



REPORT MANAGER QUICK REFERENCE GUIDE

Overview

Monthly reports are archived and can be accessed in the Finance Production environment via the Report Manager tool. The Report Manager is much like your own personal “inbox” of reports and process outputs. The Report Manager provides a secured means to view report content, check the posting status of your output, and see content detail messages.

The screenshot shows the Report Manager interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Reporting Tools', and 'Report Manager'. Below this are four tabs: 'List' (highlighted in red), 'Explorer' (yellow), 'Administration' (green), and 'Archives' (purple). A 'View Reports For' section contains fields for 'User ID' (CKGEORGE), 'Type' (BI Publisher), 'Last' (30 Days), and a 'Refresh' button. Below this is a 'Report List' table with columns for 'Select', 'Report ID', 'Prce Instance', 'Description', 'Request Date/Time', 'Format', 'Status', and 'Details'. The table contains four rows of report data.

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3762230	5330503	UMBIPBURST [423] - SQR Report UMG7003 Award Activity Report As Of Date 12-31-2013.pdf	01/12/2014 1:38:45PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3762226	5330379	UMBIPBURST [406] - SQR Report UMGL7053 Balance Sheet Detail As Of Date 12-31-2013.pdf	01/12/2014 1:24:27PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3762217	5330378	UMBIPBURST [42] - SQR Report UMGL7079 Open Encumbrance Rpt As Of Date 12-31-2013.pdf	01/12/2014 1:16:54PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3762078	5330372	UMBIPBURST [42] - SQR Report UMGL 7045 Rev and Expense Activ As Of Date 12-31-2013.pdf	01/12/2014	Acrobat	Posted	Details

Navigation

Reporting Tools > Report Manager

Tab Options

- LIST TAB:** Displays reports from multiple databases to which you have access. You may sort any of the columns in this view including Report ID or Name. Use the Folder criteria to filter the different types of reports.
 - EXPLORER TAB:** Displays a hierarchical view of folders and reports much like the former MOBIUS system.
 - ADMINISTRATION TAB:** Displays all the reports you have run, details about the reports, and enables you to delete unwanted reports from the system.*
 - ARCHIVES TAB:** This tab is not currently functional and should not be used.
- *NOTE: On the ADMINISTRATION TAB the Details link becomes active when the STATUS of your report is POSTED. . Use this link to view your report.



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Helpful Search Criteria

There are many ways to search for reports in the **Report Manager**. The following search criteria are the suggested best methods to perform your search:

- **Date/Time Criteria:** You can use the following dropdown found on the **Administration** tab to search for a report you know was created in a specific timeframe.

The screenshot shows the 'View Reports For' section of the Report Manager interface. A red arrow points to the 'Days' dropdown menu, which is currently open, showing options: All, Days, Hours, Minutes, and Years. The 'User ID' is set to 'CKGEORGE', 'Type' is blank, 'Last' is set to '30', and 'Days' is selected. The 'Report List' table below shows two reports:

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3762226	5330379	UMBIPBURST [406] - SQR Report UMGL7053 Balance Sheet Detail As Of Date 12-31-2013.pdf	01/12/2014 1:24:27PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3761747	5330450	UMBIPBURST [406] - SQR Report UMGL7079 Open Encumbrance Rpt As Of Date 12-31-2013.pdf	01/12/2014 10:10:49AM	Acrobat (*.pdf)	Posted	Details

Please Note: Make sure you update the **Last** criteria to properly accommodate the **Date/Time** criteria for a successful search. If you wish to use a **Date Range** instead of the **Last** criteria, be sure to choose the **All** criterion found in the **Days** dropdown.

- **Folder Criteria:** The Folder criteria (found on both the **List** and **Administration** tabs) can quickly narrow down the category of reports you seek. *Note:* If left blank, you will view all reports which you have access to. If you choose the "General" folder you will see reports run to your user ID and any ad-hoc reports that have not been designated to a folder.

The screenshot shows the 'View Reports For' section of the Report Manager interface. A red arrow points to the 'Folder' dropdown menu, which is currently open, showing a list of folders including: A-DEPT MTHLY PACK, A-NONSP PROJ MTHLY, A-SPON PRJ/GRT MTH, AR REPORTS, B-AWARD YR END PAC, B-DEPT MTHLY PACK, B-NONSP PROJ MTHLY, B-SPON PRJ/GRT MTH, BILLING REPORTS, and C-AWARD YR END PAC. The 'User ID' is set to 'CKGEORGE', 'Type' is blank, 'Last' is set to '30', and 'Days' is selected. The 'Report List' table below shows three reports:


Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3762226	5330379	UMBIPBURST [406] - SQR Report UMGL7053 Balance Sheet Detail As Of Date 12-31-2013.pdf	01/12/2014 1:24:27PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3761747	5330450	UMBIPBURST [406] - SQR Report UMGL7079 Open Encumbrance Rpt As Of Date 12-31-2013.pdf	01/12/2014 10:10:49AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3760969	5330432	UMBIPBURST [406] - SQR Report UMGL7062 Transaction Detail As Of Date 12-31-2013.pdf	01/12/2014 8:26:51AM	Acrobat (*.pdf)	Posted	Details



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-Month End Reports: To more easily find the Month End Reports, the **As of Date** (the date the reports were run) are now part of the file name extension.



Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3762230	5330503	UMBIPBURST [423] - SQR Report UMGM7003 Award Activity Report As Of Date 12-31-2013.pdf	01/12/2014 1:38:45PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3762226	5330379	UMBIPBURST [406] - SQR Report UMGL7053 Balance Sheet Detail As Of Date 12-31-2013.pdf	01/12/2014 1:24:27PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3762217	5330378	UMBIPBURST [42] - SQR Report UMGL7079 Open Encumbrance Rpt As Of Date 12-31-2013.pdf	01/12/2014 1:16:54PM	Acrobat (*.pdf)	Posted	Details