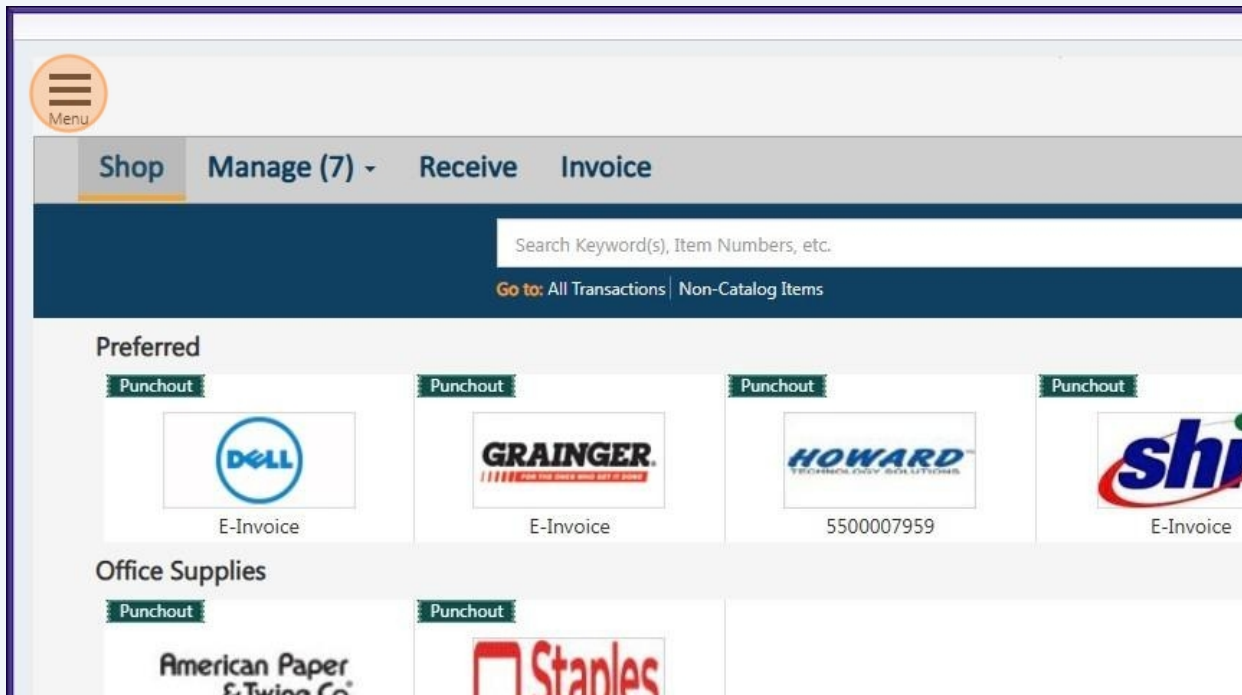
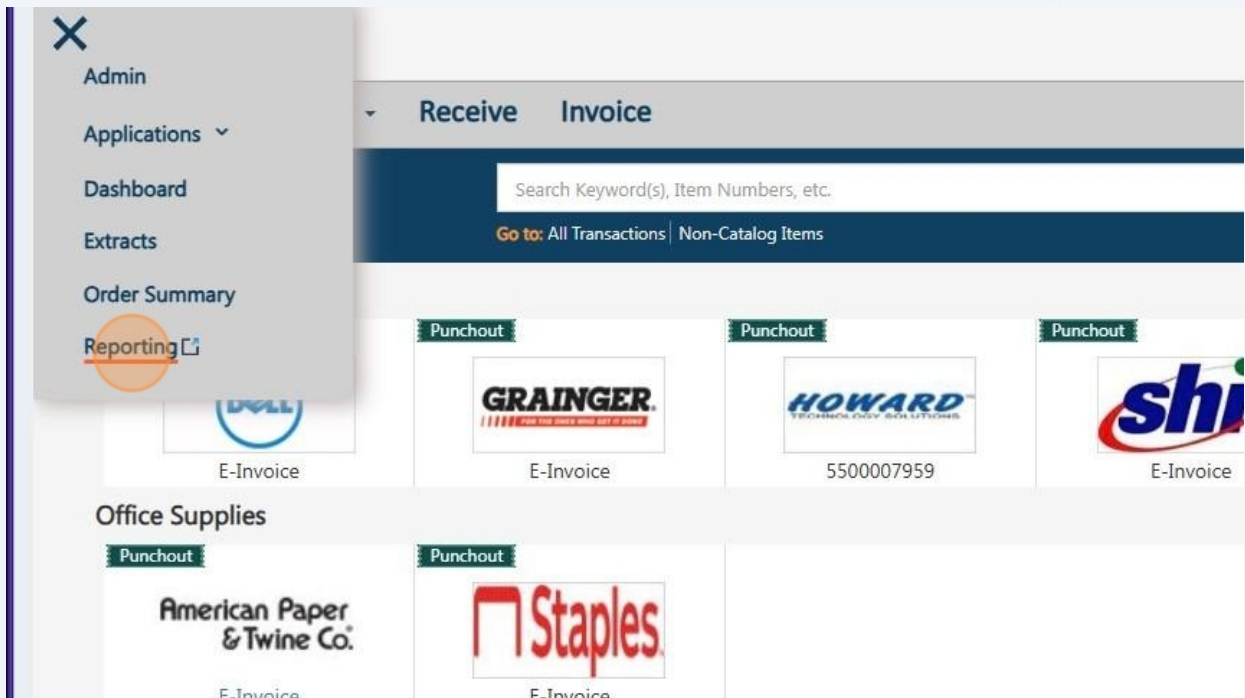


