

Running Reports

Overview

Run reports to extract information from NIS. A number of reports are available in each of the different modules (Accounts Payable, Fixed Assets, etc.). This work instruction provides examples of how reports are generally run in NIS. Please refer to the Reports section of the work instructions for each module to review step-by-step instructions for running specific reports.

When you run an NIS report, it may:

- Display a series of data windows for you to complete before running the report including Data Selection, Data Sequencing, and/or Processing Options, or
- Run automatically without requiring data selection (report criteria). In these cases, this instruction does not apply.

This work instruction shows how to:

[Select a Report Version](#)

[Enter Data Selections](#)

[Enter Data Sequencing Information](#)

[Enter Processing Options](#)

[Submit a Report for Processing](#) (Printer Selection window)

Navigation

 This navigation is used to illustrate the example in this work instruction. The navigation for specific reports can be found in the Training Manuals.

Click Roles, Address Book.

(Citrix users – right click on the menu, choose View by Role, choose Address Book.)

Address Book > State Accounting Central Maint > Address Book Reports > Reports by Address

Steps

Select a Report Version

Most reports will begin at the Version Prompting window. However some reports require you to choose a report version. Follow the steps below if the report you are running requires you to choose a report version.

Start this instruction from the Work with Batch Versions – Available Versions window.

Version	Version Title	Web Only	User	Last Modified	Security	Description
<input type="checkbox"/> AUDIT01	Version for Production Audit		NISBDRAHO1	06/18/2002	0	No Security
<input type="checkbox"/> IBM001	One line per address		RBRIGHT	05/30/2002	0	No Security
<input type="checkbox"/> NE014021	test		TROBERT	05/24/2002	0	No Security
<input type="checkbox"/> NE550001	Jessica's Version - DELETE ME		JJONES	05/02/2002	0	No Security
<input type="checkbox"/> NE9990001	One Line Per Address		UATRJONES9	11/14/2005	0	No Security
<input type="checkbox"/> NIS0001	Special Report- DELETE ME		JJONES	04/09/2002	0	No Security
<input type="checkbox"/> NIS0001A	Sample		NISMWILHEL	06/10/2002	0	No Security
<input type="checkbox"/> NIS0001B	Sample		TN999COR	06/13/2002	0	No Security
<input type="checkbox"/> OMMW0RIG	Ommw orig		OMWTEST	08/01/2002	0	No Security
<input type="checkbox"/> SAMPLE	Sample		TREID	11/29/2001	0	No Security

- Choose the row with the appropriate version
 - In this example, version NE9990001 is used.
 - If the list of versions is long, you can use the QBE line to limit your search, or you can view the next set of versions by clicking the **Next** arrow.
- Click **Select** to display the Version Prompting window.

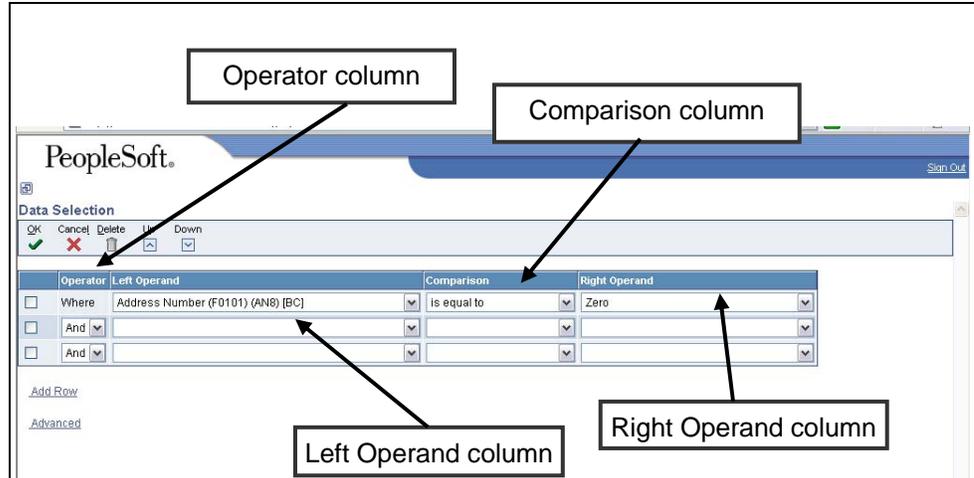
Enter Data Selections

Most reports will begin at the Version Prompting window (after choosing the report from the menu). Continue this instruction from the Version Prompting window.

