

IFAS Reports



Participant's Manual

Version 1.0

December, 2010

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General Overview

Introduction

This class includes explanations and activities designed to teach important report topics. Please feel free to ask questions at any time.

Goals

The following are the goals for today:

- To understand the different types of reports provided by IFAS
 - To navigate through IFAS reports
 - To describe how to export a CDD report to Excel
-

Reports

Introduction

IFAS includes two types of reports:

- CDD (Click, Drag and Drill)
 - Standard Reports
-

Objectives

The following objectives are covered in this section:

- Open and run a CDD report.
 - Describe the procedure for exporting a CDD report to Excel.
 - Describe Standard Reports and how to run them.
-

CDD Reports

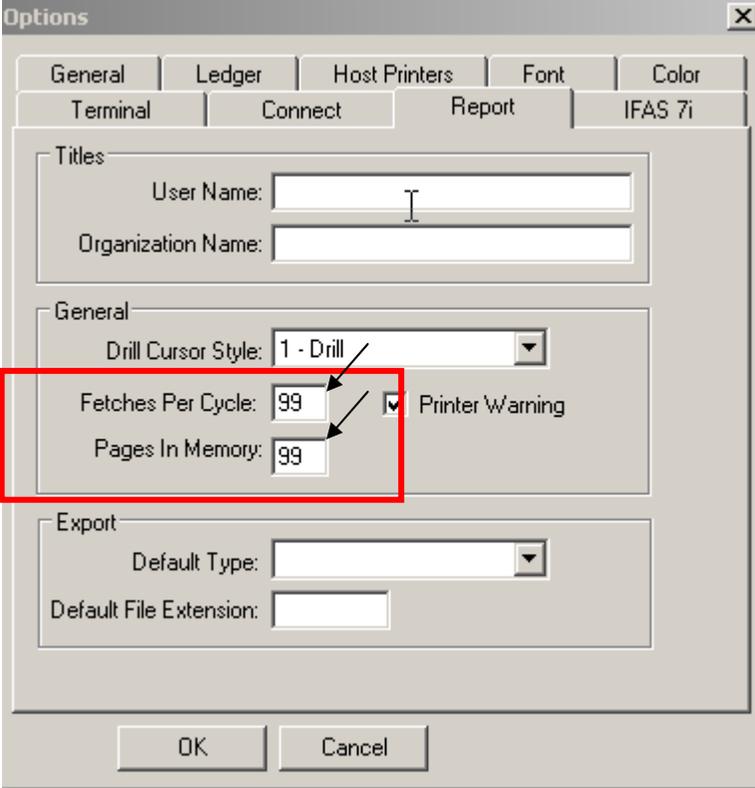
Introduction CDD reports are named for the Click, Drag, and Drill features. To access these reports, either click the blue Running Man icon  on the toolbar or choose CDD reports at the end of the Menu Tree. A listing of reports will appear from which you select. Click the plus (+) sign in front of the title to open the exact report you want.

Some reports have more than one version, with different information, prompts, and selection criteria.

CDD Reports continued

Initial Setup

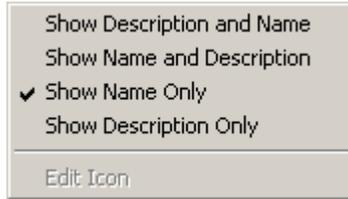
Before launching a report, it is necessary to set the Report tab in the Options menu. Follow this procedure once to set up reports.

Step	Action
1	<p>Click Edit > Options in the menu bar. The following Options box displays.</p>  <p>The screenshot shows the 'Options' dialog box with the 'Report' tab selected. The 'General' section contains the following fields: 'Drill Cursor Style' (set to '1 - Drill'), 'Fetches Per Cycle' (set to '99'), 'Pages In Memory' (set to '99'), and a checked 'Printer Warning' checkbox. The 'Export' section contains 'Default Type' and 'Default File Extension' fields. The 'Fetches Per Cycle' and 'Pages In Memory' fields are highlighted with a red box, and arrows point to them from the text above.</p>
2	Click the Report tab.
3	In the General section of the Report tab, type 99 in the Fetches per Cycle space. This allows the report to run faster.
4	<p>Change the Pages in Memory setting to 99, the maximum.</p> <p>Note: The default for Pages in Memory is 30. This means that you are seeing only 30 pages of the report at a time. If you skip to the end of the report, you will see only the last 30 pages, causing you to lose the pages at the beginning. The number of pages in memory is the number of pages you see on screen. If you have lost pages, re-run the report.</p>

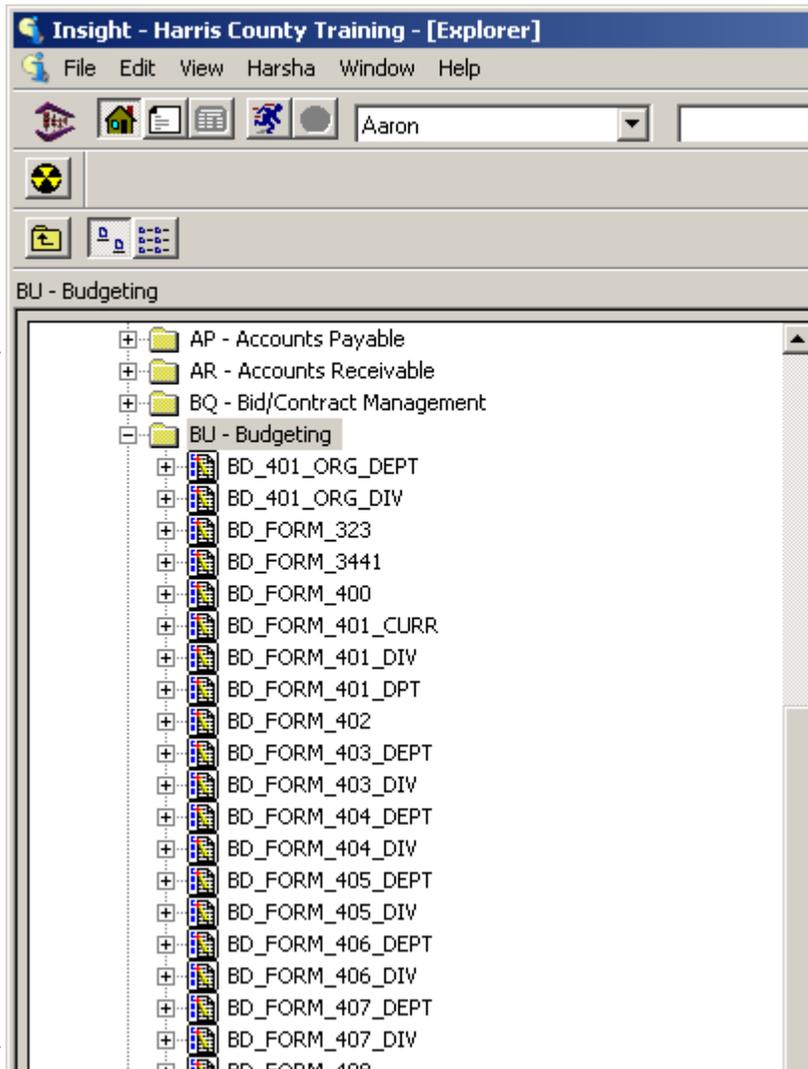
CDD Reports continued

Viewing Report Titles

If you want to change the way the reports are listed, right click in any *white* area of the listing. This popup box displays. Reports are shown with name only, as depicted below.



Right click anywhere in the white space to change the display.

