

UMass e*mpac Reportng Console
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UMass e*mpac Reporting Console

The **Reporting Console** provides a single interface for a user to manage processes and reports. From the **Reporting Console** users can view, monitor and organize processes and reports.

Upon completion of Module you will learn how to:

- Use the Reporting Console

Using the Reporting Console

The new **Reporting Console** will be available for your use in e*mpac 9.1. While the **Process Monitor** and **Report Manager** are still options to use, the **Reporting Console** provides a streamlined presentation of both reports and processes. The **Reporting Console** allows you to view, monitor and organize your favorite reports and processes.

Upon completion of this topic you will be able to:

- Set up your display preferences
- Access your reports
- Monitor your run processes

Instructor Notes

Reporting Console:

It provides a streamlined presentation that allows users to view, monitor, and organize their favorite reports and processes.

Preferences - Manage your display for reports and processes.

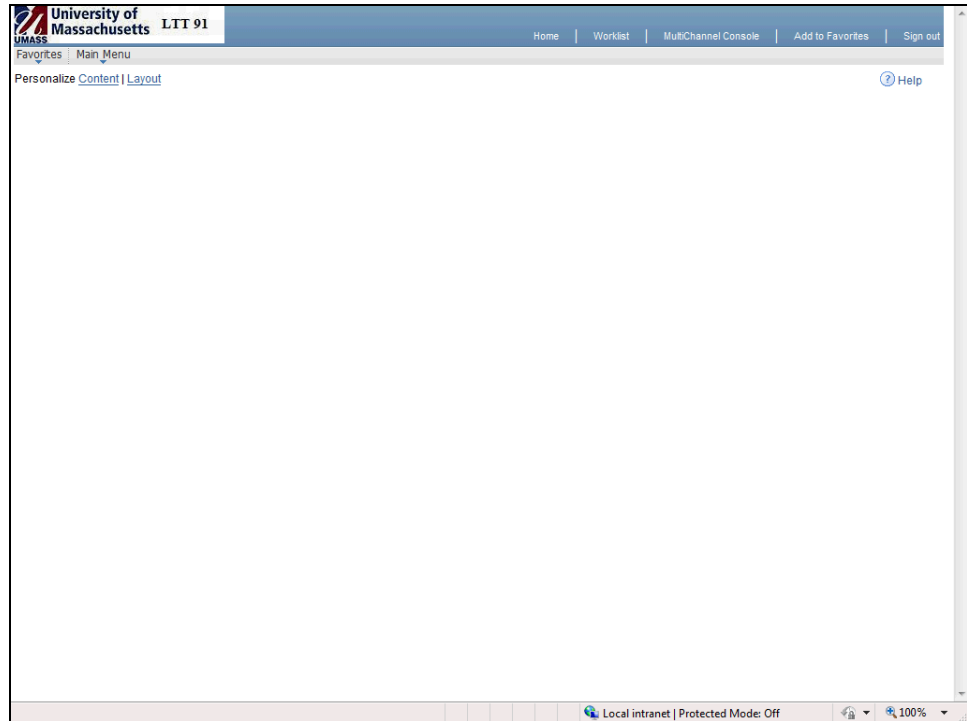
My Reports folder - Intended to alert users and provide access to newly shared reports


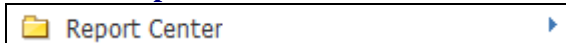
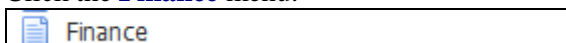
My Process Requests - Provides a list of processes based on the preferences you define.

