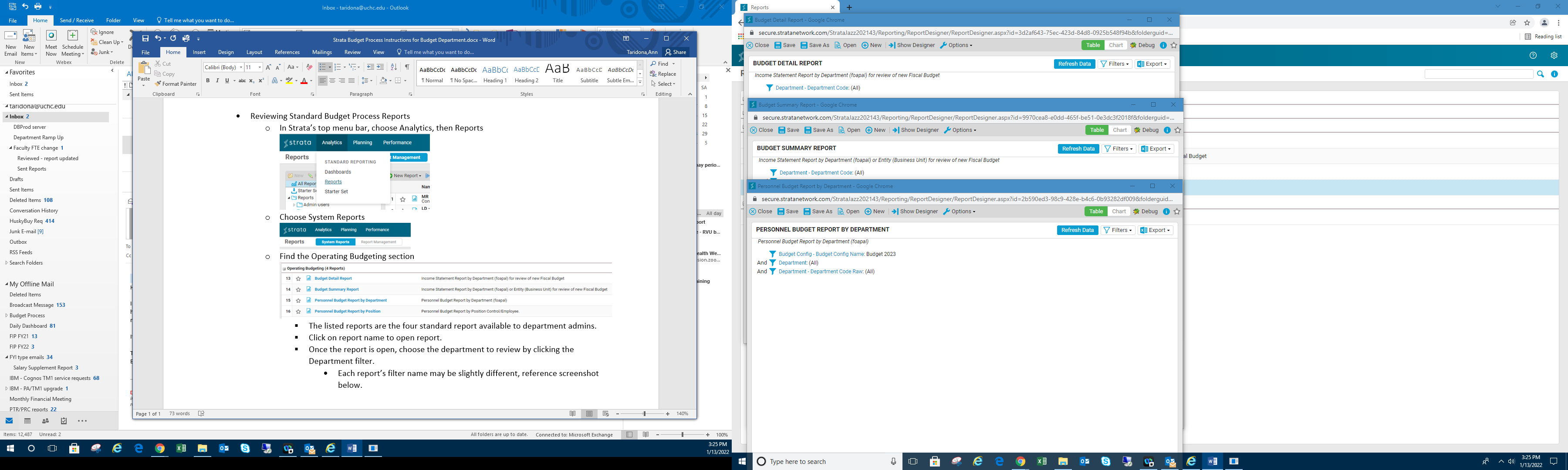
1. **Things to know**
   1. FOAPAL is Department in Strata
   2. Department format is ***Entity-Organization-Activity-Fund-Program***
   3. Frequently used reports can be marked as **FAVORITE** under **Option 2** below and show up on the home screen
   4. Single Click hyperlinks are used throughout Strata System
   5. After generating reports, **DO NOT SAVE**, as these are public reports
   6. Click **Close** option when finished with a report 
   7. When finished in Strata, Click the gear button  in the top right hand corner and select Log Out 
2. **Viewing Budget Process reports**
   1. **Option 1** – In Strata’s top menu bar, click Analytics, then Dashboards 
      1. Use the  menu to choose ‘*Fiscal Budgeting Reports*’ in the General folder (Note: depending on your security, it may default you to the correct screen)  
         