# ESM Reporting by Account & Fund Center

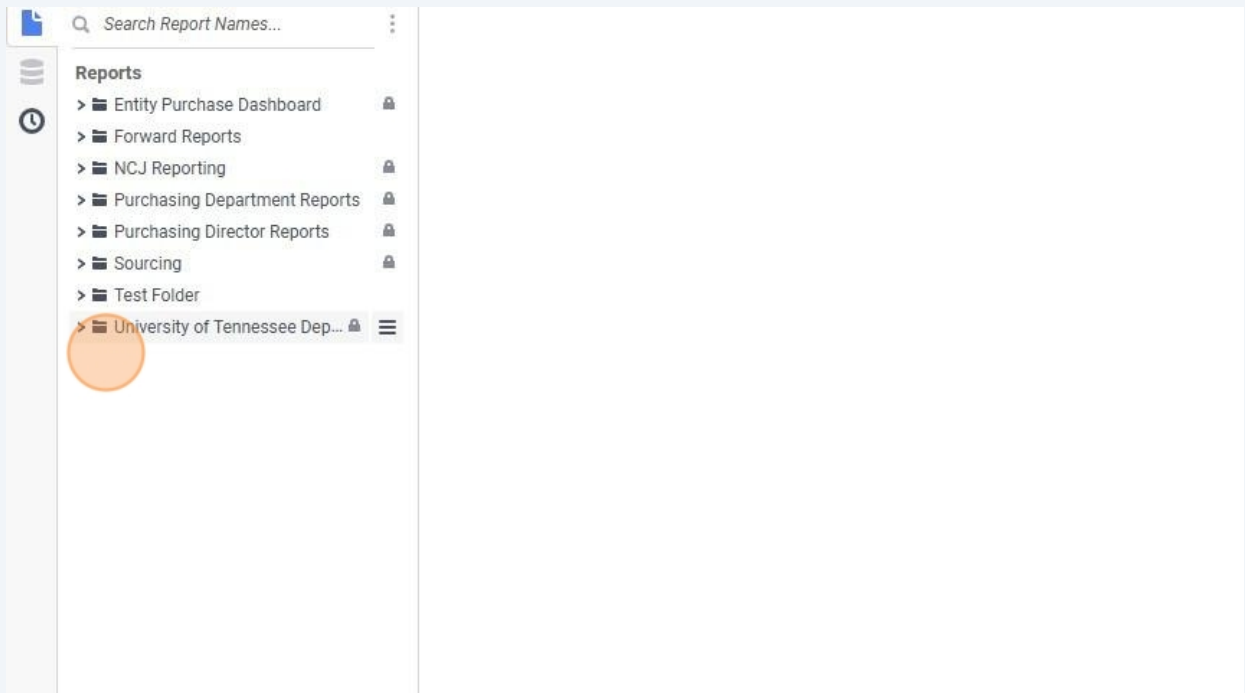
- 1 Go to ESM and click "Menu" in the top left corner