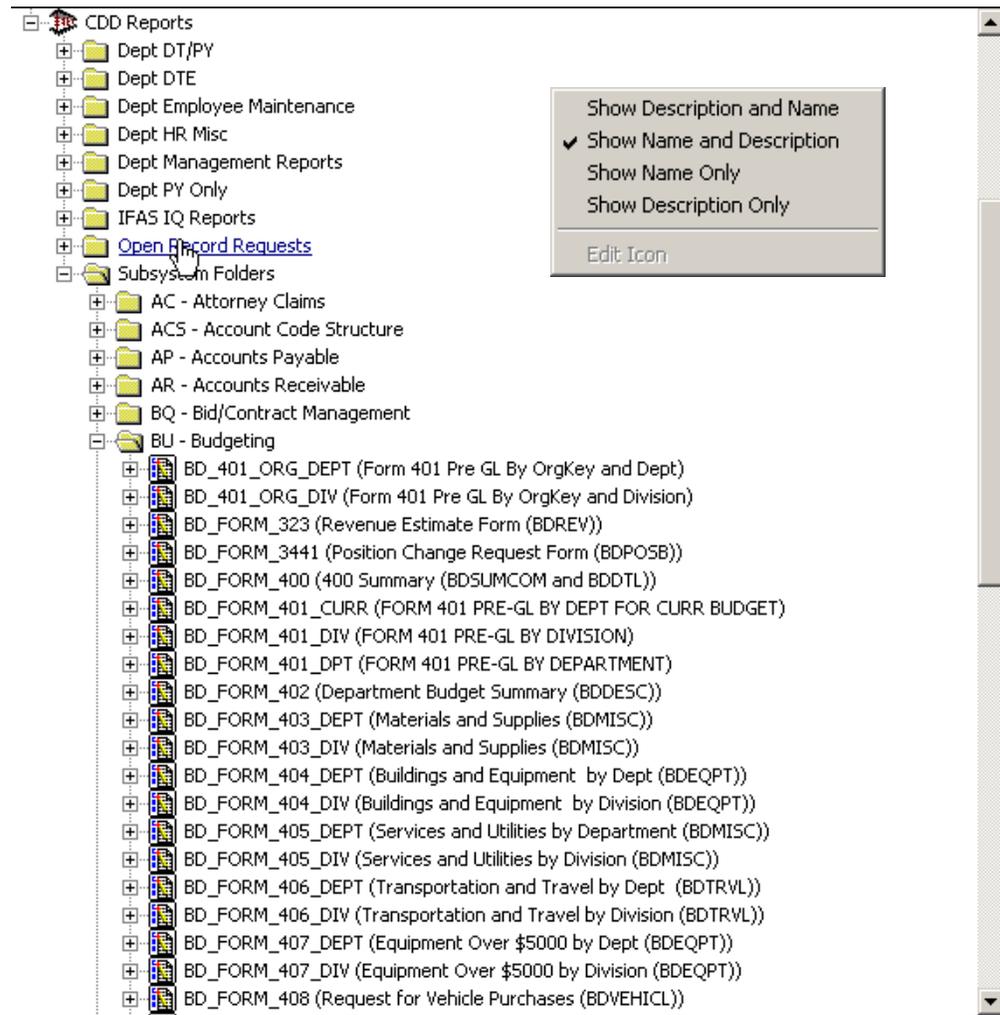


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CDD Reports, Continued

Viewing Report Titles (continued)

To display reports by name and description, click Show Name and Description in the popup box, as depicted below.

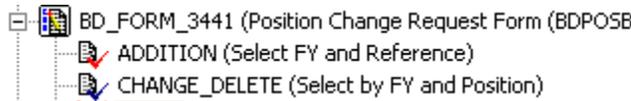


Note: The screen above lists names and descriptions for each Budget report. This is the recommended listing. If the user needs to contact the ITC Help Desk about a CDD report, they will be asked to provide the name of the report. It should be given with the name and description.

Running the CDD Report

How to select a report

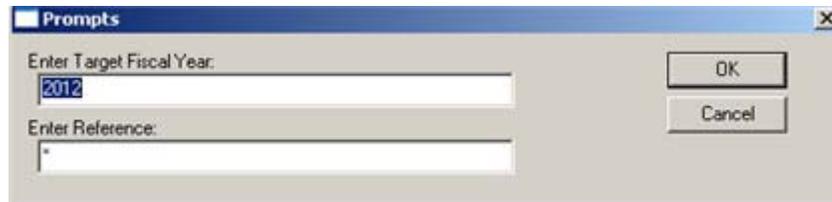
From the listing in the CDD report tree, you can choose a report by double-clicking the title of the report. In some cases, you will find variations of the report listed when the title is expanded. To expand the report, click the plus (+) sign that appears before the title. The plus (+) sign changes to a minus (-) sign. Choose the variation desired by double-clicking it. See the example below.



The variations of BD_FORM_3441 are ADDITION and CHANGE_DELETE. You would choose the variation desired. If, however, you double-click the title, you would bring up the first listed variation. In this case, ADDITION would be selected by double-clicking BD_FORM_3441.

Selection Criteria

After choosing the report, a selection criteria box displays. Here is where you limit your search for data. The selection criteria box for the above ADDITION report for BD_FORM_3441 follows:



For this search, only fiscal year 2012 is included. The Reference field is for a number assigned to the record by the system.

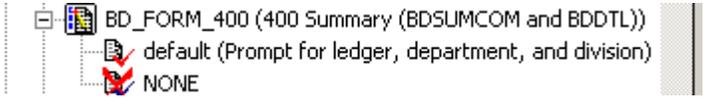
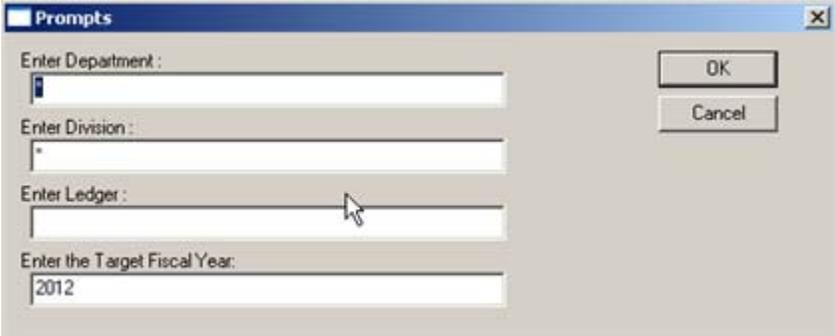
Note: The **wildcard symbol (*)** in the reference field would include all reference numbers in the search results.

Continued on next page

Running the CDD Report, continued

Viewing on screen practice

After completing the selection criteria box, the report data displays on screen. Follow this example:

Step	Action
1	<p>a. Select the CDD report selection from the menu tree by clicking the plus sign. Click Subsystem Folders by clicking the plus sign.</p> <p>b. Click Budgeting by clicking the plus sign.</p> <p>c. Select BD_FORM_400 by double-clicking. Be sure to use the correct department code.</p>  <p>Note: This report does not have variations. When there are variations and you double click the form name, you will get the first variation listed.</p>
2	<p>Complete the selection criteria box.</p>  <p>Above, all departments and divisions are included with use of the wildcard symbol. The ledger must be entered. The fiscal year is 2012.</p> <p>Note: Remember, the ledger must be in capital letters.</p>
3	<p>Press Enter or click OK.</p>