- Select the following check boxes:
 - Data Selection** – Displays the Data Selection window, where you specify the search criteria for the report.
 - Data Sequencing** – Displays the Data Sequencing window, where you specify the sort order for the report data.

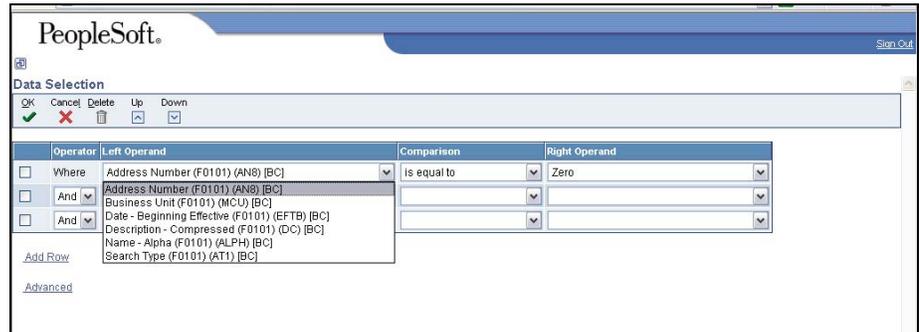
You can select one or neither, depending on whether you want to adjust the search criteria, adjust the order in which the data is displayed, or accept the system defaults.

Data selections control which fields or search criteria the report uses for its data. The Data Selection window may already contain default specifications. To remove a data selection, choose the row in the grid, and then click **Delete** to remove the selected row. Any changes you make here will *not* change the default settings for this report version.



✏ If "[PO]" appears in the Right Operand field for Data Selection, information for that report criteria will be entered on the Processing Options window.

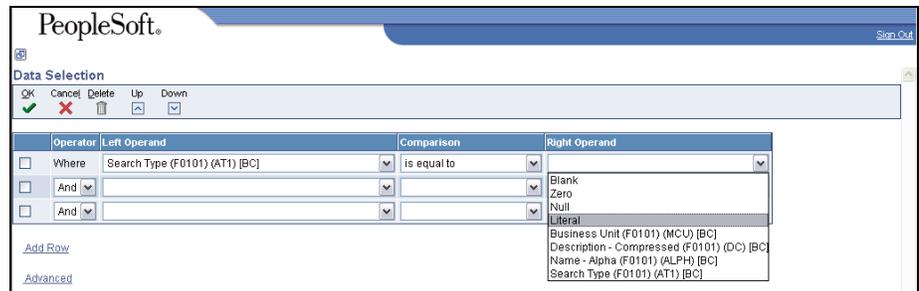
2. In the first row, click the **Left Operand** down arrow.



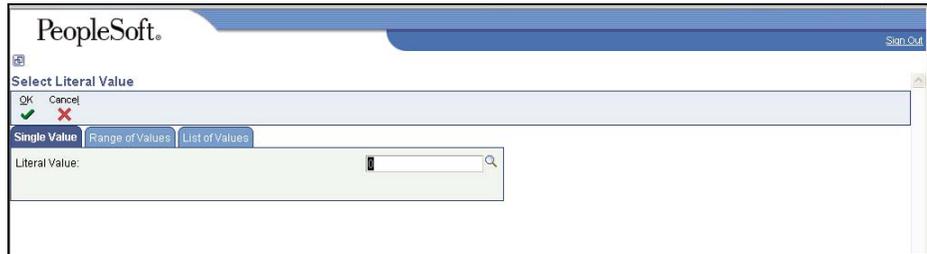
3. Click **Search Type [F0101] [BC]**.