      2. Navigate to the reports under Management Reporting and Staffing Reports for the most commonly used reports.



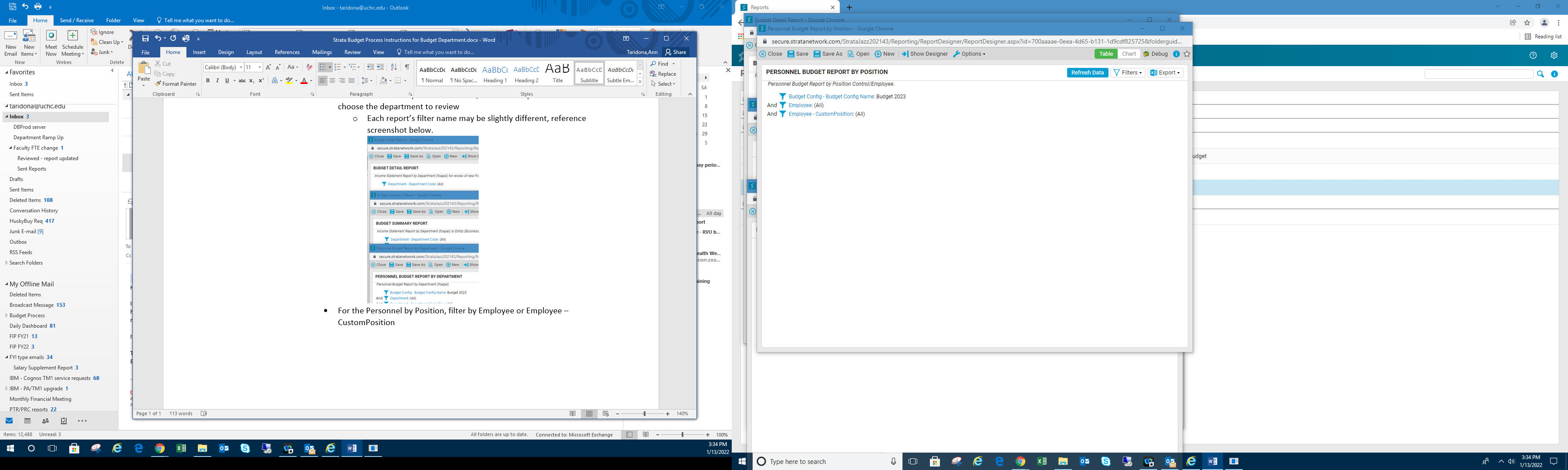
* 1. **Option 2** - In the Strata’s top menu bar, click Analytics, then Reports