Running the CDD Report, continued

Step	Action																																																
4	<p>This is an example of a report produced by double-clicking BD_FORM_400.</p> <p style="text-align: center;">Harris County Training Fiscal Year 2012 Form 400 - Department Budget Summary</p> <p>Department: 301 - HARRIS COUNTY CONSTABLE PCT. 1</p> <hr/> <p>Division: 0000 - NOT APPLICABLE</p> <p><u>MISSION STATEMENT:</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>AUTHORIZED PERSONNEL</u></th> <th style="text-align: right;"><u>FY 2009 - 2010</u></th> <th style="text-align: right;"><u>FY 2010 - 2011</u></th> <th style="text-align: right;"><u>FY 2011 - 2012</u></th> </tr> </thead> <tbody> <tr> <td>regular</td> <td style="text-align: right;">4</td> <td style="text-align: right;">6</td> <td style="text-align: right;">0</td> </tr> <tr> <td>TEMPORARY - TESTING-OCTOBER 1,2008</td> <td style="text-align: right;">50</td> <td style="text-align: right;">102</td> <td style="text-align: right;">0</td> </tr> <tr> <td>part time</td> <td style="text-align: right;">80</td> <td style="text-align: right;">100</td> <td style="text-align: right;">0</td> </tr> <tr> <td>testing</td> <td style="text-align: right;">500</td> <td style="text-align: right;">200</td> <td style="text-align: right;">0</td> </tr> <tr> <td>DIVISION TOTAL:</td> <td style="text-align: right;">834</td> <td style="text-align: right;">660</td> <td style="text-align: right;">0</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>PERFORMANCE STATISTICS</u></th> <th style="text-align: right;"><u>FY 2009 - 2010</u></th> <th style="text-align: right;"><u>FY 2010 - 2011</u></th> <th style="text-align: right;"><u>FY 2011 - 2012</u></th> </tr> </thead> <tbody> <tr> <td>Civil Process Received-9/28/09-TEST</td> <td style="text-align: right;">210,000</td> <td style="text-align: right;">444,000</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Foreign Process Received</td> <td style="text-align: right;">6000</td> <td style="text-align: right;">7000</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Warrants executed</td> <td style="text-align: right;">333</td> <td style="text-align: right;">334</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Fees collected</td> <td style="text-align: right;">\$333,333</td> <td style="text-align: right;">\$444,444</td> <td style="text-align: right;">0</td> </tr> <tr> <td>warrants</td> <td style="text-align: right;">500</td> <td style="text-align: right;">500</td> <td style="text-align: right;">0</td> </tr> </tbody> </table>	<u>AUTHORIZED PERSONNEL</u>	<u>FY 2009 - 2010</u>	<u>FY 2010 - 2011</u>	<u>FY 2011 - 2012</u>	regular	4	6	0	TEMPORARY - TESTING-OCTOBER 1,2008	50	102	0	part time	80	100	0	testing	500	200	0	DIVISION TOTAL:	834	660	0	<u>PERFORMANCE STATISTICS</u>	<u>FY 2009 - 2010</u>	<u>FY 2010 - 2011</u>	<u>FY 2011 - 2012</u>	Civil Process Received-9/28/09-TEST	210,000	444,000	0	Foreign Process Received	6000	7000	0	Warrants executed	333	334	0	Fees collected	\$333,333	\$444,444	0	warrants	500	500	0
<u>AUTHORIZED PERSONNEL</u>	<u>FY 2009 - 2010</u>	<u>FY 2010 - 2011</u>	<u>FY 2011 - 2012</u>																																														
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Running the CDD Report continued

Drill within the report

“Drill” is a means of displaying additional reports *related* to the selected data in the column. To do this, with your cursor, hover over an entry. When the cursor changes into an icon of a drill (or magnifying glass), double-click and the related report displays.

Org Key	Description	PEID	PE Name / PR Description	Encumbrance Amount	Distributed & Paid Amount	Date of Last Activity
10030101	ADMINISTRATION DIVISION					
610100	P093090 02/17/2010	223723921	VERIZON WIRELESS	1.00	0.00	02/17/2010
610100	P093093 02/17/2010	431385701	SUR-TEC INCORPORATED	48,000.00	0.00	02/18/2010
610100	P093618 02/17/2010	004943700	KUSTOM SIGNALS INC	1,000,000.00	0.00	02/17/2010
610100	P094144 07/26/2005	741356062	KEY MAPS INC	1,034,260.70	0.00	02/17/2010
610100	P094205 02/17/2010	742616805	DELL MARKETING LP	299,925.00	0.00	02/17/2010
610100	R189284 04/16/2010	742616805	DELL MARKETING LP	0.00	0.00	04/16/2010
610100	R189601 04/20/2010	742616805	DELL MARKETING LP	0.00	0.00	04/20/2010
610100	R189614 07/09/2007	742616805	DELL MARKETING LP	504.00	0.00	07/09/2007
610100	R189686 04/19/2010	742616805	DELL MARKETING LP	33.00	0.00	04/19/2010
610100	R189908 08/09/2007	742616805	DELL MARKETING LP	0.00	0.00	08/09/2007
610100	R190059 08/15/2007	742616805	DELL MARKETING LP	4.00	0.00	08/15/2007
610100	R190062 08/15/2007	742616805	DELL MARKETING LP	-170.00	0.00	08/15/2007
610100	R192025 04/09/2009	742616805	DELL MARKETING LP	169.90	0.00	04/09/2009
610100	R192026 04/09/2009	742616805	DELL MARKETING LP	56,604.00	0.00	04/09/2009
610100	R192050 05/05/2009	742616805	DELL MARKETING LP	623.75	0.00	05/05/2009
610100	R192051 05/05/2009	841443351	CORPORATE COACH U INC	600.00	0.00	05/05/2009
610100	R192054 05/05/2009	000312500	MICROSOFT CORP	720.00	0.00	05/05/2009
610100	R192057 05/05/2009	742616805	DELL MARKETING LP	6,000.00	0.00	05/05/2009
610100	R192092 06/18/2009	943027237	OZARKA NATURAL SPRING WATER	29.75	0.00	06/18/2009
610100	R192103 06/18/2009	943027237	OZARKA NATURAL SPRING WATER	29.75	0.00	06/18/2009
610100	R192110 07/07/2009	943027237	OZARKA NATURAL SPRING WATER	16.25	0.00	07/07/2009
610100	R192115 07/07/2009	742616805	DELL MARKETING LP	1,100.00	0.00	07/07/2009
610100	R192124 08/11/2009	742616805	DELL MARKETING LP	35,150.00	0.00	08/11/2009
610100	R192133 08/11/2009	742616805	DELL MARKETING LP	54.00	0.00	08/11/2009
610100	R192158 10/20/2009	742616805	DELL MARKETING LP	923.75	0.00	10/20/2009
610100	P102178 10/20/2009	502663054	DELL MARKETING LP	7.50	0.00	10/20/2009

Resulting report from the drill down operation

GL Ledger: HC
Report Date: 10/06/2010

Harris County Training
Open Encumbrance Transactions by Reference (PO #)

