New FIS Reports

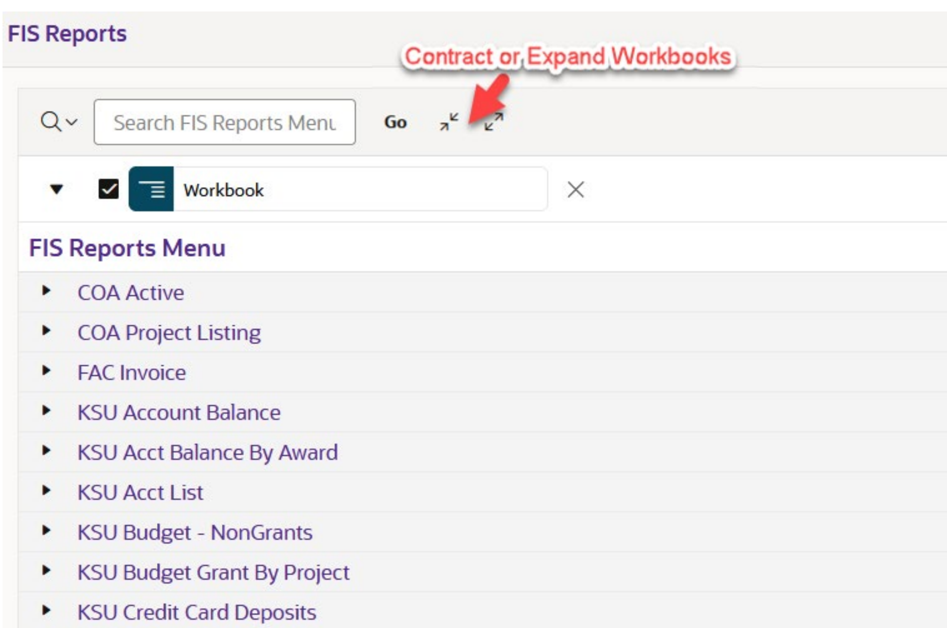
How-To Guide

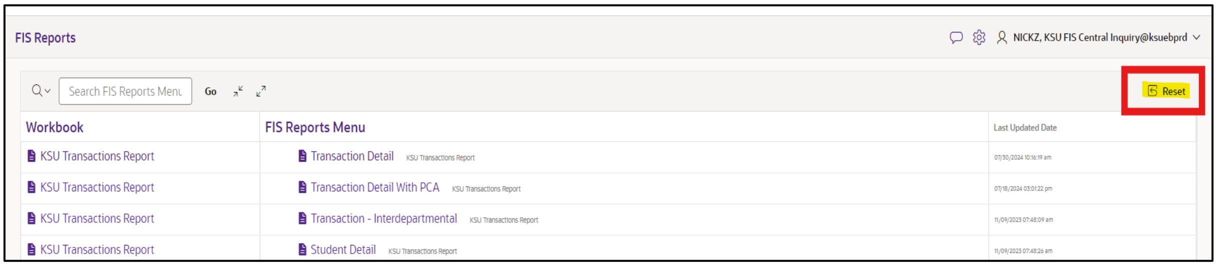
The following is provided to assist users in conveniently accessing the FIS reports in the Oracle APEX software.

1. First, log into FIS (https://fis.ksu.edu) using your eID and password.

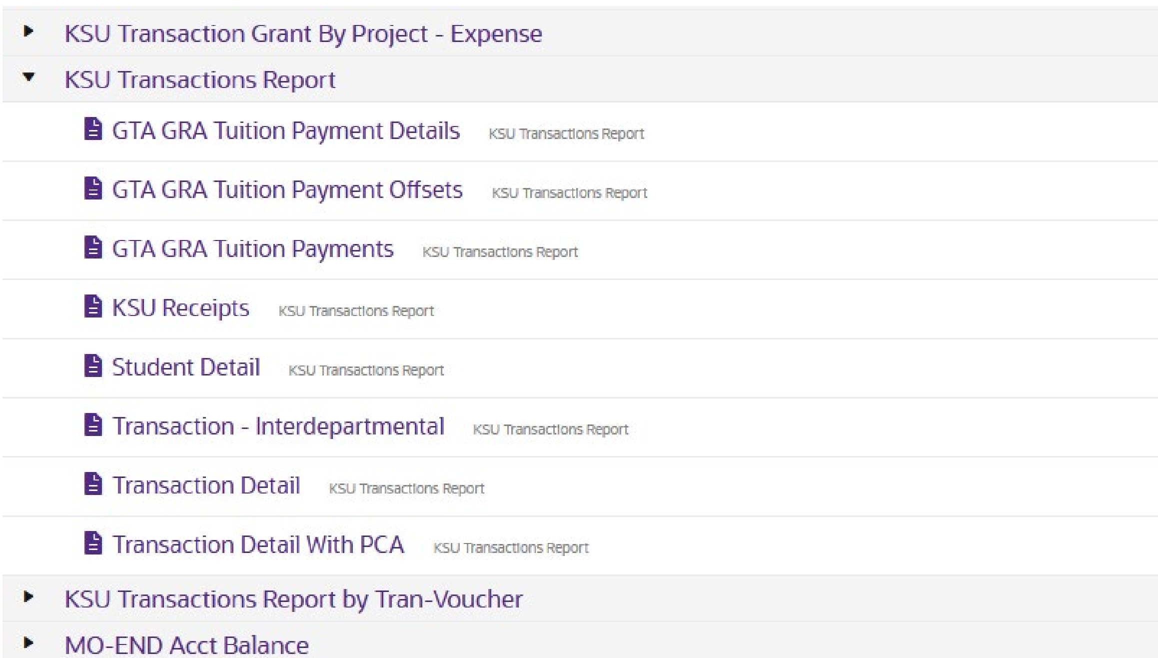
2. The Oracle Applications Home Page appears. Select the KSU FIS User hyperlink on the left side of the screen to expand it. Now select the “**Reports”** link from within the choices provided.