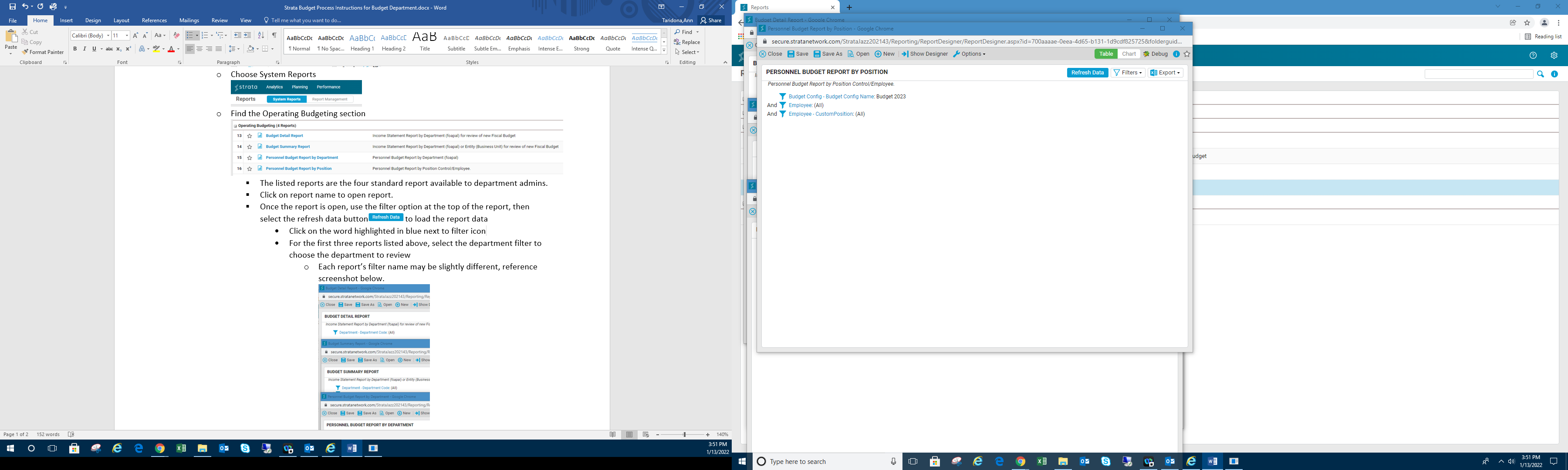


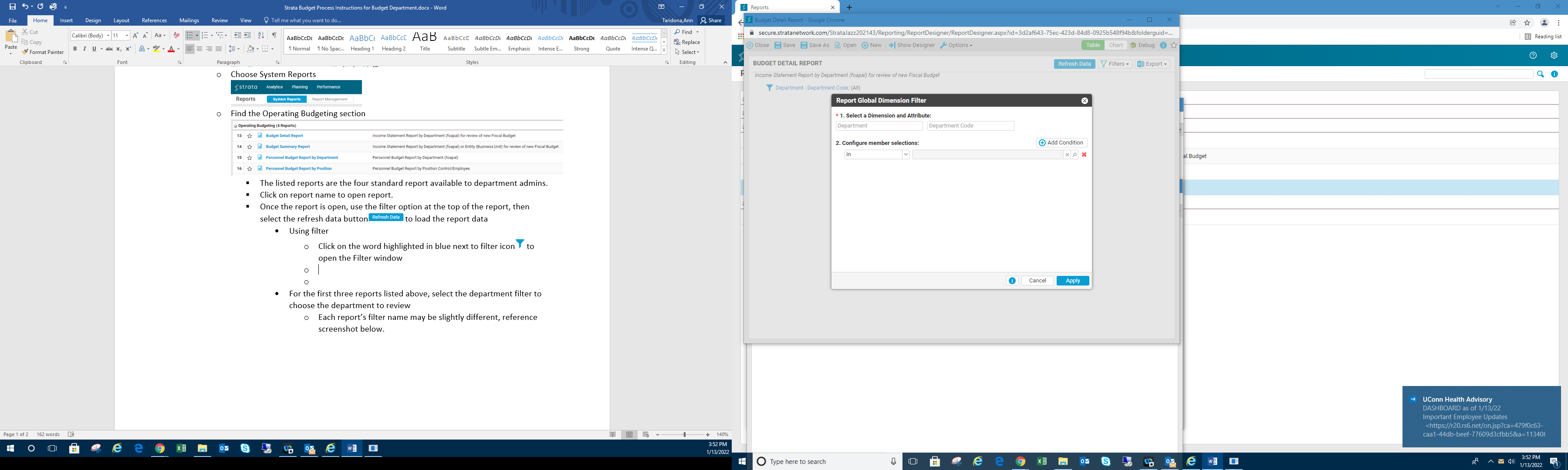
* + 1. On the System Reports page , navigate to a section to see available reports
       1. *Management Reporting section* – contains all GL/Profit and Loss based reports i.e. Monthly Variance Report, Balance Available Report
       2. *Operating Budgeting section* – should only be used during the budget process for creating a new fiscal budget
       3. *Productivity Reporting* – contains Staffing/Personnel reports
  1. Click on the report name to open report
  2. Use report filter options at the top of the report to select criteria to generate a report
     1. Each report’s filter name may be slightly different, reference screenshot below.