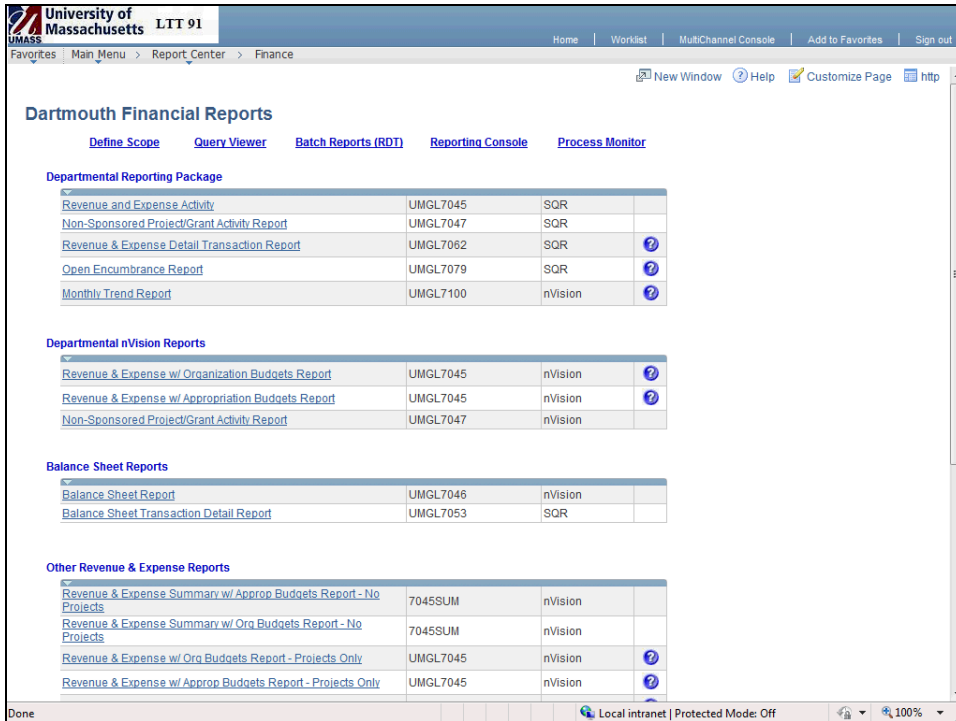
Procedure

Consider this Scenario:

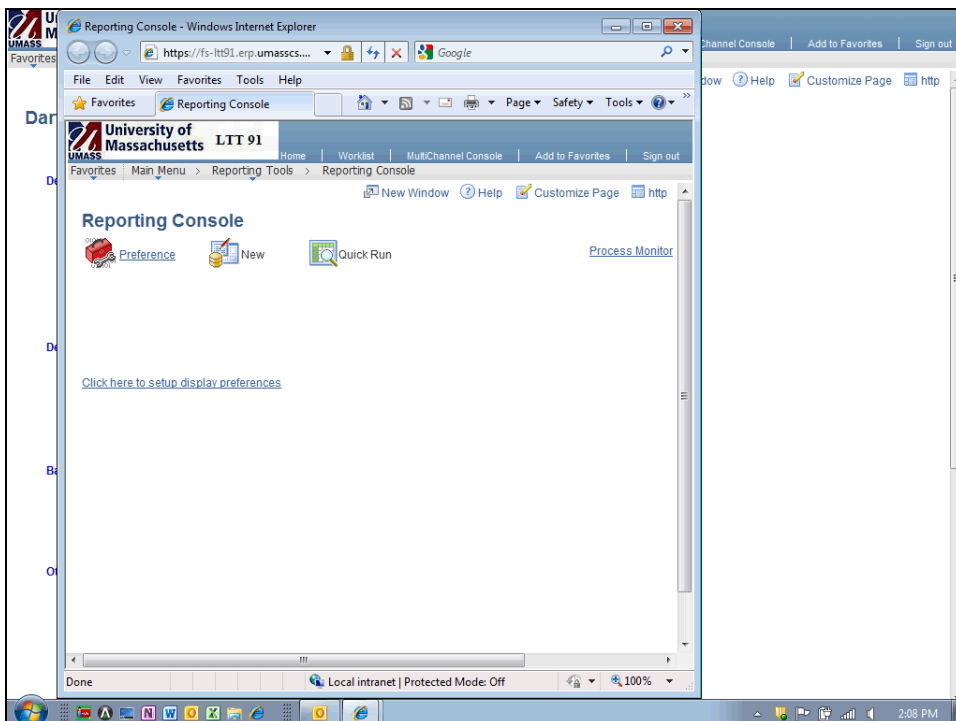
Your goal is to review the components of the Reporting Console.




