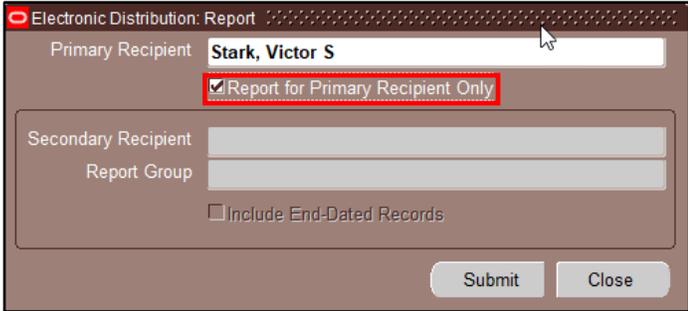**FINANCIAL AFFAIRS**
The University of Alabama at Birmingham

Creating a Report of Electronic Distributions
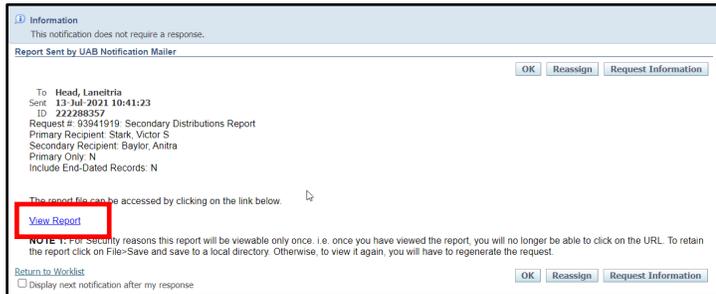
⚠️	As of July 17, 2021, the Electronic Distribution Form is available in **view-only** mode. No updates can be made to this form. Primary and secondary recipients will no longer automatically receive month-end reports as of this date.
1. Click on the **Report** button found at the bottom left-hand corner of the form. The **Electronic Distribution: Report** form will appear.	
2. Select the name of the desired primary recipient by either entering their name (last name first), or by performing a search through the List of Values (LOV) button in the **Primary Recipient** field.	
	To Run a Report for the Primary Recipient Only:
3. Check the **Report for Primary Recipient Only** box. The fields related to the Secondary Recipient will become inactive.	
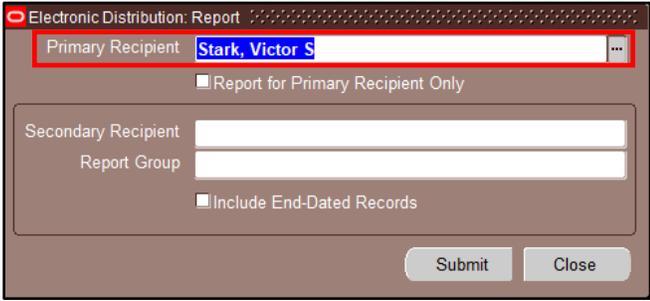
	To Run a Report for a Specific Secondary Recipient:
4. Leave the **Report for Primary Recipient Only** box unchecked. Enter the name of the recipient (last name first), **or** search for the individual by clicking on the List of Values (LOV) button in the **Secondary Recipient** field.	**Electronic Distribution: Report** Primary Recipient: **Stark, Victor S** ☐ Report for Primary Recipient Only Secondary Recipient: **Baylor, Anitra** … Report Group: ☐ Include End-Dated Records Submit Close
	To Run a Report for All Secondary Recipients:
5. To run a report listing for all Secondary Recipients related to the Primary Recipient, leave the **Report for Primary Recipient Only** and the **Secondary Recipient** fields blank. 6. After entering your criteria, click the **Submit** button.	**Electronic Distribution: Report** Primary Recipient: **Stark, Victor S** … ☐ Report for Primary Recipient Only Secondary Recipient: Report Group: ☐ Include End-Dated Records Submit Close
7. A notification will appear explaining that the report has been sent to your personal worklist and will display the request id number. Click the **OK** button to close the notification.	**Note** ✕ You should receive a workflow notification with the report attachment after some time. If you do not receive a workflow notification, please report the problem with request id 93941919. OK
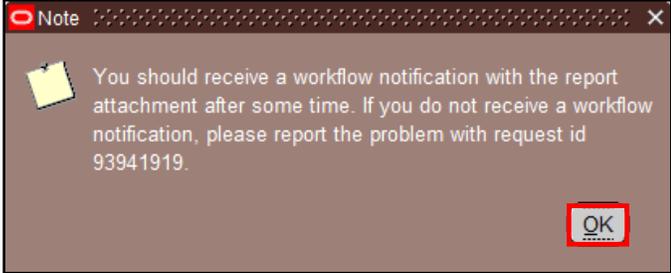
8. To access the report, go to your **Personal Worklist** in Oracle. 9. Locate the workflow notification by the date the report was submitted. Click on the link to open.	
10. The notification will include the Request ID number, Primary Recipient, and Report Name for which the report was run. Click on the **View Report** link to open the result. **Important Note!!** **The report can only be viewed once**. Once the **View Report** link has been accessed, any other attempts to open the link will receive an Authentication Error message. In order to access the report multiple times, it is necessary to save the report to your computer before closing it.	
11. After the file downloads, click on it to open it in Excel. Once the document opens, the report can be edited and saved as desired.	