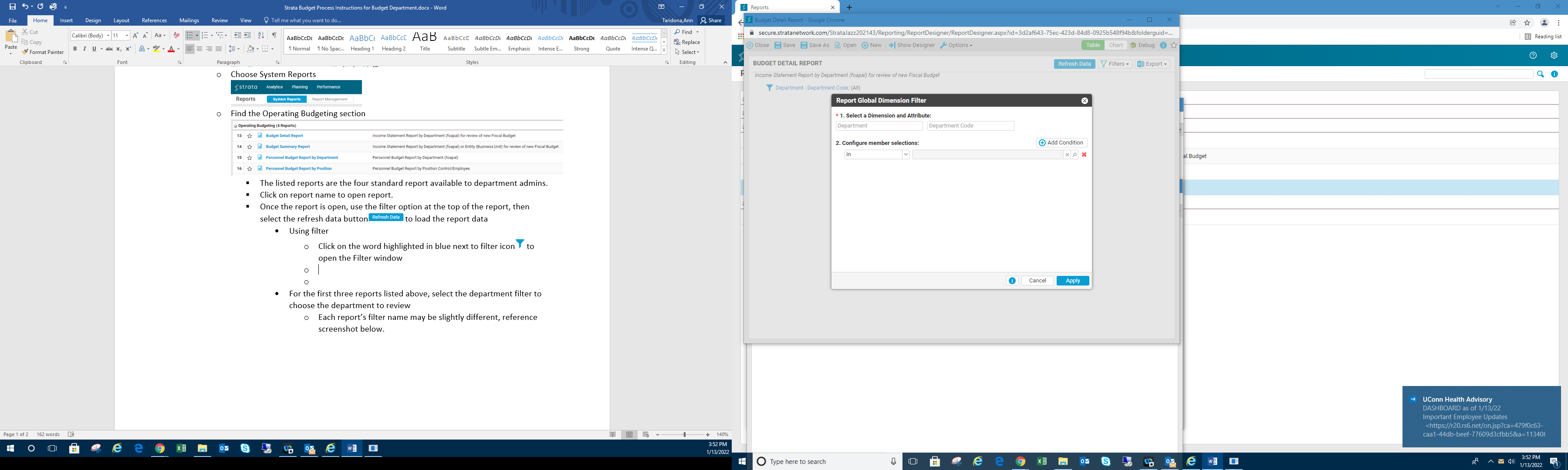
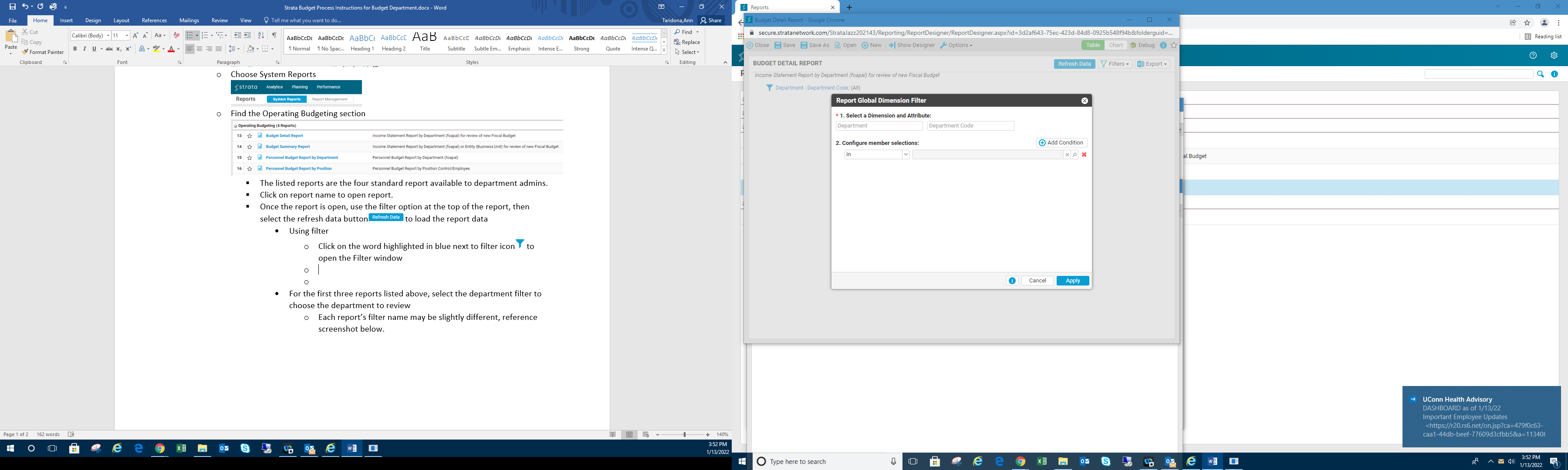