2 Click "Reporting"



3 Click "University of Tennessee Department Reports"

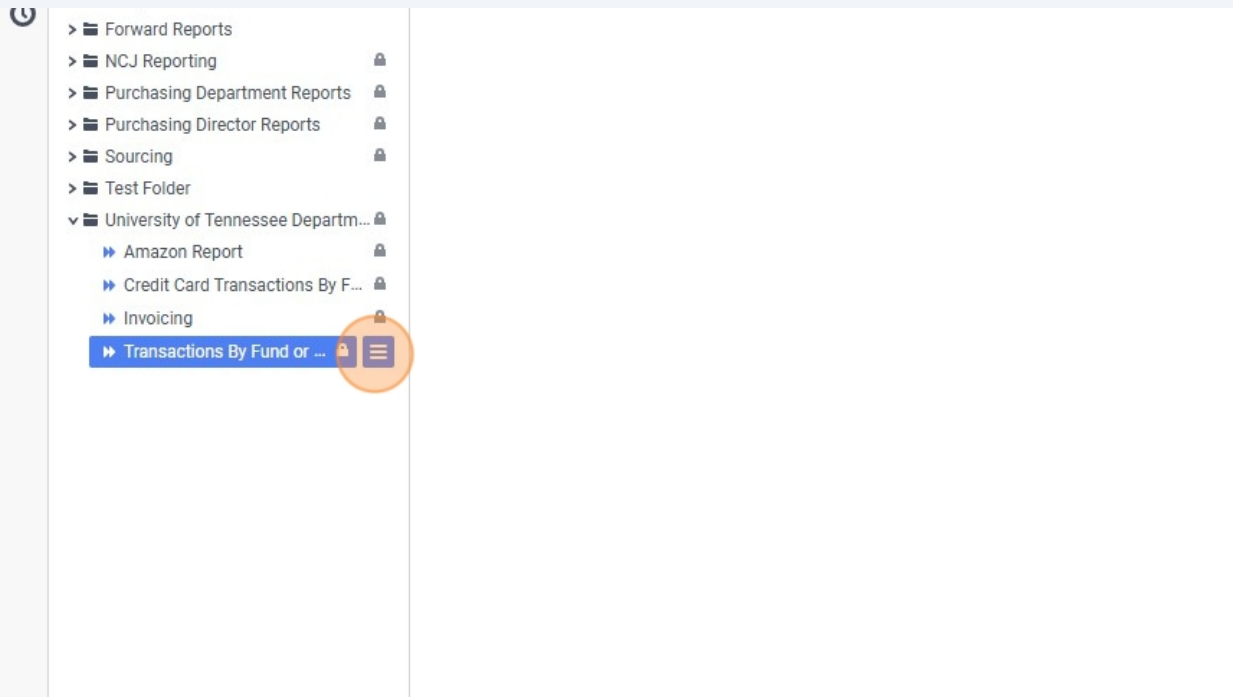




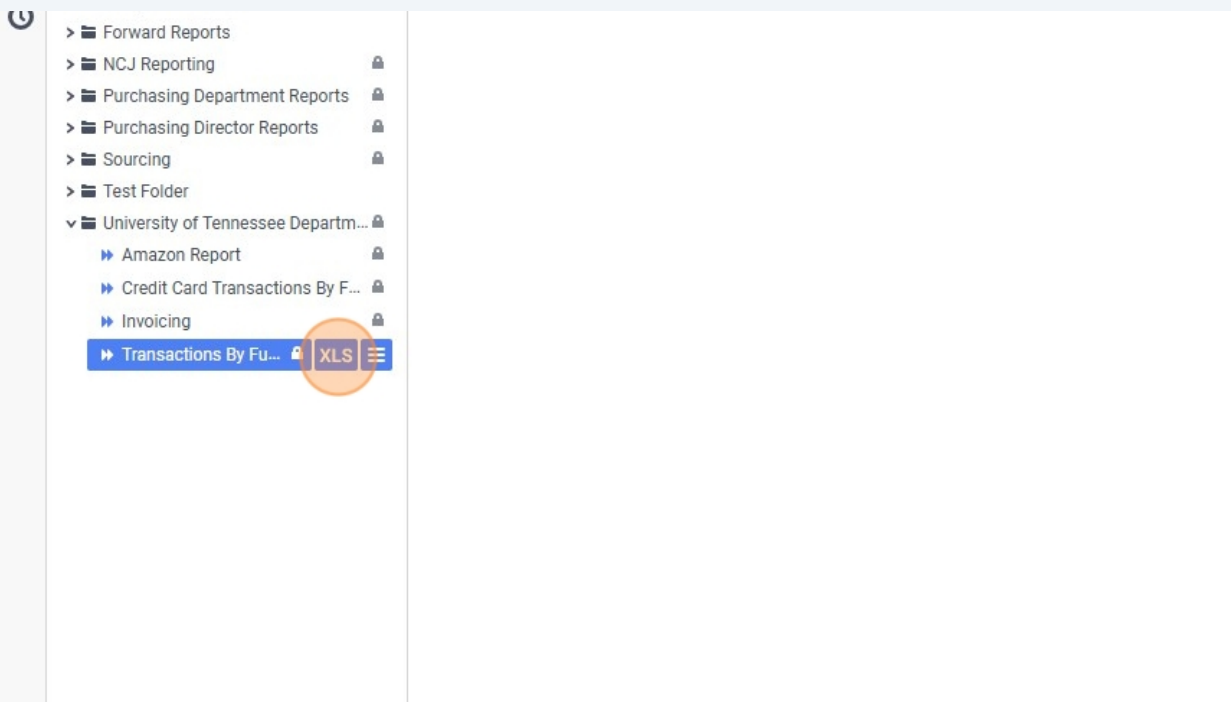
Alert! You may not see as many Report options on your screen based on your level of access, but all departments should have access to University of Tennessee Department Reports".