✏ In this example, the Left Operands are the fields in the NIS grid and the Right Operands are the valid values. In all cases, the Operators – And, Or – and the Comparisons – is greater than, is less than, is equal to, is not equal to, is greater than or equal to, and is less than or equal to – define the search logic.

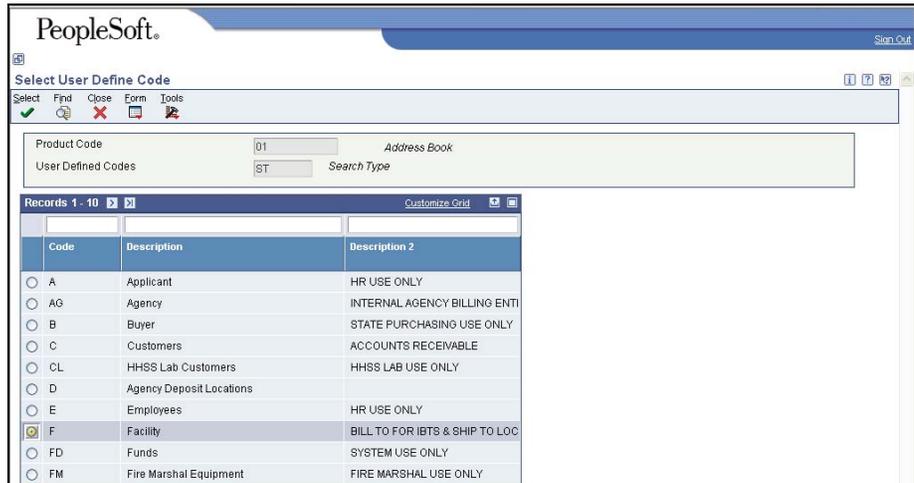
4. In the first row, click the **Right Operand** down arrow.



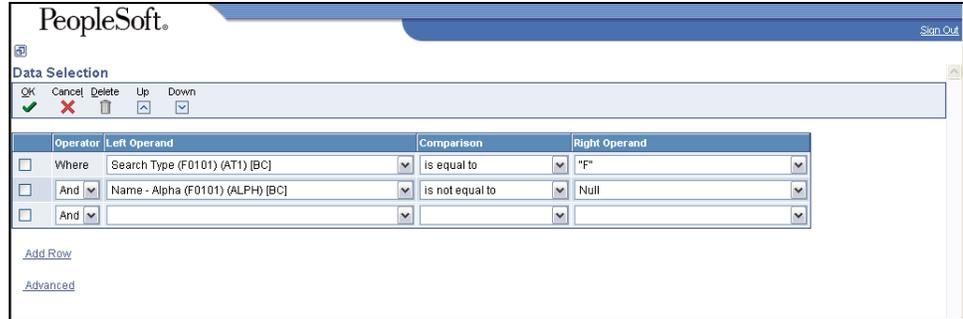
5. Click **Literal**. The Select Literal Value window appears.
 -  Literal is the most frequently used Right Operand.
 -  The Select Literal Value window consists of three tabs:
 - Single Value – to enter only one value
 - Range of Values – to enter a beginning value and an ending value
 - List of Values – to enter many values
 -  Single Value, the default, is the most widely used and most widely available. Some reports do not offer ranges or lists. In this exercise, we use Single Value.
6. Click the **Visual Assist**. The Select User Define Code window appears.



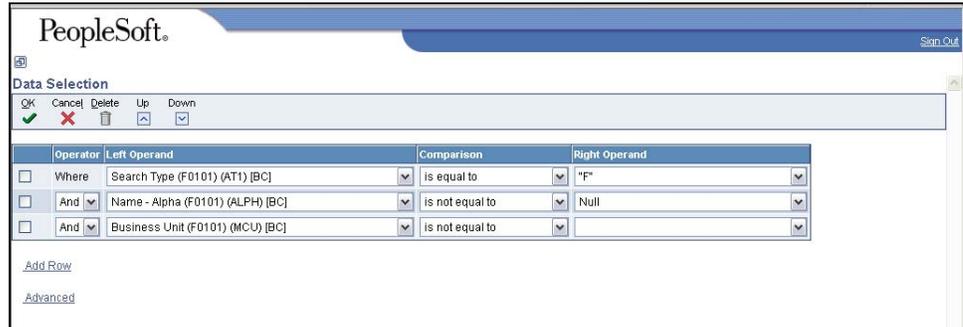
7. Choose the row for which the Code field value is **F** (for Facility).