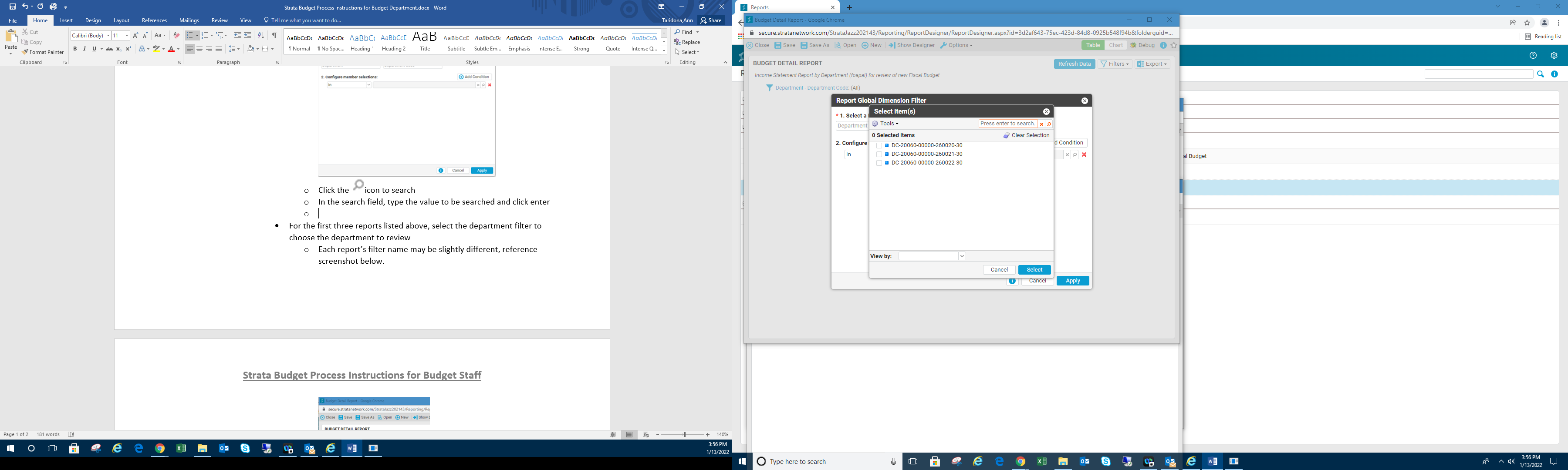
* + 1. For the Personnel Budget Report by Position, filter by Employee or Employee – CustomPosition



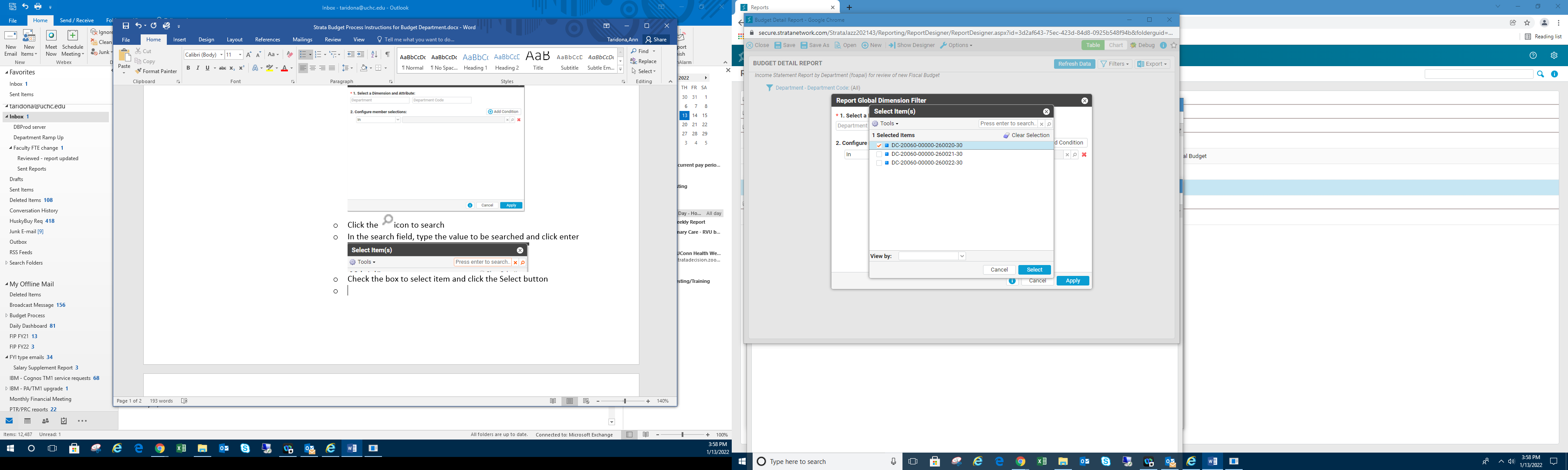
* + - 1. The Employee filter can search by any part of the position description included i.e. Employee name, Banner B#, Position Control number and Jobcode/Position Title
      2. The Employee – CustomPosition filter is the BannerHR PC number
    1. Using filters
       1. Click on the words highlighted in blue next to filter icon to open the Filter window