3. The FIS Reports Menu and ‘Workbook’ listing will appear where the listing can be viewed in two ways: collapsed or expanded. If at any point the workbook listing appears to change format, the “Reset” button in the top right of the screen can be selected to revert the screen back to its default settings.

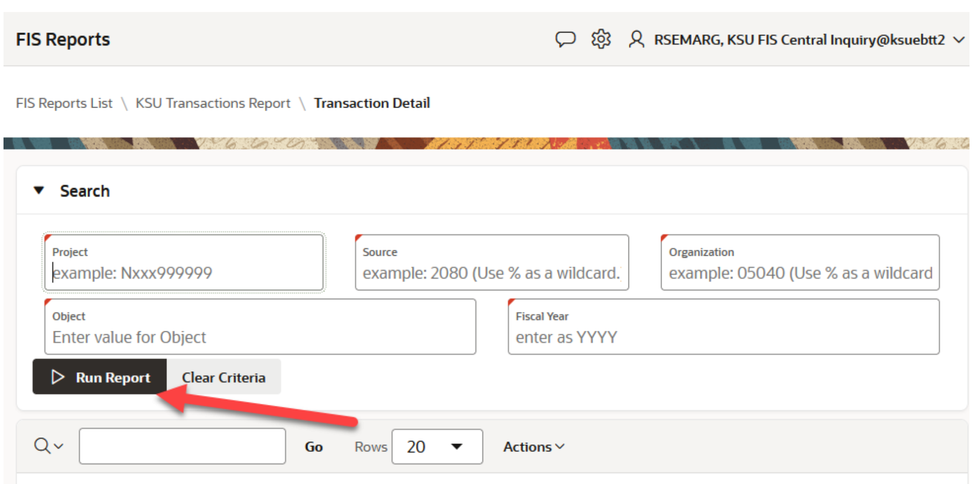




4. Scroll down to the desired workbook and click on its arrow to the left. This will expand the Workbook to show the Worksheets available. In this case the "**Transaction Detail**" worksheet has been selected from the "**KSU Transactions Report**" workbook.

