Access MFD Reports in Crystal e-Portfolio (non-finance access)
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This guide is intended for non-finance members of staff requiring access to detailed reports of MFD usage and associated costs within their department/section.

Before you start
Before you can access MFD reports online via Crystal e-Portfolio, you must first request access to the system. Please complete the Crystal E-Portfolio online User Authorisation form:
https://www.abdn.ac.uk/staffnet/secure/request-access-1446.php
Please ensure you tick the MFD Reports checkbox, before submitting your form.

Once your application has been processed you will receive an e-mail notification from the Service Desk. This will include a password for accessing the Crystal e-Portfolio system. If you already have a Crystal e-Portfolio account for another system, e.g. Student Records, the password will remain the same.

** You must know your departmental budget code in order to display MFD Reports. **
If you don't know your budget code, contact your Departmental Finance Person.

1. Logging in
1. When you have your new Crystal e-Portfolio password, open Internet Explorer and go to:
   http://cmis.admin.abdn.ac.uk:85
2. At the Log On screen:
   - Enter your normal University username in the User Name text box, and your new Crystal password in the Password text box.
   - Leave the Authentication box set to LDAP.
   - Click on the Log On button.
3. On the next screen, click on the text MFD Reports.

   ![MFD Reports](image)

   If you don’t see this text, your access has been denied. Contact the Service Desk - www.abdn.ac.uk/staffnet/working-here/it-support.php for guidance.

4. Next, select the appropriate date range for your requirements:

   ![Date Range Selection](image)
2. Accessing MFD Reports

There are 2 different kinds of report. In both cases, you must know your departmental budget code in order to display MFD reports.

- **MFD Quarterly Report** (budget code parameter required)
  This report displays a breakdown of the (last calendar) quarterly MFD bill for the specified budget code.

- **MFD Date Range Report** (budget code and date parameters required)
  This report displays a breakdown of the MFD usage for the specified budget code calculated between the specified start and end dates (inclusive).

Instructions for running each report are given below.

2.1 Run MFD Quarterly Report

- To run, click once on **MFD Quarterly Report (budget code parameter required)** and select **Schedule** from the pop-up menu.

- In the **Schedule** window, under **Customize your options**, select **Parameters** from the drop-down menu.

- In the **New value** text field, enter your Billing Code, i.e. your departmental budget code. **Note**: This will be a 16 figure code comprised of 3 groups of figures. Please ensure you include a space between each of the 3 groups when entering your code.

- Click on the **Add** button to set your departmental budget code as the Current value.

- Click on the **Schedule** button.

- The **History** window opens.

- While the report is running, you will see **Pending** displayed under the Status heading. When the report is complete, this will change to display **Success**.

**Note**: you may need to click the **Refresh** button to update Status.
2.2 View MFD Quarterly Report

- To view the report you have just run, click on its link under Instance Time heading. This will open the Crystal Report Viewer in a new window.

  **Note:** If you haven’t used the Crystal Report Viewer before, you may be prompted to install it. If so, click on Install.

- The MFD Billing Report is displayed in the Report Viewer.

  To expand the Preview, click on the + symbol. From the resulting list, you can click on any userid and the display will jump to that user’s entry in the report.

  Use the tool bar at the top of the Report Viewer window to **print** the report, or to **export** it to a different file format: xls, doc, rtf, pdf.

  From this toolbar, you can also scroll back and forward through the report pages, or search for a user by name.

  When you are finished, click once on the  symbol on the top right to close the Report Viewer window.

  Close the History window in the same way.

  Log out of Crystal Reports by clicking on the Logoff button.

2.3 Run MFD Date Range Report

Follow the instructions in Section 1 to login to Crystal Reports if you haven’t already done so, or if you have logged out.

- To run, click once on MFD Date Range Report (budget code and date parameters required) and select Schedule from the pop-up menu.

- In the Schedule window, under Customize your options, select Parameters from the drop-down menu.
− Under **Start date**, click on calendar icon 🕒 and select the date you want your report to start at from the pop-up calendar.
− Click on the **Add** button to set this date as the Current value.

![Schedule]

− Under **End date**, click on calendar icon 🕒 and select the date you want your report to end at from the pop-up calendar.
− Click on the **Add** button to set this date as the Current value.
− Under **Billing Code**, enter your departmental budget code in the **New value** text field.
− Click on the **Add** button to set this as the billing code.
− Click on the **Schedule** button.
− The **History** window opens.

![History]

− While the report is running, you will see **Pending** displayed under the Status heading. When the report is complete, this will change to display **Success**.

**Note:** you may need to click the **Refresh** button to update Status.

### 2.4 View MFD Date Range Report

− To view the report, follow the instructions in section 2.2 above.

**Note:** Date range reports can only be calculated up to and including the previous day’s usage (i.e. reporting of the current day’s usage is not possible). If you enter today’s date for either Start or End Date you will end up with unexpected results.