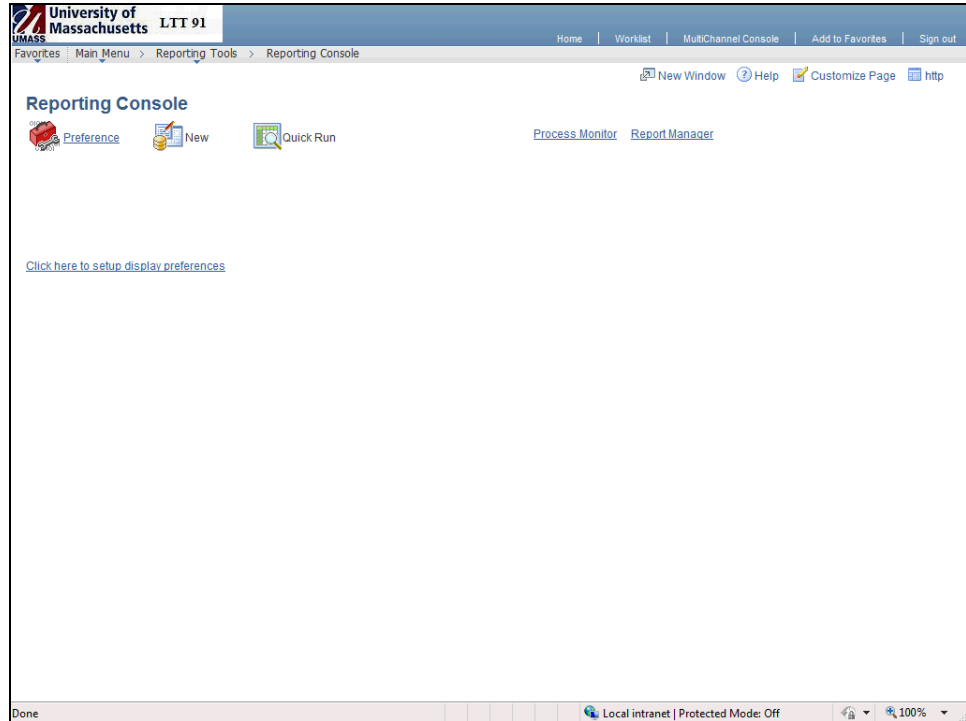
Step	Action
1.	<p>Begin by navigating to the Reporting Console page.</p> <p>Click the Main Menu button.</p> 
2.	<p>Click the Report Center menu.</p> 
3.	<p><i>Note:</i> An alternate navigation for the Reporting Console from the Main Menu is:</p> <p>Reporting Tools > Reporting Console.</p> <p>Click the Finance menu.</p> 
4.	<p>Once you arrive at the Report Center, there is a link for the Reporting Console at the top of the page.</p>



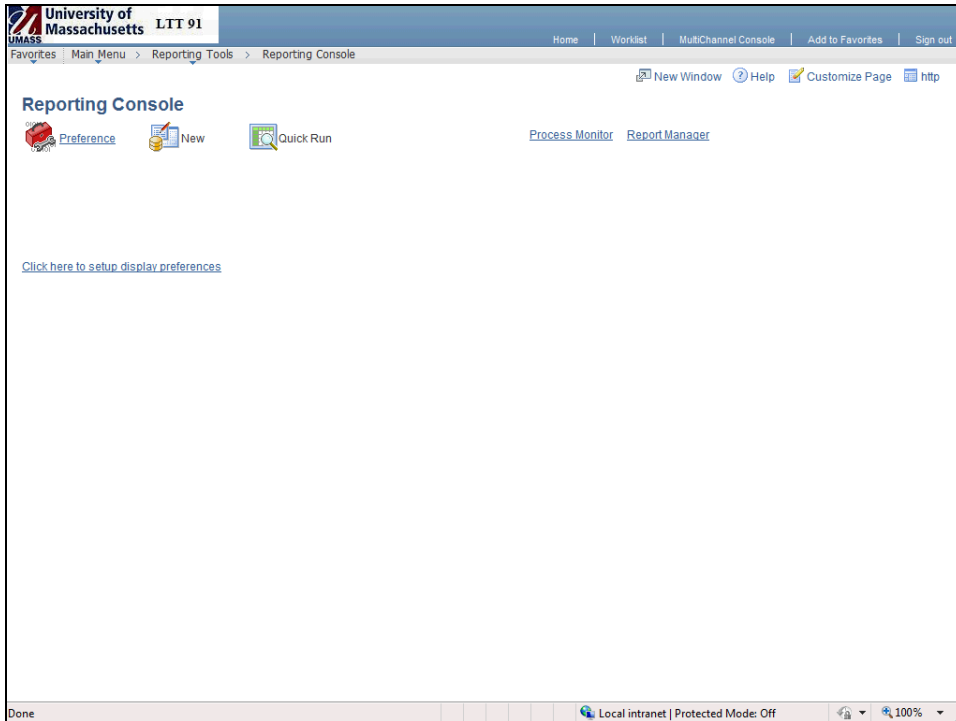
Step	Action
5.	Click the Reporting Console link. Reporting Console