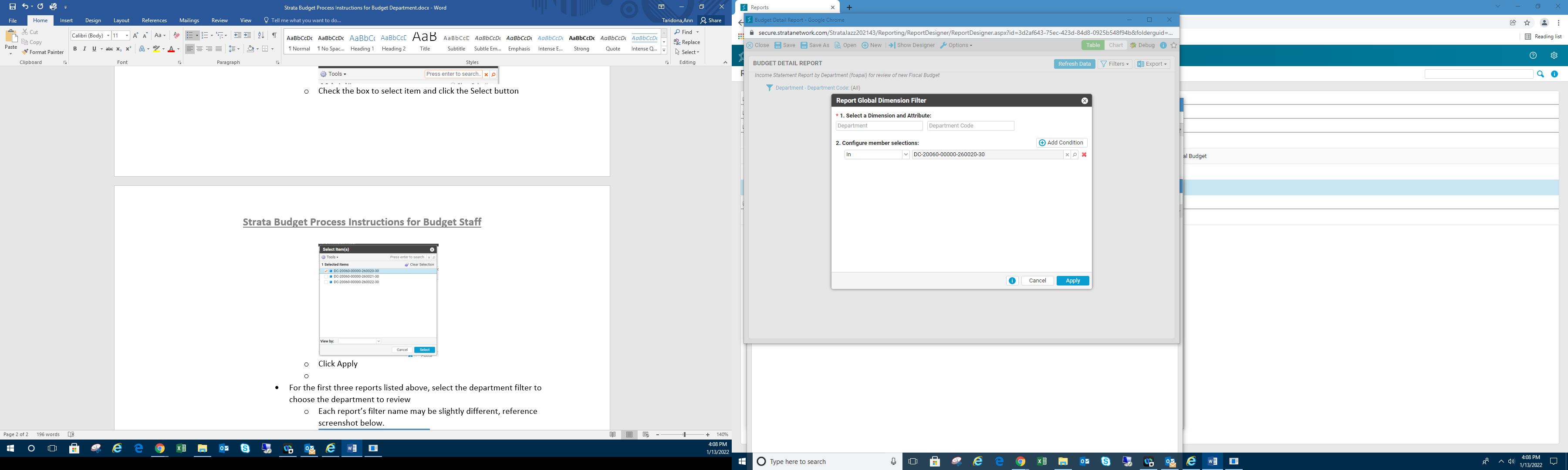
* + - 1. Under “**2. Configure member selections:**”, click the magnifying glass icon (located on the right side of the line) to search
      2. In the search field, type the value to be searched and click enter or click the icon