PO Reference	PR Reference	Vendor Name
P094144	R187465	KEY MAPS INC

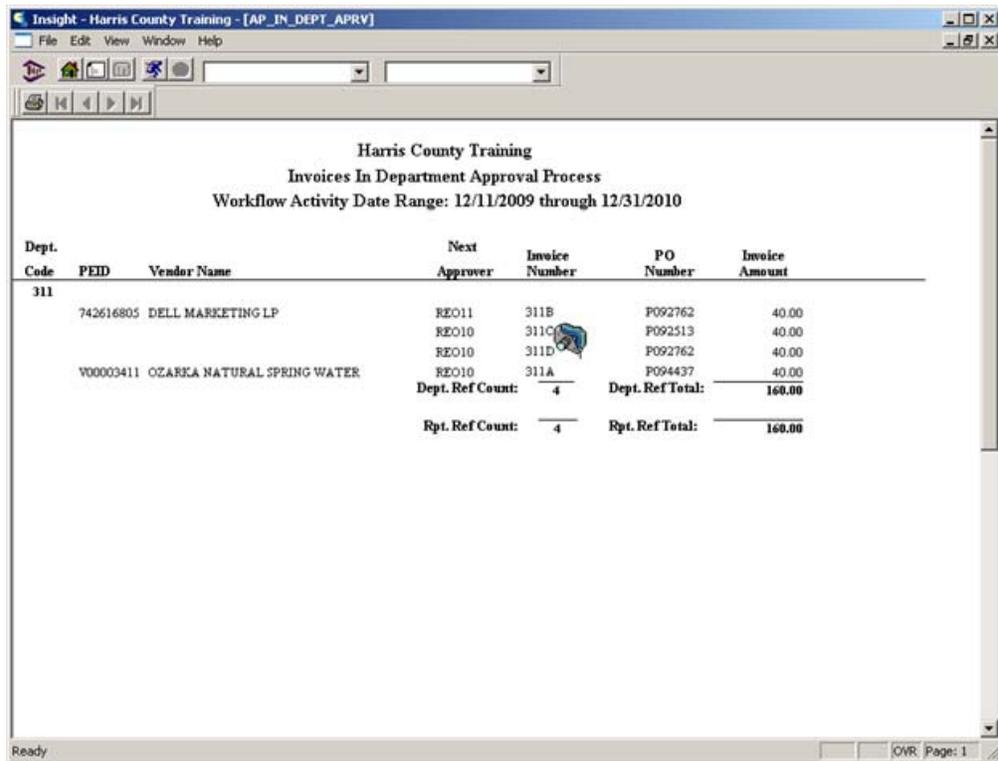
Type	Org. Key	Object	JL Key	JL Obj	Description	JL Key Desc	Post Date
EN	10030101	610100	A910000000	350B0000	47TH EDITION HARRIS COUNTY ATL	ADMINISTRATION DIVISION	07/26/2005
EN	10030101	610100	A910000000	350B0000	SHIPPING AND HANDLING CHARGE	ADMINISTRATION DIVISION	07/26/2005
EN	10030101	610100	A910000000	350B0000	47TH EDITION HARRIS COUNTY ATL	ADMINISTRATION DIVISION	02/17/2010
EN	10030101	610100	A910000000	350B0000	Adjustment	ADMINISTRATION DIVISION	02/17/2010
EN	10030101	610100	A910000000	350B0000	Adjustment	ADMINISTRATION DIVISION	02/17/2010
EN	10030101	610100	A910000000	350B0000	47TH EDITION HARRIS COUNTY ATL	ADMINISTRATION DIVISION	02/17/2010
EN	10030101	610100	A910000000	350B0000	47TH EDITION HARRIS COUNTY ATL	ADMINISTRATION DIVISION	02/17/2010

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Running the CDD Report continued

Drill within the report (continued)

In addition, there may be an image attached to a report. Hovering over this field displays a camera icon. Click the item to see the image.



Dept. Code	PEID	Vendor Name	Next Approver	Invoice Number	PO Number	Invoice Amount
311	742616805	DELL MARKETING LP	RE011	311B	P092762	40.00
			RE010	311C 	P092513	40.00
			RE010	311D	P092762	40.00
	Y00003411	OZARKA NATURAL SPRING WATER	RE010	311A	P094437	40.00
				Dept. Ref Count:	4	Dept. Ref Total: 160.00
				Rpt. Ref Count:	4	Rpt. Ref Total: 160.00

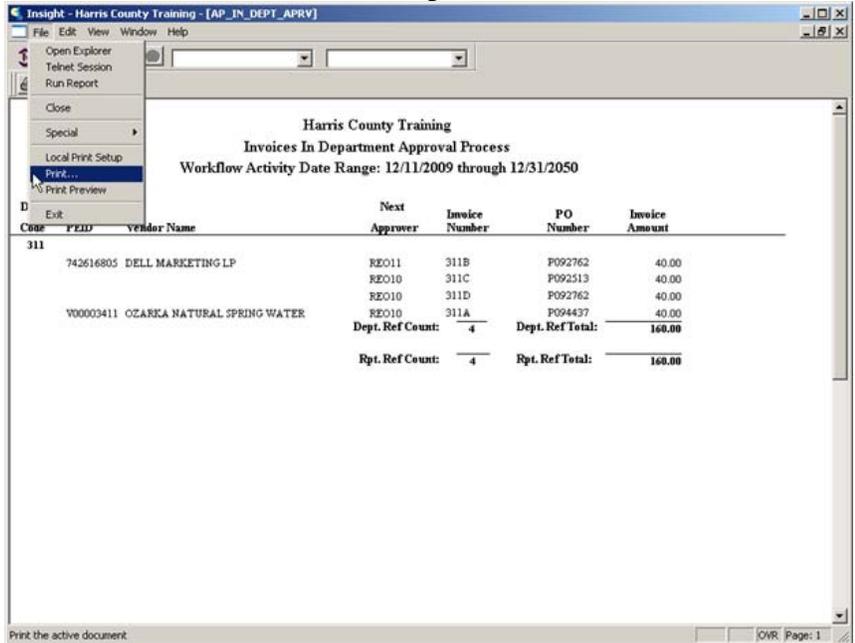
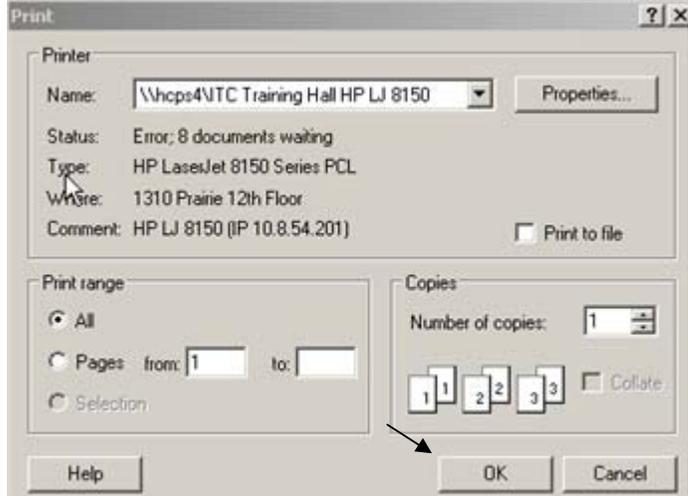
Note: Not all reports will have related reports or images.

When drilling, you may get a message that says the item is archived. In that case, e-mail the Help Desk at ITCHelpDesk@hctx.net to get help on accessing the information.

Printing CDD Reports

Printing CDD Reports

Follow these procedures for printing CDD reports.

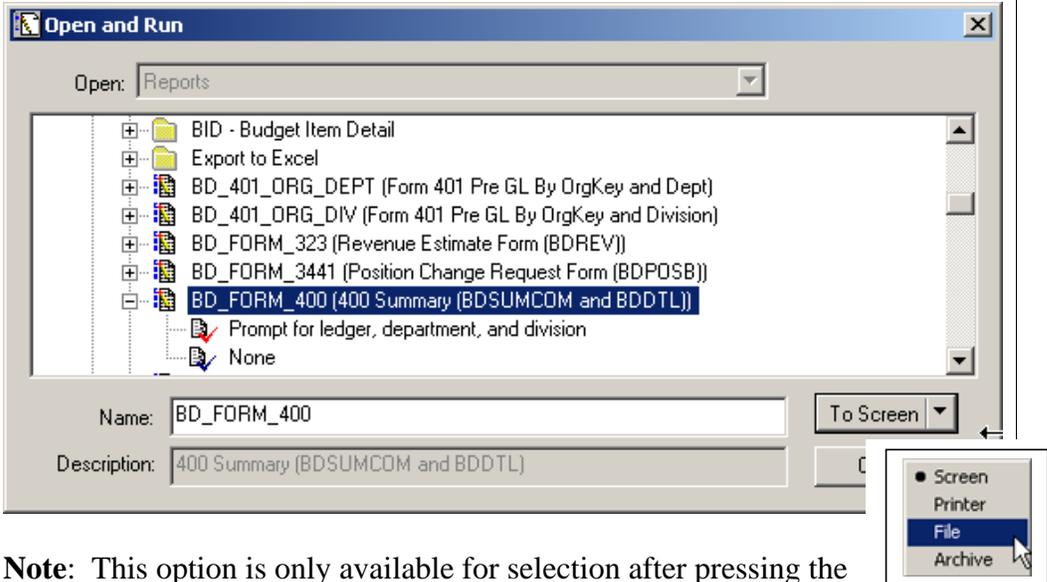
Step	Action
1	Select and run the CDD report.
2	<p>Click File > Print. Or, click the printer icon </p> 
3	The Print dialog box for your default department network printer displays. Set the printing range and number of copies.
4	<p>Click OK.</p> 

Your output goes to the specified printer.