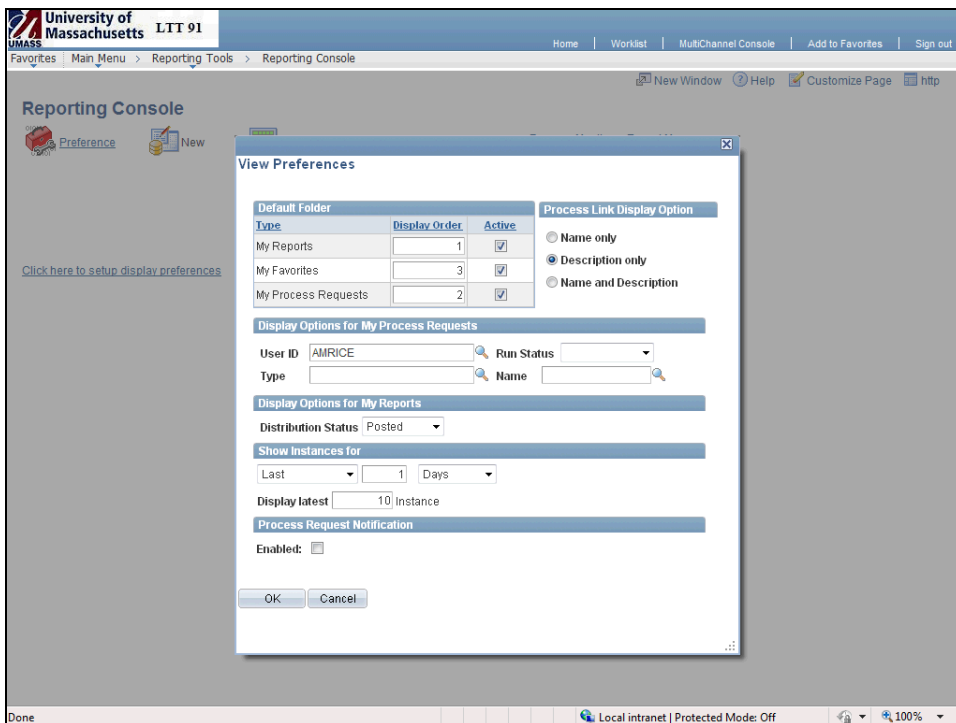
Step	Action
6.	Click the Maximize/Restore button. 






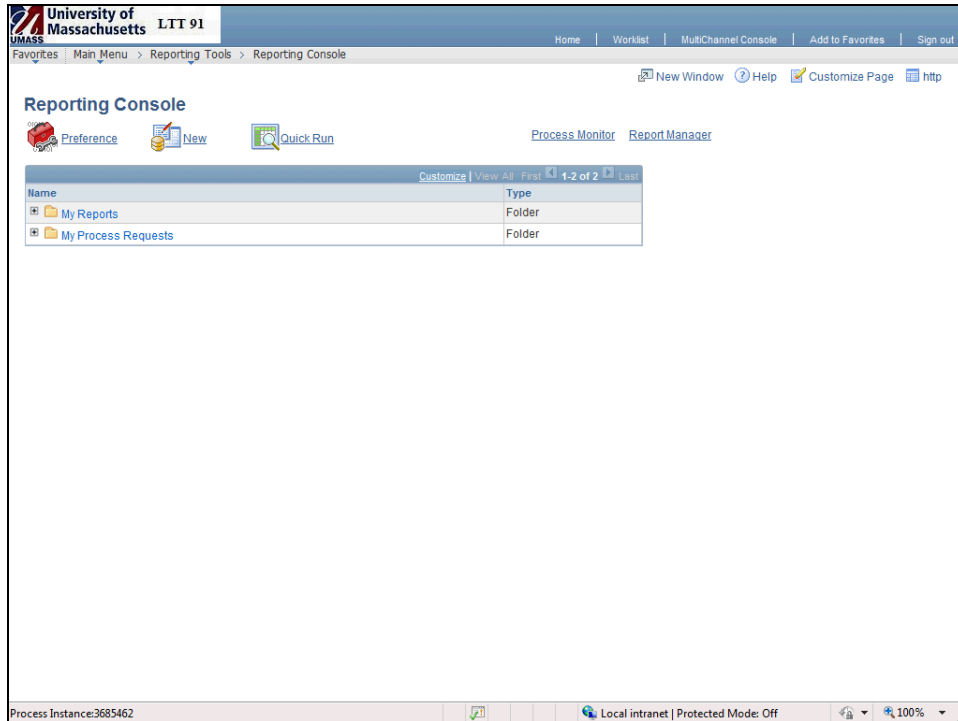
Step	Action
7.	While the Process Monitor and Report Manager are still options to use, the Reporting Console provides a streamlined presentation of both reports and processes. The Reporting Console allows you to view, monitor and organize your favorite reports and processes.
8.	You will notice there are five navigation links at the top of the page.
9.	The Preference link allows you to set your display preferences for reports and process requests.
10.	Because you can utilize the Report Center for the New and Quick Run functions, they are not recommended for use here on the Reporting Console .
11.	The Process Monitor and Report Manager links are the same as the ones you are familiar with on your Run Control pages.
12.	The first time you enter the Reporting Console , you need to setup your display preferences to view the folders for your reports and processes.



