



# REPORT MANAGER QUICK REFERENCE GUIDE

## Overview

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 the University of Massachusetts logo and the text 'TEST 91'. Below this is a breadcrumb trail: 'Favorites | Main Menu > Reporting Tools > Report Manager'. There are four tabs: 'List', 'Explorer', 'Administration', and 'Archives'. Below the tabs is a 'View Reports For' section with fields for 'User ID' (CKGEORGE), 'Type', 'Last' (40 Days), 'Status', 'Folder', and 'Instance'. A 'Refresh' button is also present. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The table contains two rows of report data.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	2581297	4151574	UMGM7007 [44] - UMGM7007 Award Activity Report As Of Date 07-31-2012.pdf	09/12/2013 6:02:32PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2580899	4151180	<a href="#">Aging Detail by Business Unit</a>	08/20/2013 4:24:38PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

## 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.



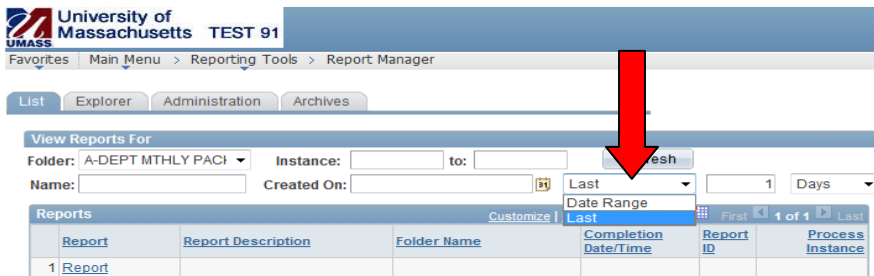
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## Helpful Search Criteria

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:

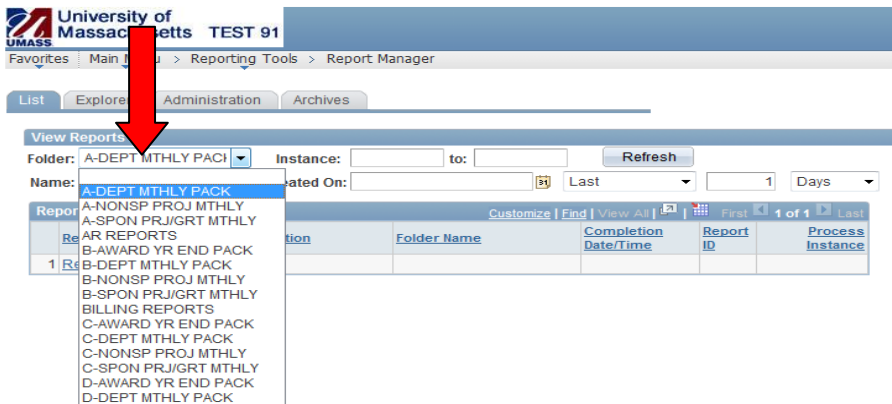
- **Date Criteria:** You can use the **Created On** Calendar (found only on the **List tab**) to search for a report you know was created on a specific date.

If you prefer to use a date range to perform your search, use the drop down shown below and select **Date Range**:



**Please Note:** All searches default to the **Last 1 Days** as shown above. Make sure you update the **Last** criteria to properly accommodate the **Created On** date 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.



- **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	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	2681577	4266708	UMGM7007 [18] - UMG7007 Award Activity Report As Of Date 05-31-2013.pdf	08/19/2013 12:53:30PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2681576	4266708	UMGM7007 [17] - UMG7007 Award Activity Report As Of Date 05-31-2013.pdf	08/19/2013 12:53:25PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>