Exporting CDD Reports to Excel

Introduction Before you start this export process, run the report *on screen* in IFAS to be sure that you have selected the desired data.

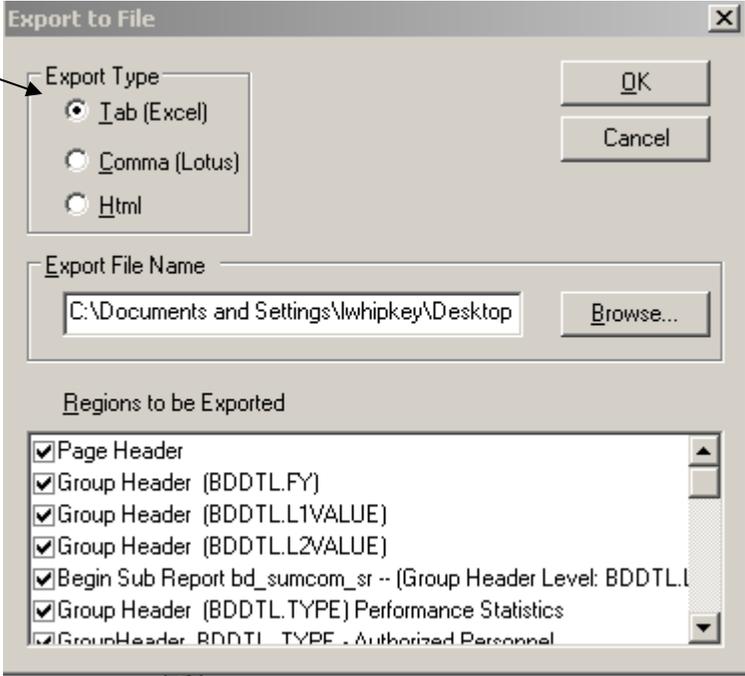
Exporting to .txt file Follow this procedure to export a CDD report to Excel.

	Action
1	Click the Running Man  on the toolbar.
2	The Open and Run dialog box opens.
3	<p>Choose a report by highlighting it. Click the down arrow of the To Screen button. Choose File in the drop-down box.</p>  <p>Note: This option is only available for selection after pressing the Running Man and then highlighting the report.</p>

Continued

Exporting CDD Reports to Excel, Continued

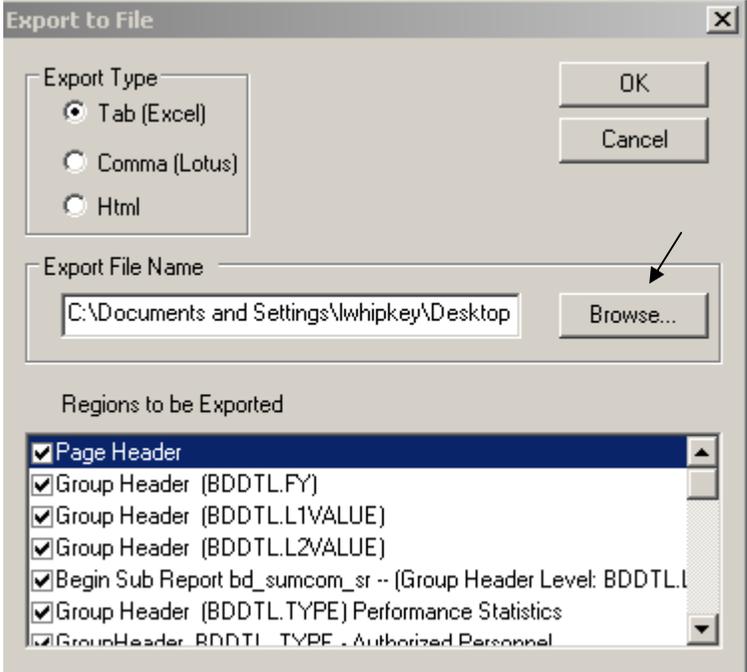
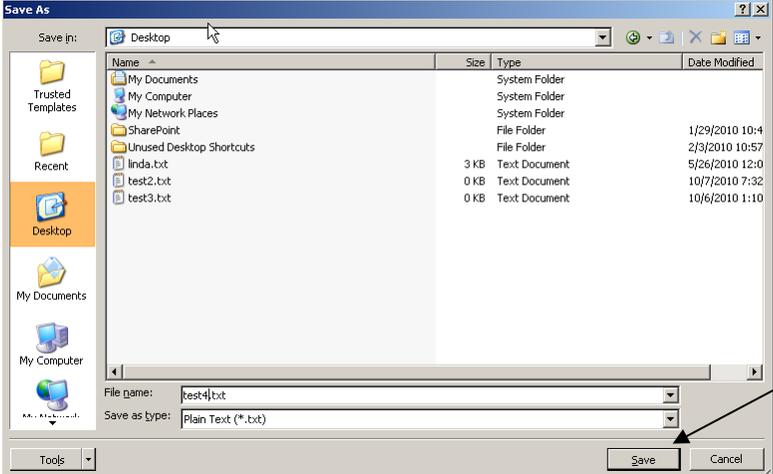
Exporting to
.txt file
(continued)

4	Double-click the report you want to run. The selection criteria dialog box for the search appears. Complete the fields as needed. Click OK . The report will be converted to a text file for transfer to Excel.
5	The Export to File dialog box appears. 
6	Accept the default Export Type as Tab .

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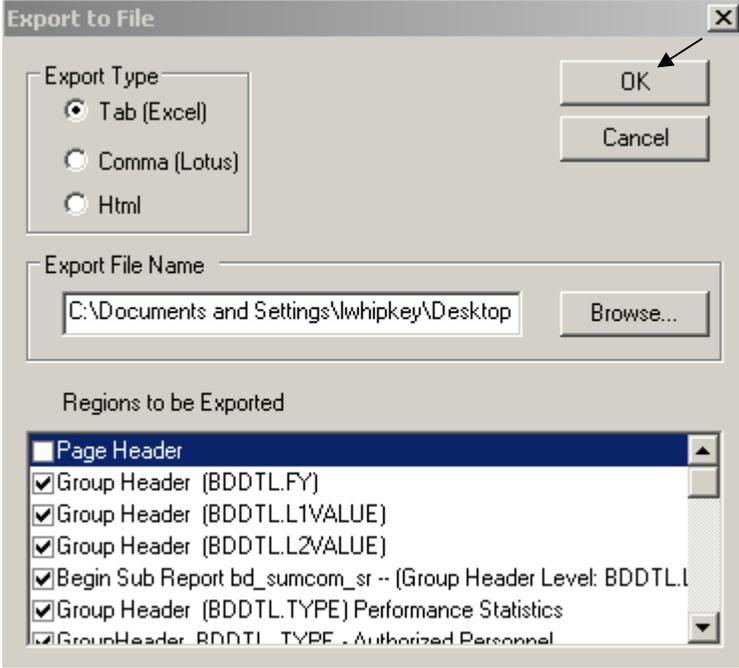
Exporting CDD Reports to Excel, Continued

Exporting to .txt file (continued)

Step	Action
7	<p>Click the Browse button to specify the location and create a file name.</p> 
8	<p>Click Save. This file will be in the .txt format.</p> 