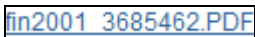


Step	Action
13.	Click the Click here to setup display preferences link. Click here to setup display preferences



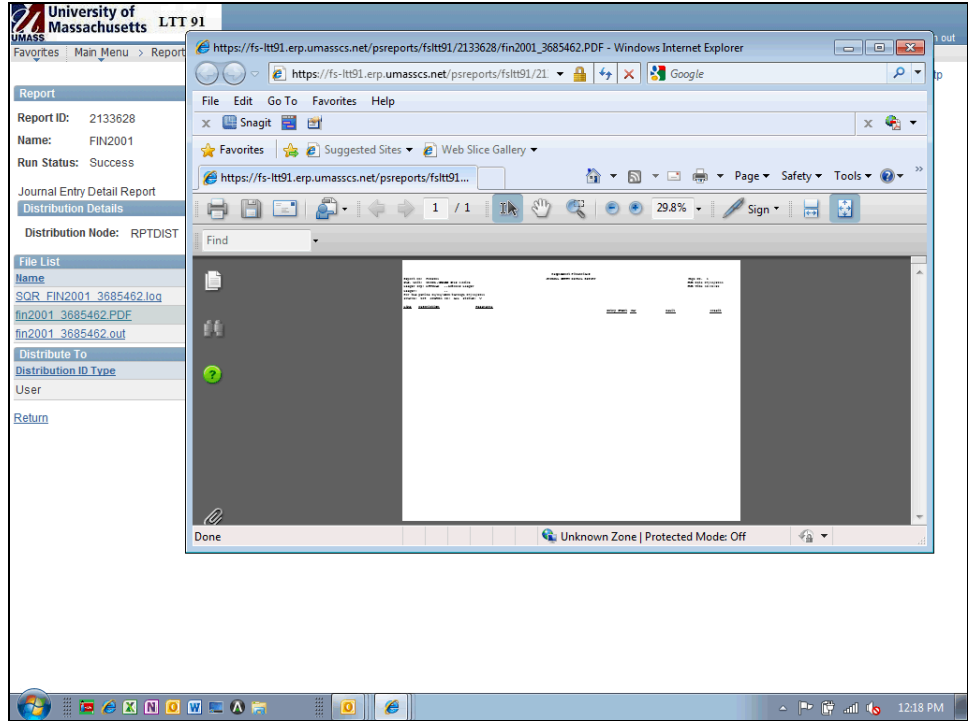
Step	Action
14.	The Default Folder box lets you select which folders you want to view and the order of them.
15.	<p>It is recommended to disable the favorites folder for the following reasons:</p> <ul style="list-style-type: none"> • You can save Favorites in the Main Menu. • You can save Favorites in the Query Viewer. • Other favorite reports can be found in the Report Center.
16.	<p>To disable the My Favorites folder, click the checkbox in the Active column.</p> 
17.	<p>The Process Link Display Option box lets you choose to see the process name, description, or both.</p> <p>In this scenario, you will choose both.</p>
18.	<p>Click the Name and Description option.</p> 
19.	<p>The Display Options for My Process Requests box lets you display your User ID, Run Status, Process Type, and/or Process Name.</p>
20.	<p>The Display Options for My Reports box lets you select the Distribution Status to display.</p>
21.	<p>The Show Instances For box lets you display these settings to folders where report and/or process instances are displayed.</p> <p>In this scenario, you will show instances that have processed for the last 10 days.</p>
22.	<p>Enter the desired information into the Number field.</p> <p>Enter "10".</p>
23.	<p>The Process Request Notification is a checkbox that lets you choose to receive a pop up confirmation message when a process is submitted.</p>
24.	<p>Click the OK button.</p> 