4

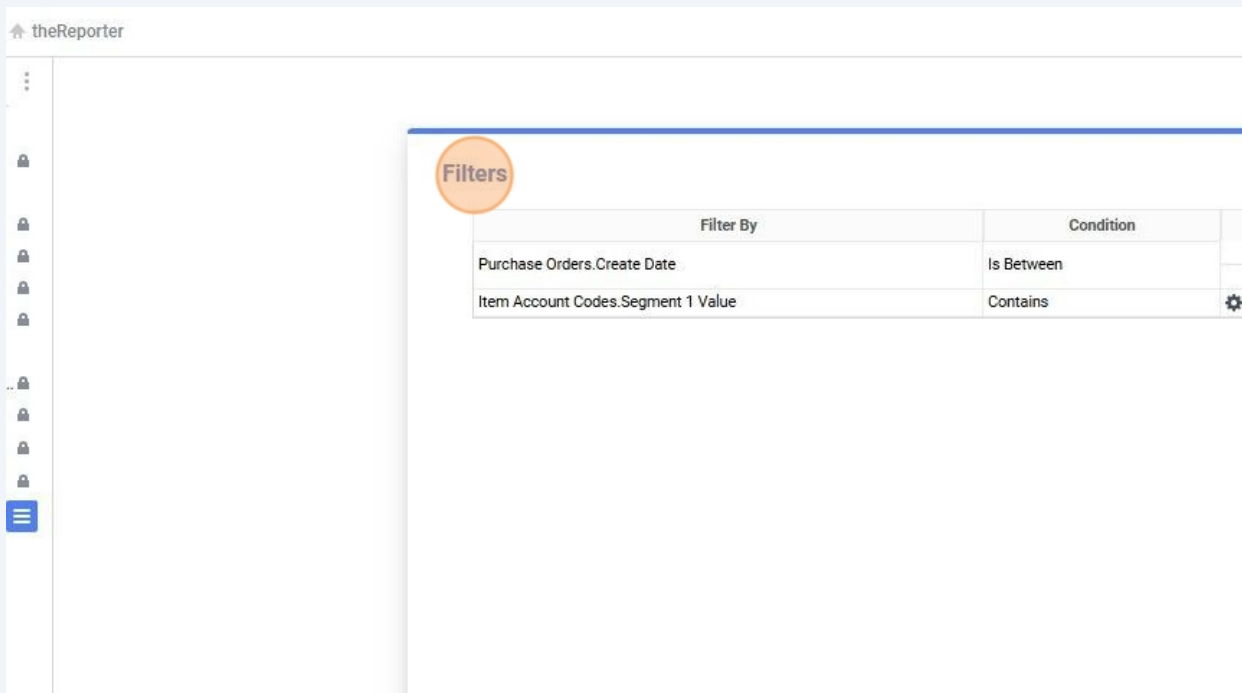
Click the "Menu" button. When you click the menu, a new XLS button will appear.



5 Click the "XLS" button.



6 A new pop-up box appears called "Filters"



7 Enter the date range for the report.

Transactions By Fund or ... | theReporter

### Filters

Filter By	Condition	