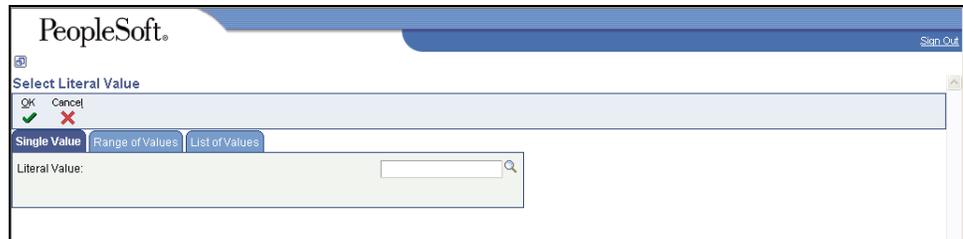
8. Click **Select** to return to the Select Literal Value window.
9. Click **OK** to return to the Data Selection window.
10. In the second row of Data Selection window, use the pull down menus to set **Name – Alpha [F0101] [BC]** as the Left Operand, **is not equal to** as the Comparison, and **Null** as the Right Operand.



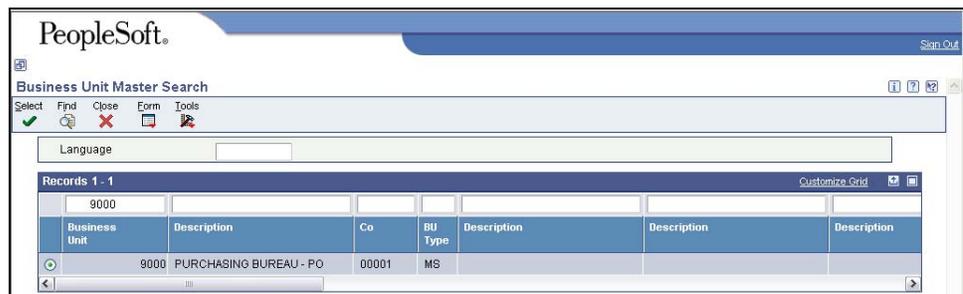
- In the third row of Data Selection window, use the pull down menus to set **Business Unit [F0101] [BC]** as the Left Operand and **is not equal to** as the Comparison.



- In the third row of Data Selection window, use the pull down menus to set **Literal** as the Right Operand.



- At the Select Literal Value window, click the **Visual Assist**.
- At the Business Unit Master Search window, type **9000** in the Business Unit field at the QBE line.
- Click **Find**.



- Verify that one row is displayed, and **PURCHASING BUREAU - PO** appears in the description field.
- Click **Select**.

17. Click **OK**.

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/> Where	Search Type (F0101) (AT1) [BC]	is equal to	"F"
<input type="checkbox"/> And	Name - Alpha (F0101) (ALPH) [BC]	is not equal to	Null
<input checked="" type="checkbox"/> And	Business Unit (F0101) (MCU) [BC]	is not equal to	"9000"
<input type="checkbox"/> And			

18. At the Data Selection window, choose the **third row** – the one that has **Business Unit** as the Left Operand.

19. Click the **Up** arrow.

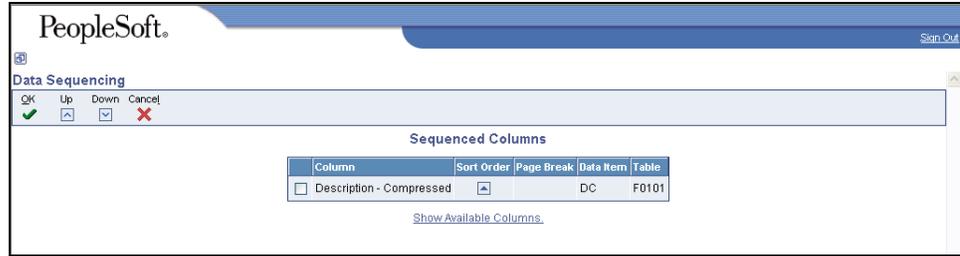
20. Verify that the row with **Business Unit** as the Left Operand is now the *second row*.