Exporting CDD Reports to Excel, Continued

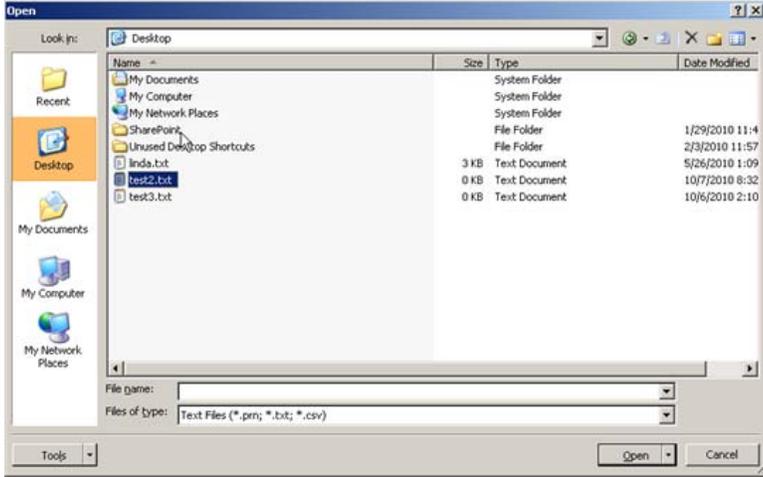
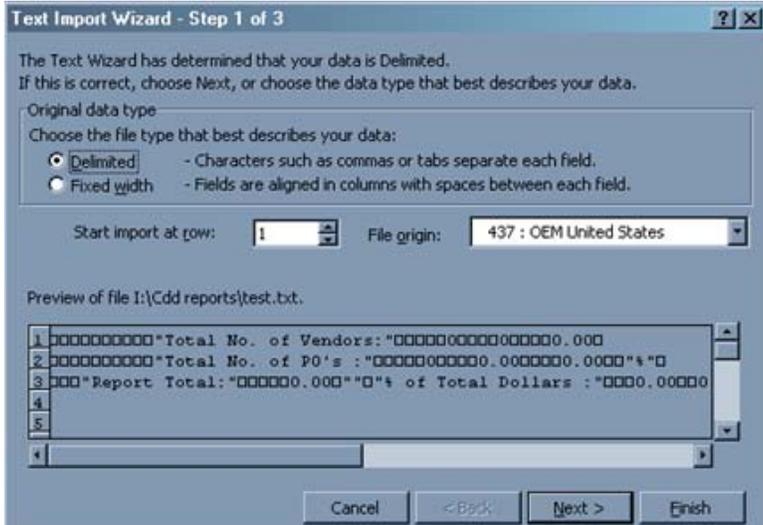
Exporting to .txt file (continued)

Step	Action
9	<p>All Regions to be Exported are included as a default. Choose the region that you want to exclude from the report on the Export to File dialog box. Clicking on the checkbox will uncheck the item and exclude it from the export. Uncheck Page Header and Page Footer.</p> 
10	<p>Click OK to save as a .txt file.</p> <p>You will now use the standard steps for importing documents into Excel.</p>

Exporting CDD Reports to Excel, Continued

Excel procedures: importing .txt files

The following are general procedures used for importing a text file into Excel.

Step	Action
1	<p>Open Excel. Click Open in the Office Button. Change the Files of Type to Text Files. Use the Look in field to find the location where you saved the CDD text document.</p> 
2	Select the name of the file created from the CDD report.
3	Click Open .
4	<p>The Text Import Wizard opens. Be sure that Delimited is selected. Click Next for step 2 of 3.</p> 

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Exporting CDD Reports to Excel, Continued

Excel procedures: importing .txt files

5 Select the desired delimiter and click **Next** for step 3 of 3.

6 Select the Column data format for each column. Then, click **Finish**.

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Exporting CDD Reports to Excel, Continued

Formatting the Excel report

With the CDD report in Excel, you can resize any column or cell to accommodate data.

Note: Excel will default to the portrait orientation. Switch to landscape for easier reading.

To get the best hard copy of your report, follow these steps.

Step	Action
1	Click the Print Preview on the Office button under Print. This gives a view of what the document will look like after printing.
2	Click the Page Setup icon . Change the orientation from Portrait by choosing Landscape . <div data-bbox="516 793 1360 1680" data-label="Image"> </div>
3	Under the Page tab , Scaling allows you to format the columns.
4	You may also make margins as desired by clicking the Margins tab .

JustIFAS and CDD Reports

Introduction

This is information related to the website dedicated to IFAS.

JustIFAS

www.justifas.net is a web site dedicated to IFAS assistance. On the right of the screen, you will find help on topics related to CDD reports. **CDD4U** lists and describes selected CDD reports and outlines how to run these reports. In addition, it provides instruction on how to e-mail them to co-workers. **CDD Reports** links to a listing of *all* reports and provides additional information.

On the left of the screen, CDD reports are filtered by module.

The screenshot shows the Harris County IFAS Community Website. On the left, a box labeled "Topics leading to CDD reports for the modules specified" has a bracket pointing to a list of modules under the "Financial" heading, including Account Code Structure (ACS), Accounts Payable (AP), Accounts Receivable/Cash Receipting (AR), Bank Reconciliation (BK), Budget Item Detail (BID), Documents Online (DO), Encumbrances (EN), General Ledger (GL), Grants Management (GM), and Person Entry (PE). On the right, a box labeled "Link leading to all CDD reports" has an arrow pointing to the "CDD Reports" link in the "General Information" section, which is highlighted with a red box. Other links in the "General Information" section include About ITC-FHRA, About IFAS, CDD4U (with a "New" icon), FBS TRACKS, FHRA Projects, FAO's, IFAS Documentation, IFAS Forms, IFAS Training, ITC Help Desk (713-755-6624), and 7I Deployment By Module. The top of the page features the Harris County logo, a search bar for JustIFAS, and navigation links like "HC Intranet Home Page" and "County Directory".

Standard Reports

Introduction

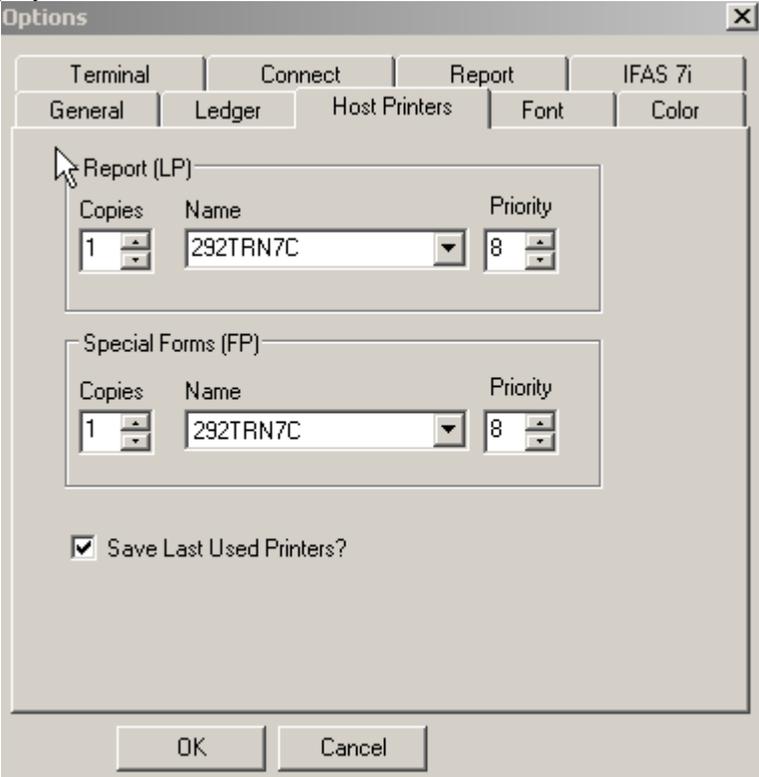
Standard reports are found within each module; they are non-CDD reports. Navigate to these Standard reports by choosing the desired module in the Menu tree. The reports are listed within the module and some reports have more than one version, with different information, prompts and selection criteria.

Note: Harris County generally uses CDD reports rather than the Standard reports covered here.

Standard Reports continued

Initial setup

These procedures are for confirming that your computer will print to the IFAS printer in your area. Standard reports use only the IFAS printer.

