

Viewing A Report on the Screen

Overview

The DPHS Accounting System offers many different reports within each application. Most of these reports can be printed to a printer and/or printed to the screen and/or printed to a file. The only exceptions are reports which are considered audit trails (such as posting journals) which require printing a "hard copy" to a printer and disallow a screen print.

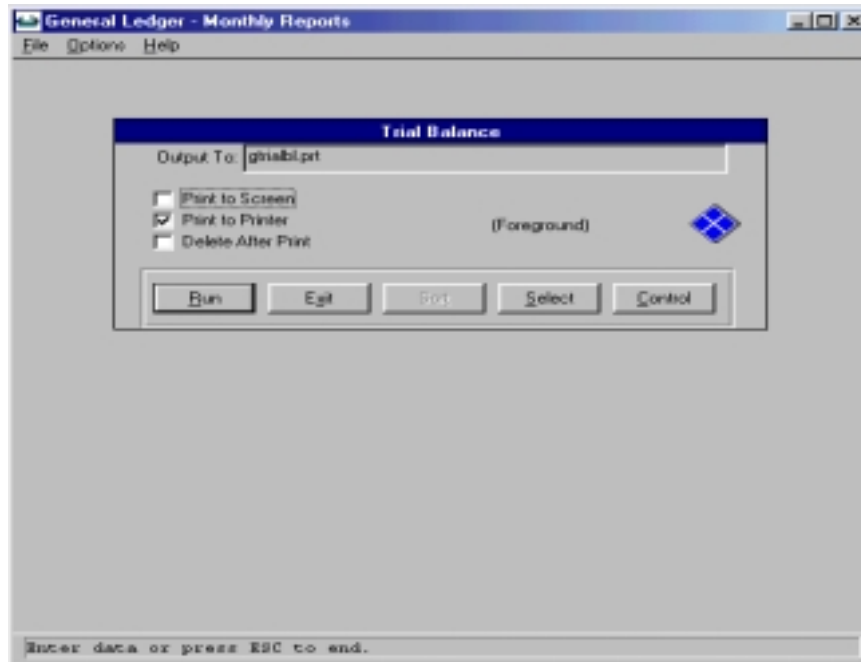
This Technical Note provides information on how to view a report on the screen and how to maneuver within a screen report. As always, key functions can be displayed by pressing <ALT-K> (5.x sites), <CTRL-K> (6.x sites), or <ESC-K> (UNIX) at any point in the process.

Steps

From the application's report menu, select the report desired. Some reports ask for input before displaying the '**Report Options**' screen. For example, the '**Trial Balance Report**' in '**General Ledger**' asks for the fiscal Month/Year, if MTD or YTD balances are desired and if you want to print accounts with zero balances. Once you have filled in these fields and press <F1> - 5.x sites or <F2> - 6.x sites, the '**Report Options Screen**' appears.

Payroll Check Reconciliation Report				
Execution	Foreground			
Output File	c:\linda\pchkrecon.prt			
		--- Print Options ---		
Screen?	N	Queue		
Print?	Y	Form	Default	
Delete?	N	Copies	1	Timing Now
		--- Submit Options ---		
Notify?	no		Log File	
Queue			Timing	Now
		--- Subheading ---		
		--- Report Options ---		
Run	Run Output Procedure			
Order	View/Modify Sort Order			
Select	View/Modify Record Selection			
Control	Control Output Options			

Version 5.x Report Options Screen



Version 6.x Report Options Screen

From the '**Report Options Screen**', choose '**Select**' if you want further selection before you run your report. Depending on the report being run, data can be limited to include only selected accounts, vendors, or other significant fields. After you are finished with your selection, press <F1> - 5.x sites or <F2> - 6.x sites to return to the '**Report Options Screen**'.

For 5.x sites, choose (C) for **Control**. This moves you into the upper portion of the screen, into the three fields for “**Screen**”, “**Print**”, and “**Delete**”. Change “**Screen**” to Y. The “**Print**” and “**Delete**” fields can be either Y or N. For 6.x sites, select which options, "**Print to Screen**", "**Print to Printer**", and/or "**Delete after Print**", you want to have done with your mouse. A check mark in the checkbox will perform that function. An unchecked checkbox will not perform that function. Press <F1> - 5.x sites or <F2> - 6.x sites to continue.

Choose **(R)** for **Run** from the '**Report Options Screen**'. The information is processed and the report is displayed to the screen. (If your selection criteria did not find any matching records, you will see a message "**0 records processed**" and you will be returned to the report menu.) When the report is displayed to the screen, the following keys can be used for maneuvering:

Function	UNIX Key	DOS\Windows Key
<i>Go</i> - Displays a window showing your answers to Print/Delete. Make changes to Y/N answers (if desired) and press <F1> again to execute and return to the menu.	<F1>	<F1> - 5.x sites or <F2> - 6.x sites
<i>Escape to previous/End Key</i> : Cancels task and returns to the reports menu. Any answers to Print or Delete are ignored.	<F4>	<ESC>
Move 5 positions to the right	<TAB>	<TAB>
Move 5 positions to the left	<CTRL-U>	<SHIFT>-<TAB>
First Line of Report	<ESC> <H>	Home
Last Line of Report	<ESC> <Z>	End
Previous Page	<CTRL>-<P>	Page Up
Next Page	<CTRL>-<N>	Page Down
One position at a time	Arrow keys	Arrow keys
Left Margin	<ESC> ←	<CTRL>- ←
Right Margin	<ESC> ⇒	<CTRL>- ⇒ - 5.x sites or <END> - 6.x sites

You can also search through the report for a specific value such as an invoice number, vendor name or an amount. Simply type the value (called the search string) and you will see a box at the bottom of your screen with the search string displayed as you type.

Press **<ENTER>** and the first occurrence of the search string is found. The record in which it is found is now the top one displayed on your screen. You can press **<ENTER>** again to continue searching for additional occurrences of the search string or press any cursor keys except **<F4>** (which will end the report) to stop the search.