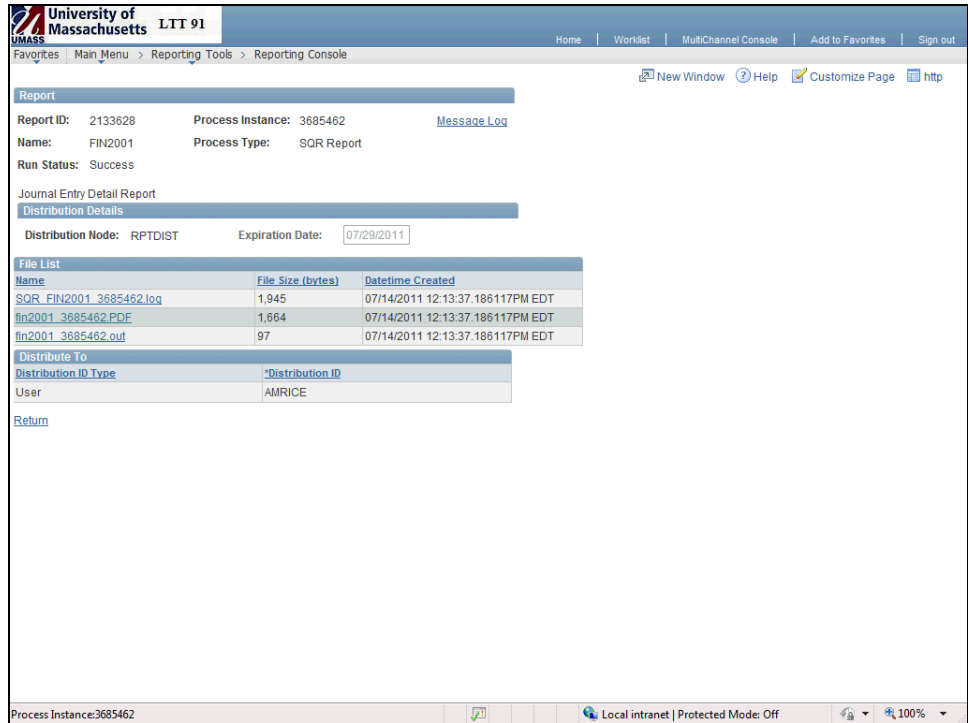
Step	Action
25.	Now that you have set up your folder preferences, you can access and monitor reports and processes in the displayed folders as necessary.
26.	The My Reports folder is intended to alert users to newly shared reports that are available. The system will populate this folder in chronological order with links to the reports.
27.	Click the Expand button on the My Reports folder. 
28.	For reports that have multiple outputs, the default output will be to the " Report Name " link (on this page it is 2133628 Journal Entry Detail R...). Alternate outputs will be posted to the View link. In this scenario, a PDF file is the default output.
29.	The report that displays is the Journal Entry Detail Report . Click the 2133628 Journal Entry Detail R... link. 
30.	Click the fin2001_3685462.PDF link. 