Step	Action
1	<p>Click Edit>Options on the menu bar. The Options dialog box displays.</p> 
2	<p>Under the Host Printers tab, select the name of the printer that is designated as the IFAS printer. The default printer name should always end with C. This will allow the report to print according to how it was written; ie., landscape or portrait. Keep the priority setting of 8.</p>
3	<p>Click OK.</p> <p>Note: You will do this only once, unless you want to change the printer you are going to use.</p>

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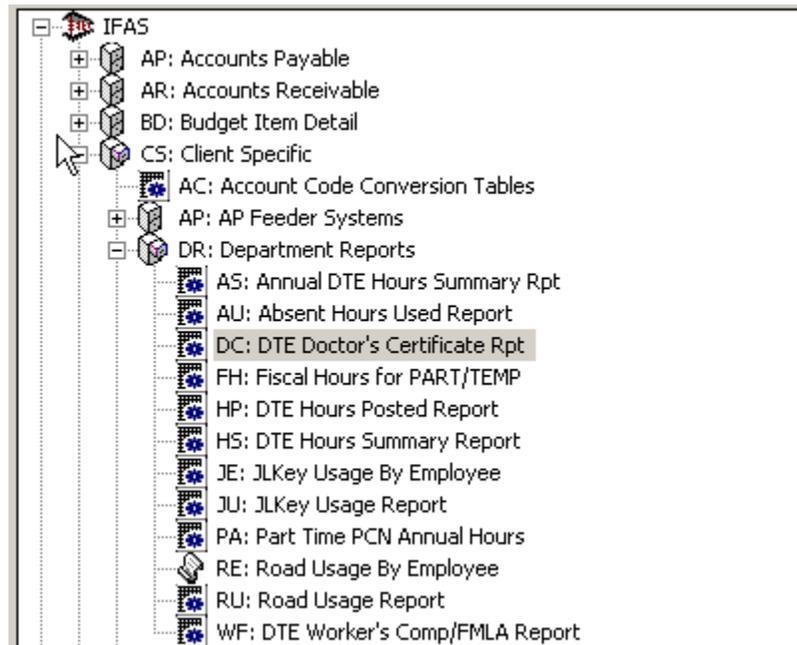
Running the Standard Report

How to select a report

There are numerous standard reports from which to choose. In some cases, you will find variations of the report listed when the title is expanded. To expand a report, click the plus (+) sign that appears before the title. The plus (+) sign changes to a minus (-) sign. Choose the variation desired by double-clicking it.

Note: You may not have access to all reports depending on your security.

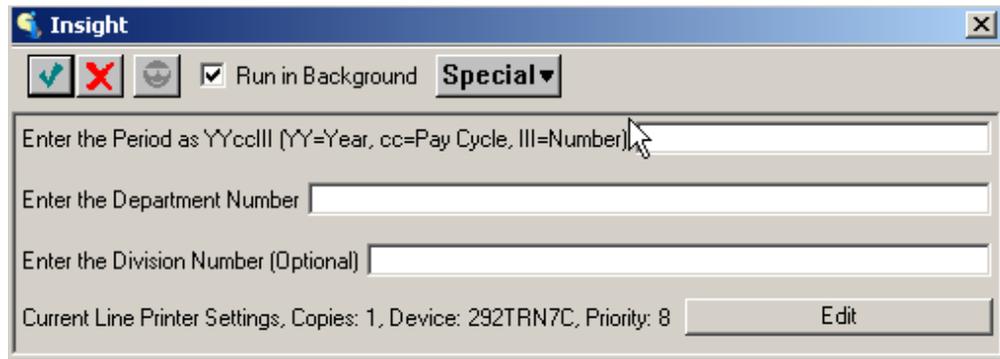
As an example, observe **CSDRDC: DTE Doctor's Certificate Rpt**. The Menu tree below shows an expanded **DR:Department Reports**. We highlight the DTE Doctor's Certificate Report.



Running the Standard Report continued

Selection Criteria

After double-clicking DC: DTE Doctor's Certificate Rpt, the following selection criteria box displays. Completing this selection criteria box yields the report.



The screenshot shows a dialog box titled "Insight" with a close button (X) in the top right corner. Below the title bar, there are three icons: a green checkmark, a red X, and a grey circle with a diagonal line. To the right of these icons is a checked checkbox labeled "Run in Background" and a dropdown menu currently set to "Special".

The main area of the dialog contains three text input fields:

- The first field is labeled "Enter the Period as YYccIII (YY=Year, cc=Pay Cycle, III=Number)".
- The second field is labeled "Enter the Department Number".
- The third field is labeled "Enter the Division Number (Optional)".

At the bottom of the dialog, there is a status bar that reads "Current Line Printer Settings, Copies: 1, Device: 292TRN7C, Priority: 8" and an "Edit" button on the right.

Running the Standard Report, Continued

Standard Report Buttons

On the toolbar of the selection criteria prompt box, find these buttons:

- Checkmark  - This starts the record search.
- The red X  - This closes the dialog box for the selection criteria.
- The checkbox for running in the background  Run in Background - This should always be checked.

The Special Button  lists defaults and usually should not be changed. You should check with your supervisor to determine if you are going to print special forms and which printer you should use.

How to run a Standard report

This section gives you basic information for running Standard reports. From the listing of reports, choose the desired report by double-clicking on its title.

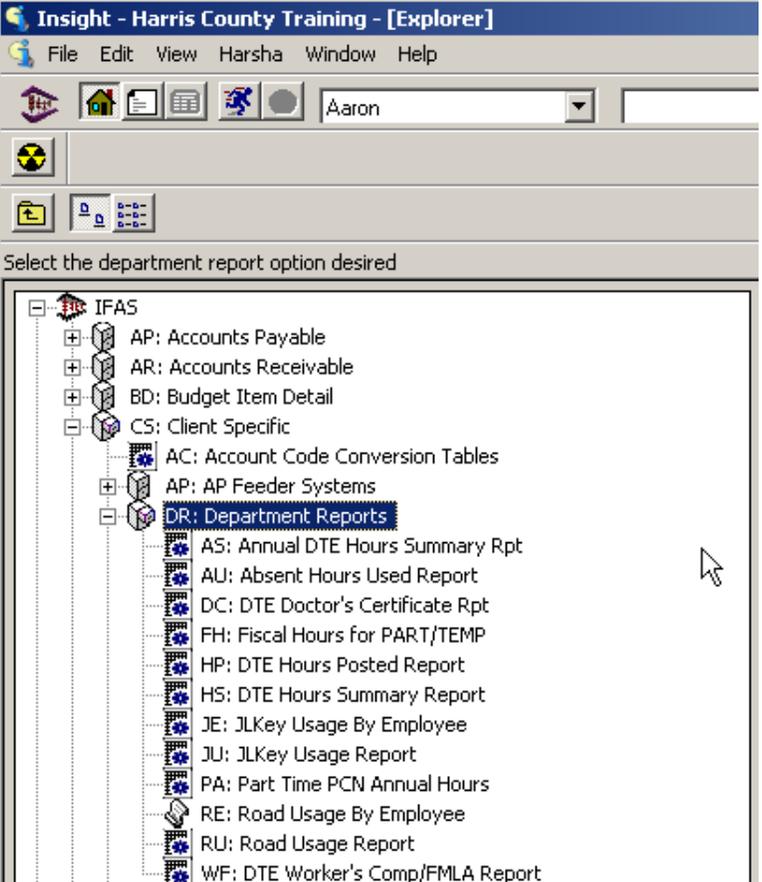
Note: In some cases, you will find variations of the report listed when the title is expanded. To expand the report, click the plus (+) sign that appears before the title. The Plus (+) sign changes to a minus (-) sign. Choose the variation by double-clicking it.

Continued on next page

Running the Standard Report, Continued

How to run a Standard report (continued)

Step	Action
1	Select CS:Client Specific by clicking the plus(+) sign.
2	Click DR:Department Reports by clicking the plus (+) sign.