 Moving the Business Unit row up tells the system to search for data first by Search Type, then by Business Unit, and lastly by Name-Alpha.

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/> Where	Search Type (F0101) (AT1) [BC]	is equal to	"F"
<input checked="" type="checkbox"/> And	Business Unit (F0101) (MCU) [BC]	is not equal to	"9000"
<input type="checkbox"/> And	Name - Alpha (F0101) (ALPH) [BC]	is not equal to	Null
<input type="checkbox"/> And			

21. Click **OK** to display the Data Sequencing window.

 If the Data Sequencing box was not checked on the Version Prompting window, either the Processing Options or Printer Selection window will appear. (The window that appears will depend on which reports is being run.)



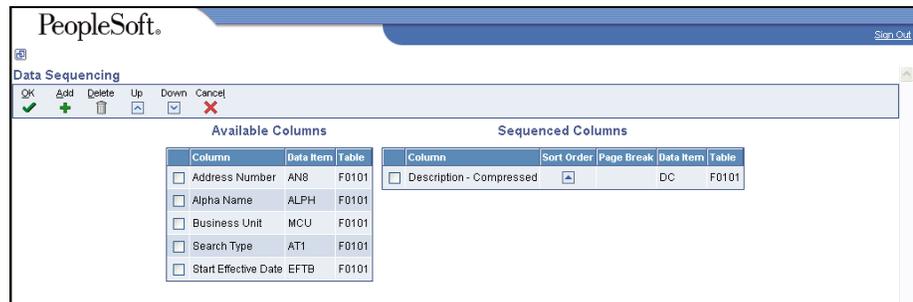
Enter Data Sequencing Information

Sequence your data to control how the data is sorted on the printed report.

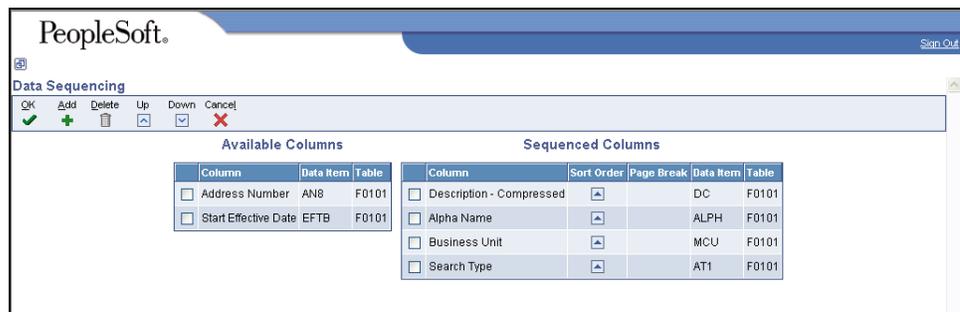
-  Do not change your data sequencing unless it is necessary.
-  Changes you make here will *not* change the default settings for this report version.

Continue this instruction from the Data Sequencing window. The first view of this window will show only the Sequenced Columns list.

1. To view other columns available, click **Show Available Columns** at bottom.



2. At the Available Columns grid, choose **Alpha Name, Business Unit** and **Search Type**.
3. Click **Add**.



4. Verify that Alpha Name, Business Unit and Search Type move to the Sequenced Columns grid. In this example, the report will be sequenced first by Description, then Alpha Name, then Business Unit, and lastly, Search Type.
-  Choose a row in Sequenced Columns and click the Up or Down arrow on the toolbar to change the order in which the columns will be sequenced.
 -  Do not assume that the columns listed under Sequenced columns will appear as columns on the printed report.