Instructor Manual

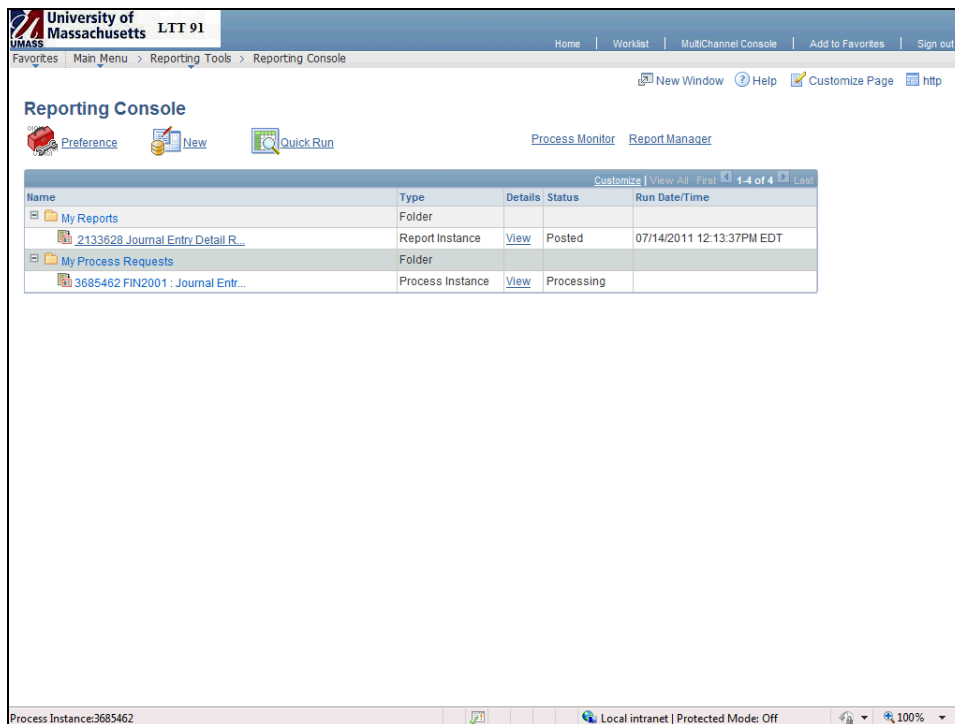
UMass e*mpac Reporting Console




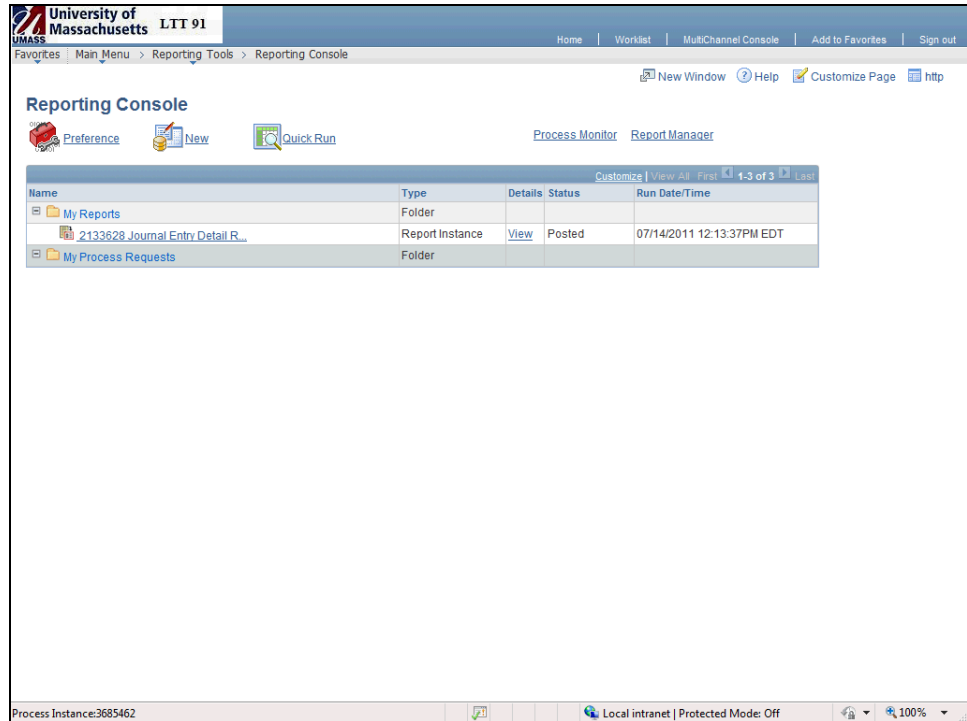
Step	Action
31.	Click the Close button.




Step	Action
32.	Click the Return link. 
33.	The My Process Requests folder provides a list of processes based on the preferences you define.
34.	Click the Expand button on the My Process Requests folder. 
35.	Like the Process Monitor , the values in the Status column will range from "Queued" to "Success". To see a change in the status column you need to refresh the grid. In the Process Monitor there is a Refresh button. In the Reporting Console you can refresh the status by collapsing and expanding My Process Requests folder.



Step	Action
36.	Click the Collapse button on the My Process Requests folder. 



Step	Action
37.	Click the Expand button again. 
38.	The Status is set to Success.
39.	Congratulations! You have successfully reviewed the components of the Reporting Console. End of Procedure.