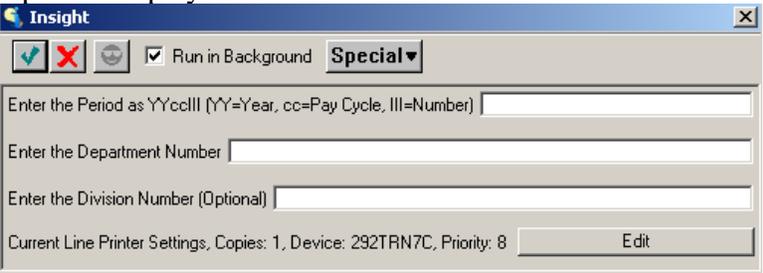


Note: You may use @ as a **wildcard** to specify all of the records in a field.

Running the Standard Report, Continued

How to run a Standard report (continued)

You may use a wildcard in a field

Step	Action
3	<p>Double-click DC:DTE Doctor's Certificate Rpt. The following prompt box displays.</p> 
4	<p>Complete the selection criteria and check that the printer is the IFAS printer in your area.</p> <p>Note: You need to see all criteria. Do this by right clicking in the gray area. This will allow you to see if there are more options available; choose 'Show All.' This is something done in addition to using the scroll bar to find fields that aren't visible on the initial view.</p>

Running a Standard Report, Continued

Selection Criteria Examples

The figure below shows an example of criteria that you can choose for a selected standard report. Note that you have radio buttons as well as checkboxes. You can choose only one radio button. You may choose several checkboxes that pertain to your search. Be sure to use the scroll bar to find and complete fields that may not be visible on the initial view. The more criteria, the more exact and concise the resulting report will be. This should make the print job run faster. When you complete selection criteria, right click in the gray area. This will allow them to see if there are more options. Choose “Show All.”

See the screen shot below for examples of selection criteria. Make appropriate selections for your criteria.

The screenshot shows a window titled "Insight" with a toolbar containing a checkmark, a red X, a refresh icon, a checked "Run in Background" checkbox, and a "Special" dropdown menu. The main area contains several sections:

- Enter the Ledger Side:** Radio buttons for "GL Side - Harris County" (selected) and "JL Side - JOB LEDGER".
- Enter the TYPE of Selection Criteria separated by commas:** Checkboxes for "HC - Organization Key", "HC - Fully Qualified Acct#", "HC - Object Code", and "Budget Information".
- Please enter the Report Date:** Text field containing "11/30/2010".
- Enter the Report Definition File:** Empty text field.
- Would you like to create a DIF file from this report?:** Radio buttons for "Yes" and "No" (selected).
- Enter the Budget Version to be used:** Radio buttons for "Budget Office" (selected), "LEGALLY ADOPTED", "MODELING PRJCTNS", "USER PROJECTIONS", "YTD ACTUALS", "DEPART REQUEST", "ADJUSTED BUDGET", "ENCUMBRANCES", "USER ADJUSTMENTS", and "PRIOR YR ACTUALS".

At the bottom, it displays "Current Line Printer Settings, Copies: 1, Device: 292TRN7C, Priority: 8" and an "Edit" button.

Printing Standard Reports

Printing Standard reports

To print a Standard report, follow these steps.

Step	Action
1	Double-click the report from the Insight Explorer view.
2	An Insight dialog box displays. Complete the selection criteria.
3	Click the green checkmark to begin printing.

Green Checkmark

Selection Criteria

Printer settings (Don't change.)

Printing Standard Reports, Continued

Standard Report Example

This is an example of a standard report.

Harris County Training G E N E R A L L E D G E R

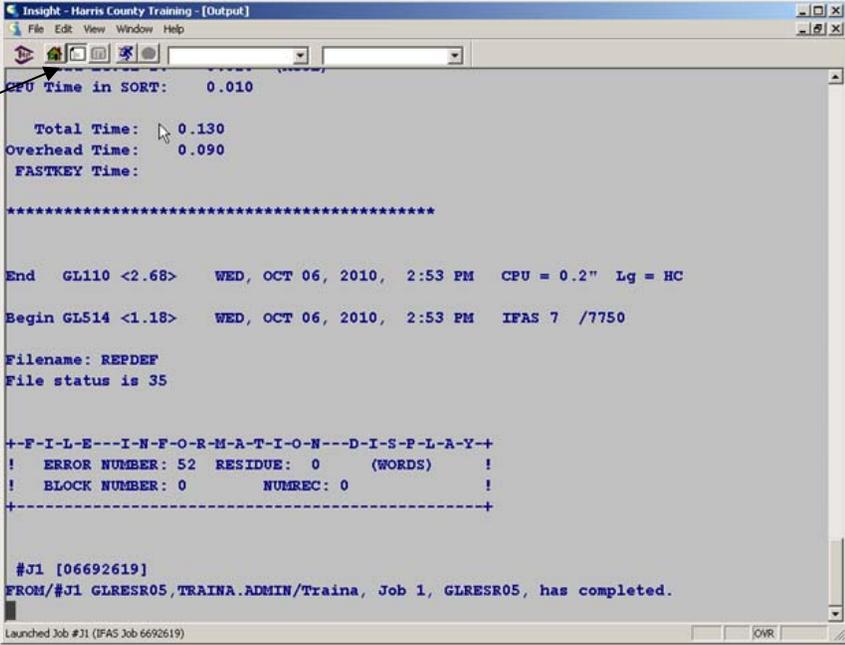
```
SELECT  Organization Key: 10030101
```

FDGT	FDGT	Description	Sort	Description
1000	GENERAL FUND			OBJ within FDGT

OBJ CODE	OBJ CODE	Description	Debit	Credit
540900	FINES-OTHER		0	3
610100	OFFICE SUPPLIES		0	0
620100	BLDG CONSTRUCTION		0	0
621300	EQUIPMENT REPAIR & MAINT		0	0
630999	OTHER FEES & SERVICES		0	0
633800	RENTALS/LEASES		0	0
638300	TELEPHONE		8820	22421

Printing Standard Reports, Continued

Output View

Step	Action
1	<p>Check the Output view  icon in the toolbar for information about the job.</p>  <p>The screenshot shows a window titled "Insight - Harris County Training - [Output]". It contains the following text:</p> <pre> CPU Time in SORT: 0.010 Total Time: 0.130 Overhead Time: 0.090 FASTKEY Time: ***** End GL110 <2.68> WED, OCT 06, 2010, 2:53 PM CPU = 0.2" Lg = HC Begin GL514 <1.18> WED, OCT 06, 2010, 2:53 PM IFAS 7 /7750 Filename: REPDEF File status is 35 +-F-I-L-E---I-N-F-O-R-M-A-T-I-O-N---D-I-S-P-L-A-Y-+ ! ERROR NUMBER: 52 RESIDUE: 0 (WORDS) ! ! BLOCK NUMBER: 0 NUMREC: 0 ! +-----+ #J1 [06692619] FROM/#J1 GLRESR05,TRAINA.ADMIN/Traina, Job 1, GLRESR05, has completed. </pre> <p>This screen documents if there were errors for the print job or if the job was successful.</p>

Output View

Review

True or False

1. To change the way the name of a CDD report is displayed, left click the white area anywhere on the screen.
2. You may have to scroll down to see all fields for a Standard report dialog box.
3. To find the IFAS printer that print jobs for Standard reports, go to Edit>Options> Host Printers.
4. When exporting a CDD report to Excel, Delimited is the file type selected to describe your data.

Short Answer

1. Explain why it is important to check checkboxes and fill in fields when preparing a report.
2. What are the steps for printing a CDD report?
3. You may not have access to all reports. Why?

Review Answers

True and False

1. False – right click the white area in the dialog box.
2. True
3. True
4. True

Short answer

1. Check checkboxes and fill in fields so that the report meets your needs and is as concise as possible and it may run faster.
2. To print a CDD report:
 - Display the report on screen.
 - Click **File > Print** or click the printer icon in the toolbar.
 - Set the printing range and number of copies.
 - Click **OK**.
3. You may not have access to all reports because you lack the proper security.