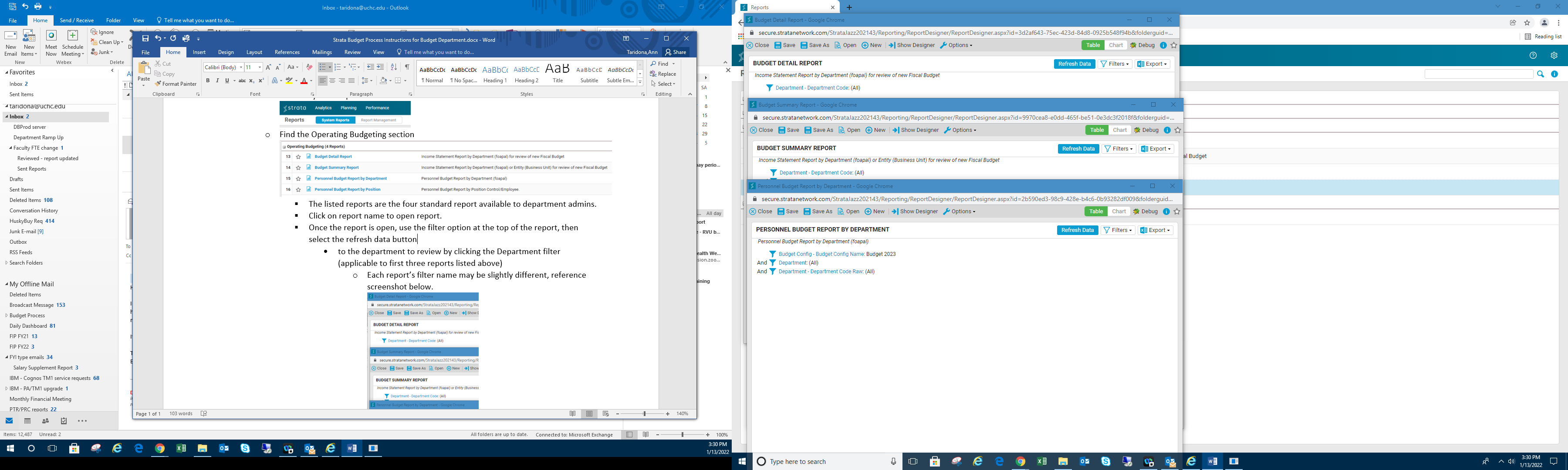


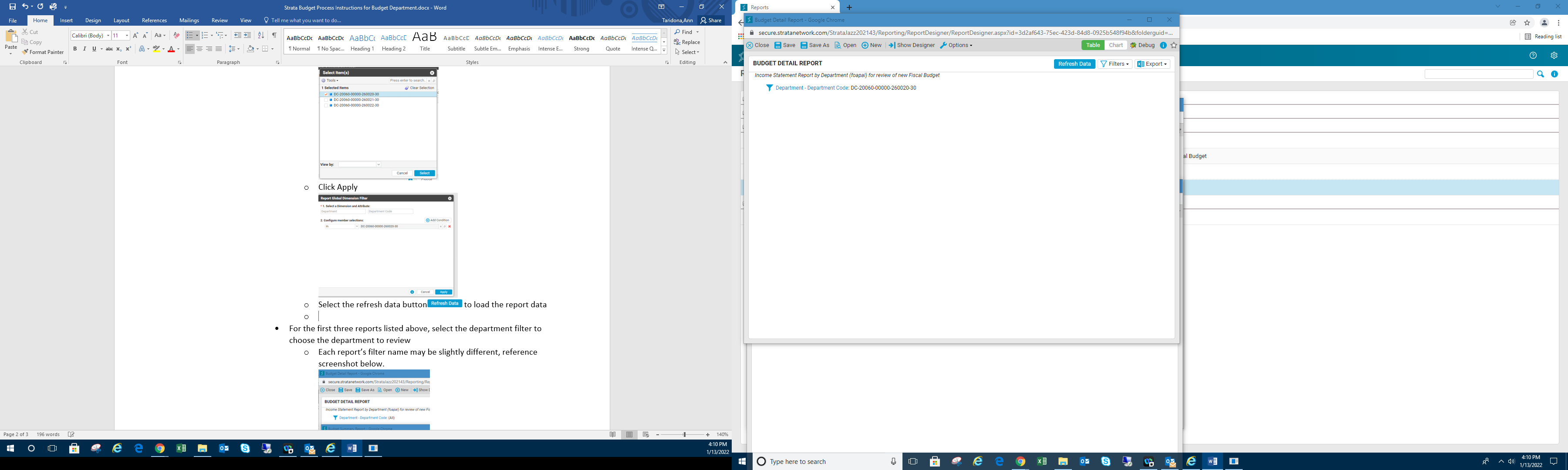
* + - 1. Check the box to select item and click the  button