Purchase Orders.Create Date	Is Between	
Item Account Codes.Segment 1 Value	Contains	⚙️

8 Click the "Calendar" icon to select the start date or manually enter a start date using MM/DD/YYYY.

Value

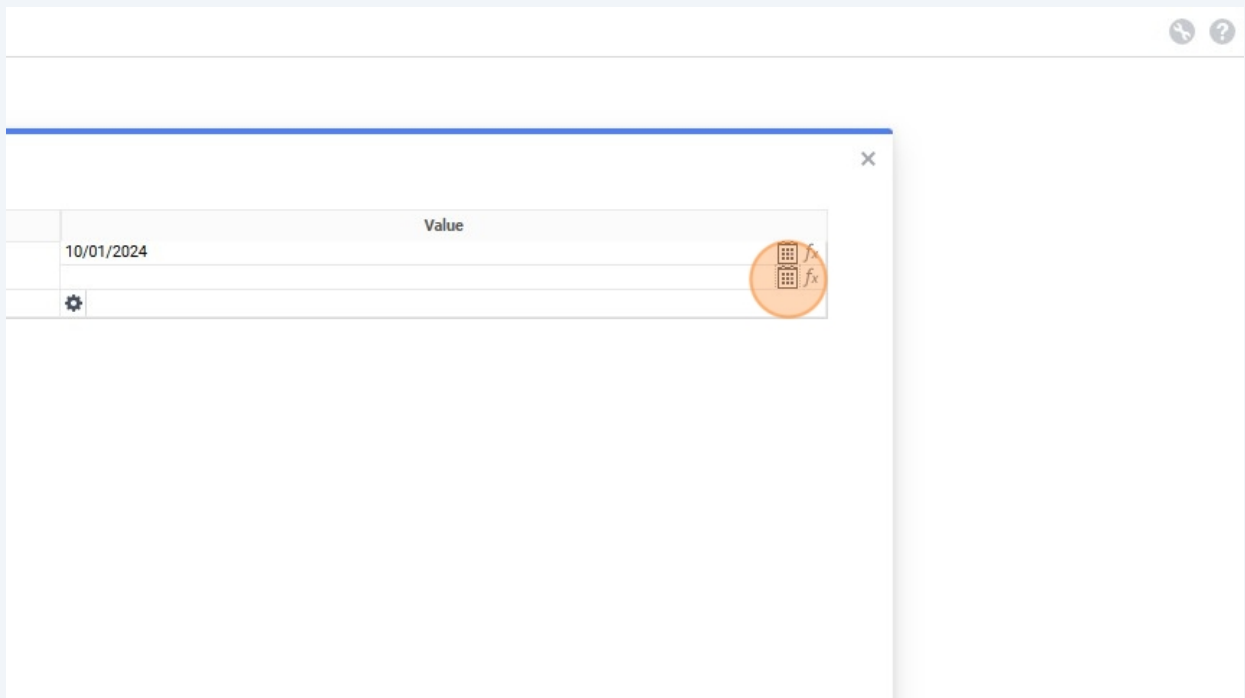
Enter in 'MM/dd/yyyy' sequence  
eg. 11/07/2024