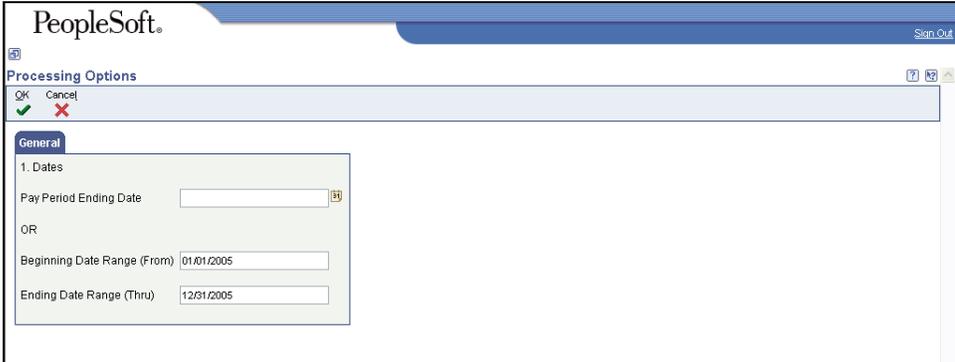
-  Click the arrow in the Sort Order column to sequence the column in descending order instead of ascending order. (Down arrow will sequence in descending order, up arrow will sequence in ascending order.)
- 5. Click OK. The Processing Options window appears.
-  If the report being run does not require processing options, the Printer Selection window will appear.

Enter Processing Options

Some reports require Processing Options. Use processing options to further narrow the report information.

-  The tab names and fields on the Processing Options window are different for each report, based on the report's function. Any changes you make to processing options will change the default settings for this report version the next time anyone runs it. Make sure you check the processing options each time you run a report.

Continue this instruction from the Processing Options window.



1. Change the values in each field, as needed.
2. If there are multiple tabs, click the subsequent tab(s) to enter information.
3. Click **OK**. The Printer Selection window appears.

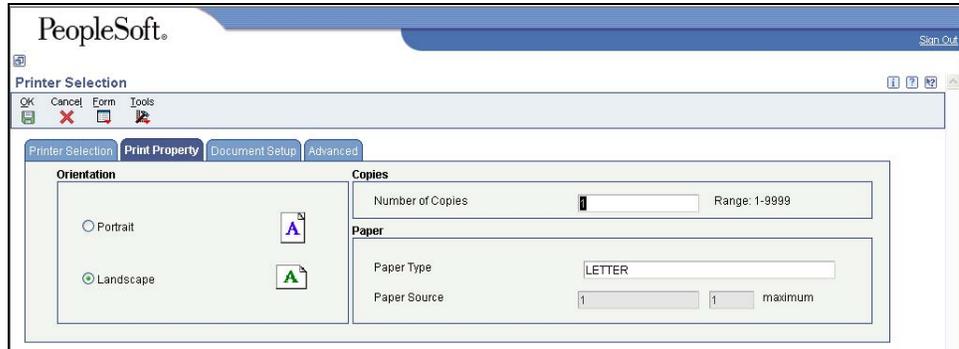
Submit Report for Processing

Start this instruction from the Printer Selection window.



 There are four tabs of information available to you. The first tab (Printer Selection) pertains to where the report will be output.

The second tab (Print Properties) allows you to set the orientation of your report (portrait or landscape).



The third tab (Document Setup) allows you to choose your print output options:



To generate the report in a comma-delimited format that is readable by Microsoft Excel, select the **CSV (Comma Delimited)** check box on the **Document Setup** tab. After the report finishes running, you can view the report in Microsoft Excel. See *Working with Submitted Reports*.

 Not all reports are available in CSV format.

The fourth tab (Advanced) is the Printer Definition Language and should be left defaulted to PCL:



4. Click **OK** to submit the report to the print queue, and to display the Work with Batch Versions – Available Versions window. Your report should print on the designated printer.

-  Your report is sent to the server “queue” where it will be processed in the order it was received. The time it takes for your report to process will depend on a couple of things: the length of the report you are trying to run, the amount of other reports in the queue, etc.