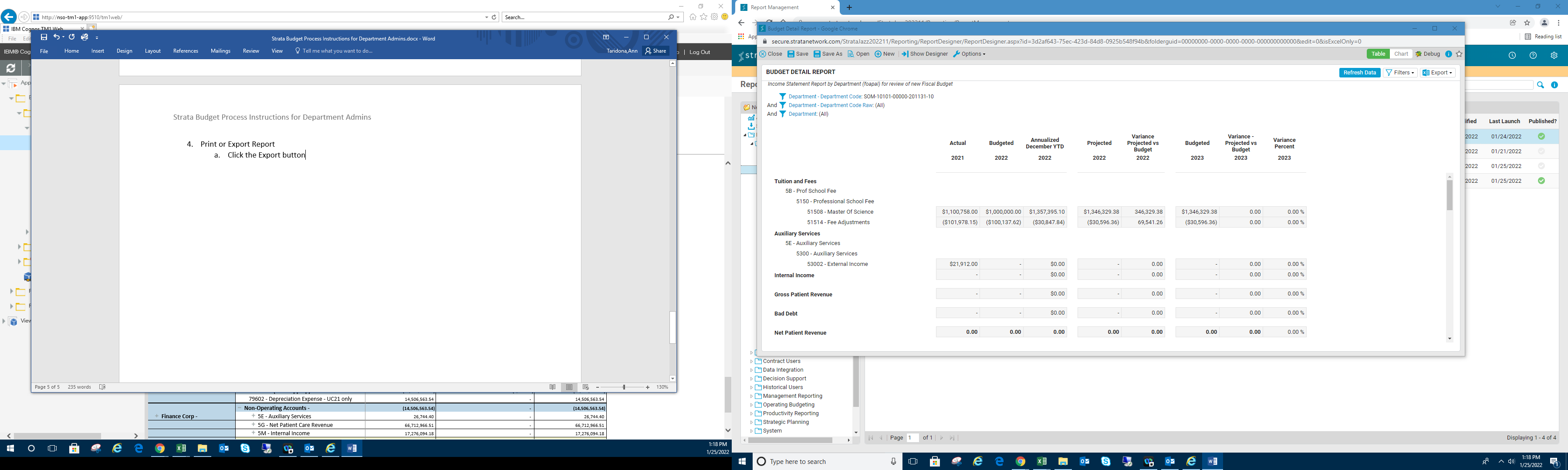
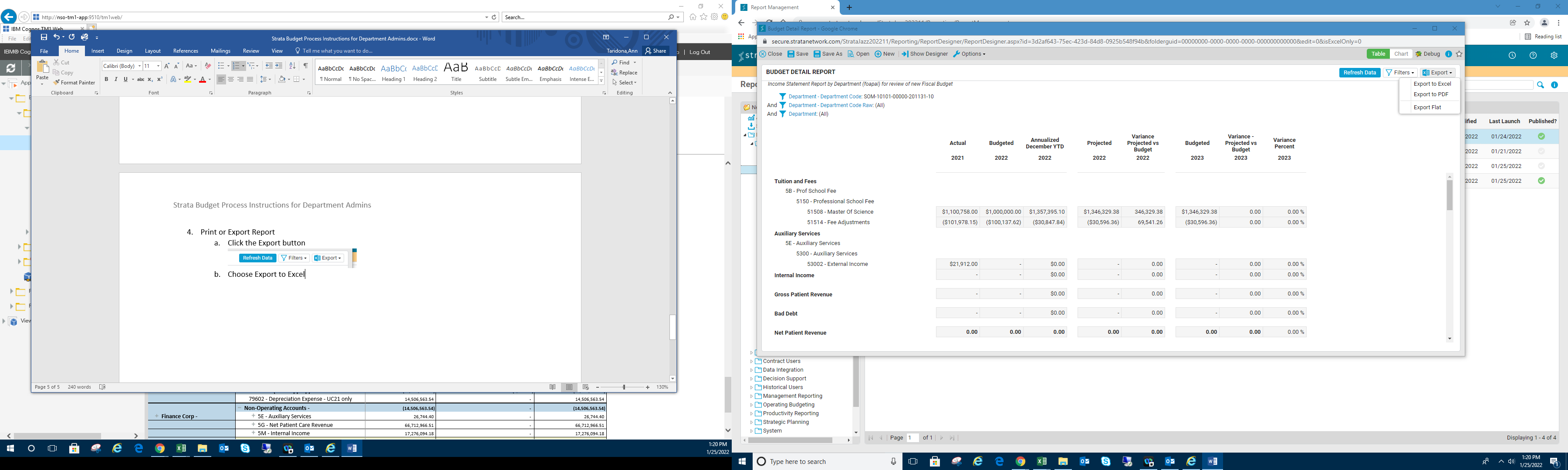


* + - 1. Click 



* 1. Select the refresh data button to load the report data



1. **Export Report to Print**
   1. Click the Export button  
      
   2. Choose Export to Excel  
      
      1. Report will pop up in the lower left hand corner of the Strata window. If using Edge  the report will pop up in the top right hand corner
      2. Click the report to open in Excel
      3. Report can be modified and saved however you choose
      4. Use the print option in Excel