< Nov 2024 >

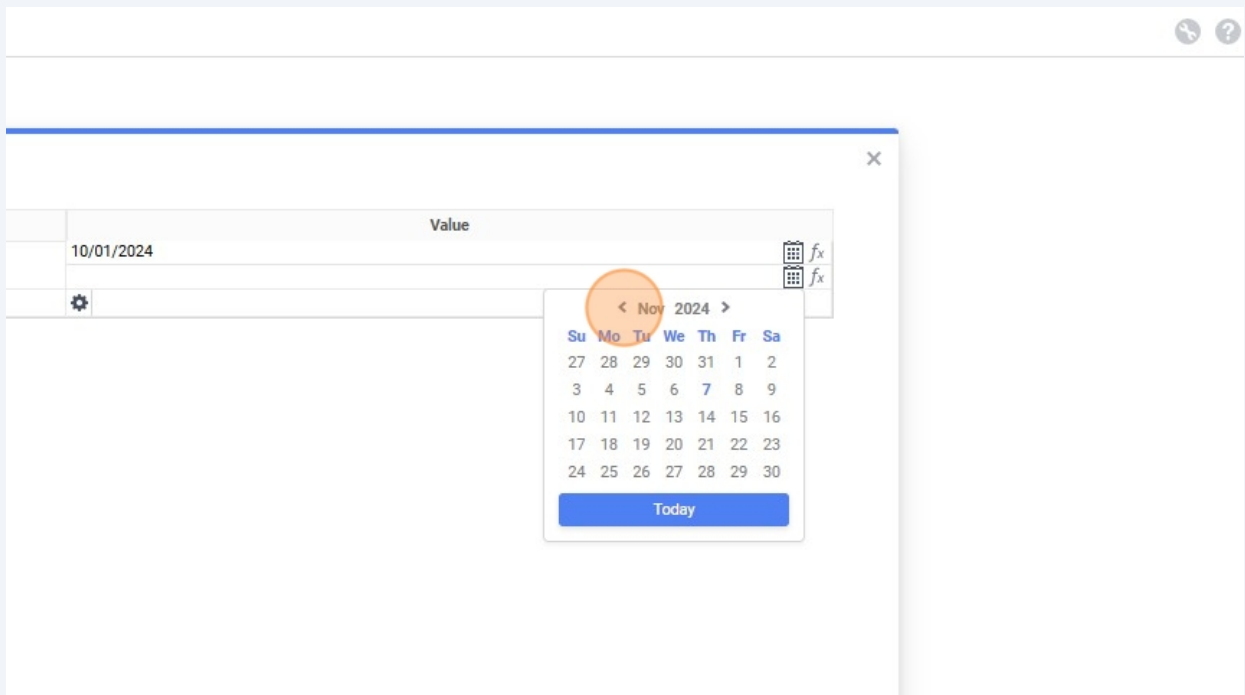
	We	Th	Fr	Sa			
	30	31	1	2			
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30

Today

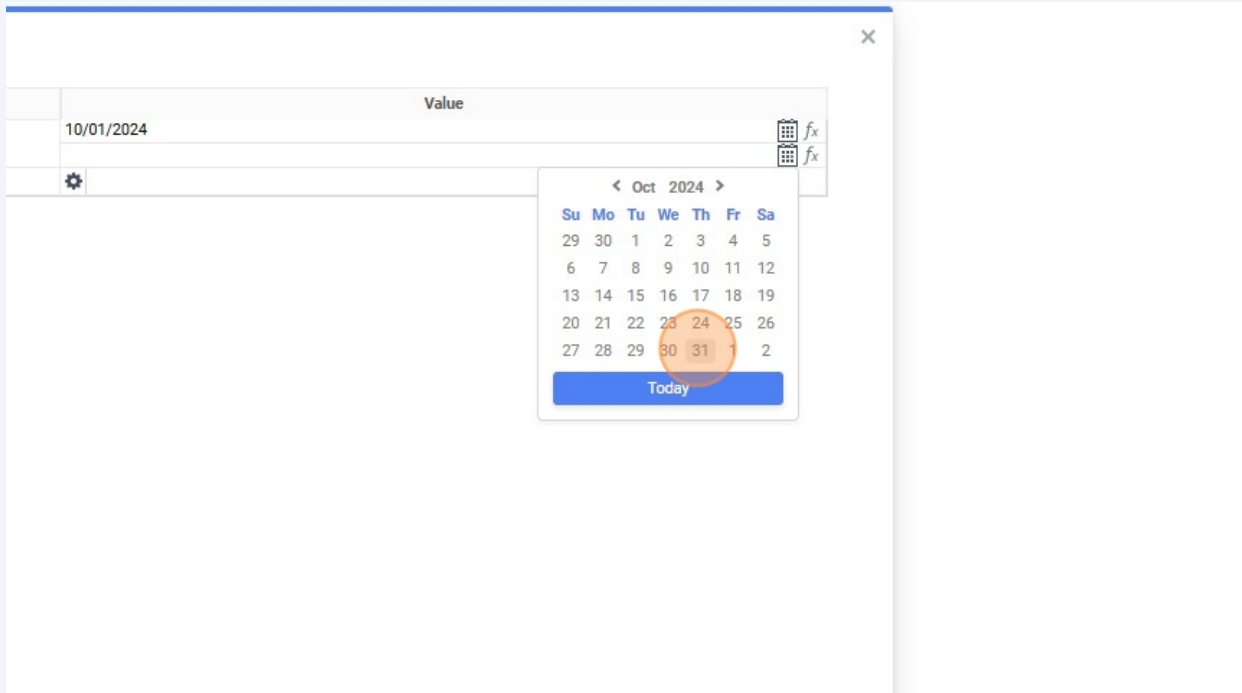
9 Click the second "Calendar" icon to select an end date.



10 Use the "< >" icons to select the Month.




**11** Click the Date to select the end date.



Alert! If a date range is too large, the report will crash. If the report won't download, try reducing the date range. Many reports start to crash when the date range exceeds a few months.

12


Click the field below and enter the E Account #, the U Account #, or to see a report with all E#'s or U#'s, enter either E17 or U17.

Filter By	Condition	Value
ie	Is Between	10/01/2024 10/31/2024
nt 1 Value	Contains	 E17

13

Confirm the start date, end date, and account # are correct and click "Okay"

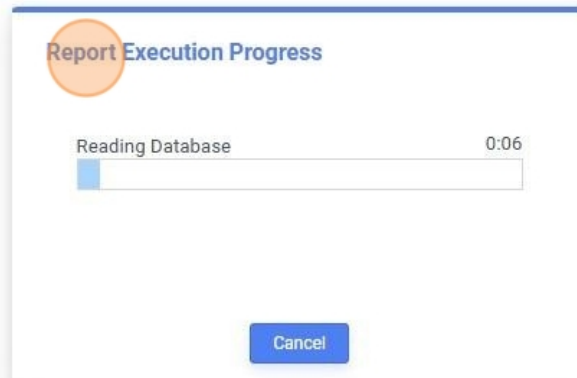
Filters

Filter By	Condition	Value
Purchase Orders.Create Date	Is Between	10/01/2024 10/31/2024
Item Account Codes.Segment 1 Value	Contains	 E17

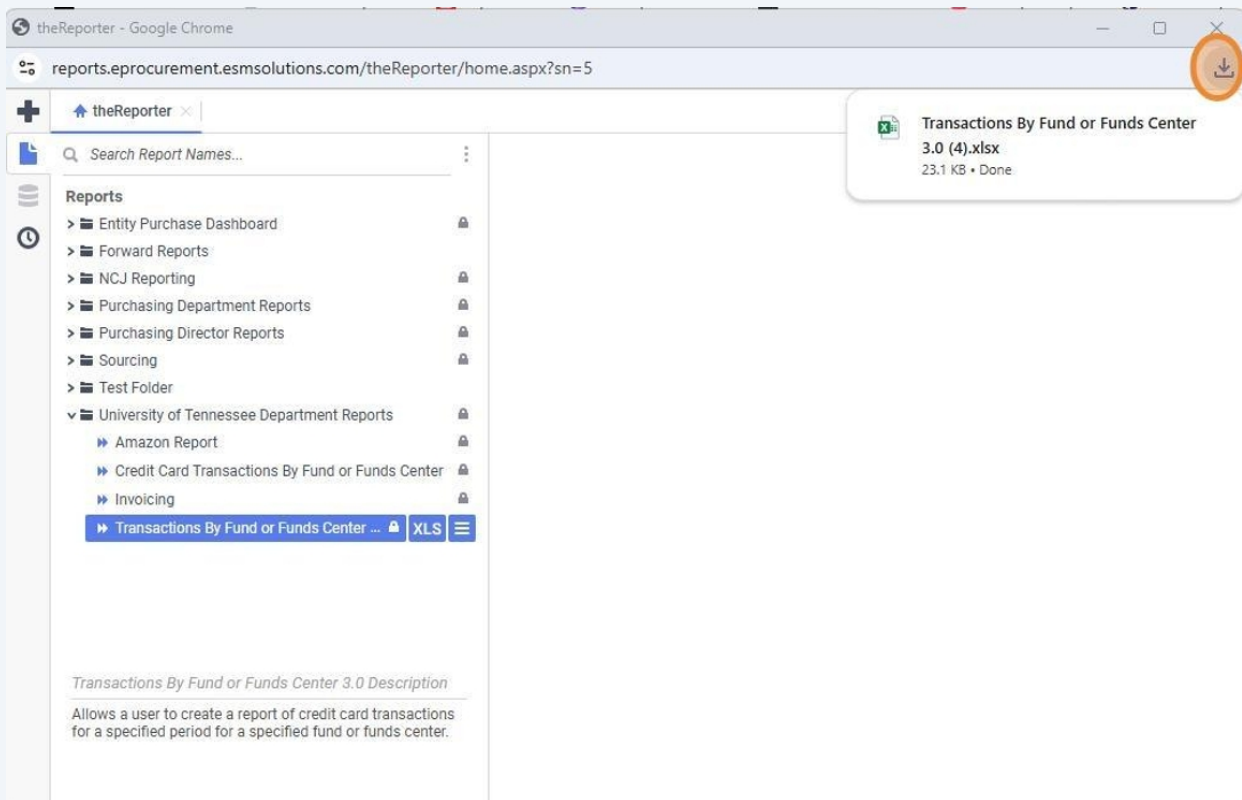
Okay Cancel



14 The "Report Execution Progress" bar will open and run the report.



15 When the report is complete, it will appear in the "Downloads" folder. Click the "Download" icon or click the report.



**16**

Repeat the steps above for each E Account # and/or U Account #, or run the report to see all E#'s & U#'s using E17 or U17.