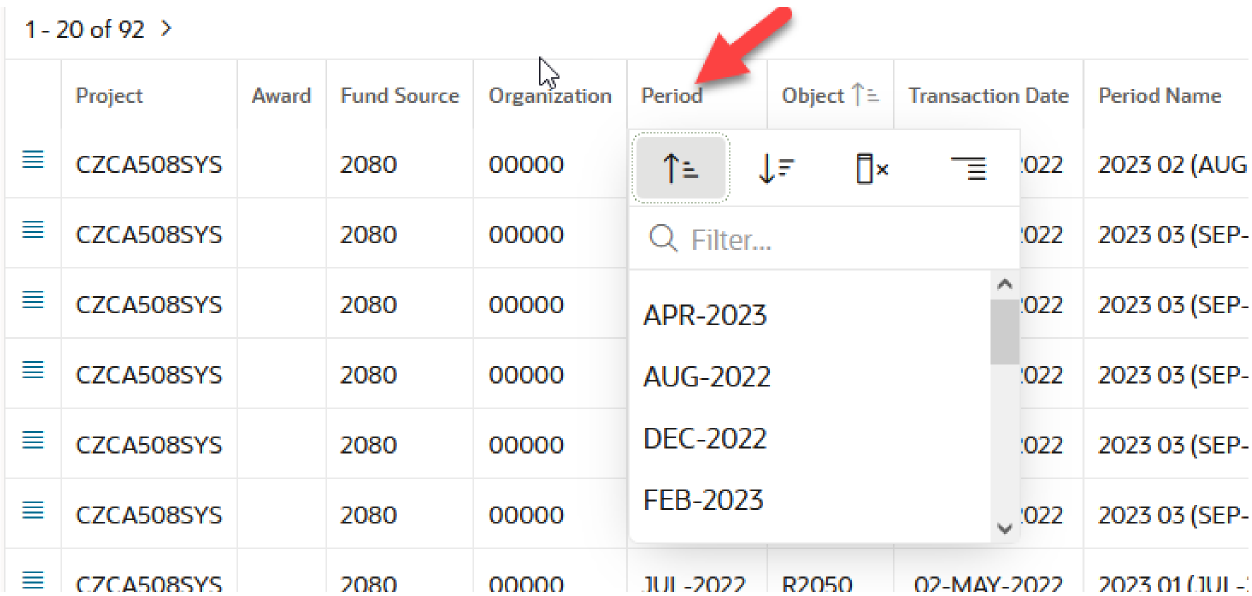


5. This opens up the search parameters listing where specific search terms can be entered – remember, the percent sign (%) is a wildcard if all results are desired. Required fields are indicated with a red triangle in the upper left corner of the field. Once all parameters have been entered, click on the **Run Report** button.

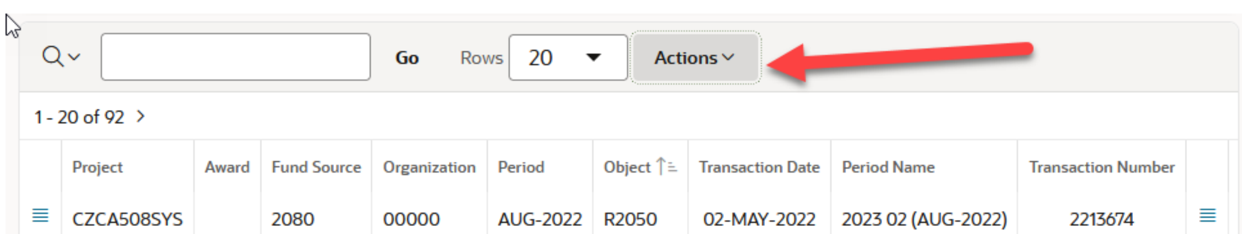


6. The report will now show the results below... If there are no results found, the report will display that no data is available.

7. Each column heading has a menu attached which can be used to sort, hide, or create a “control break” that will sort all data by that column category. In the “Sort” case, the **Period** column has been selected with the available months shown. The sort order can be selected along with any filters available. If a filter is selected, the report will refresh showing only the transactions that apply to that filter.

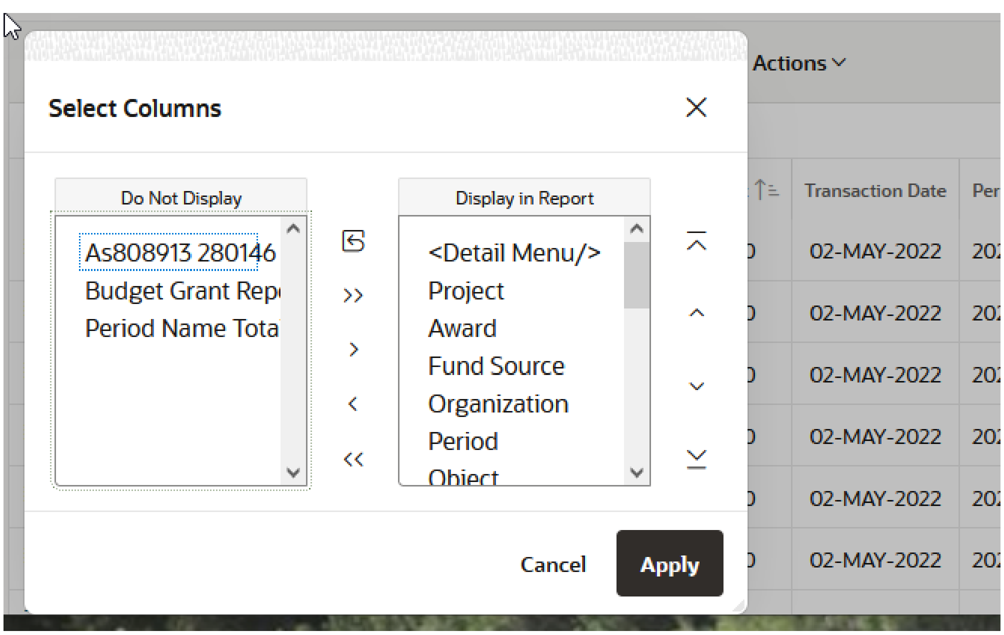


8. At at the top of the report is an “**Actions”** button. This button provides various methods of organizing and arranging the data within the report. For now let’s adjust the columns. To begin, click on the “**Actions**” button and select “**Columns**” from the top of the menu that appears.



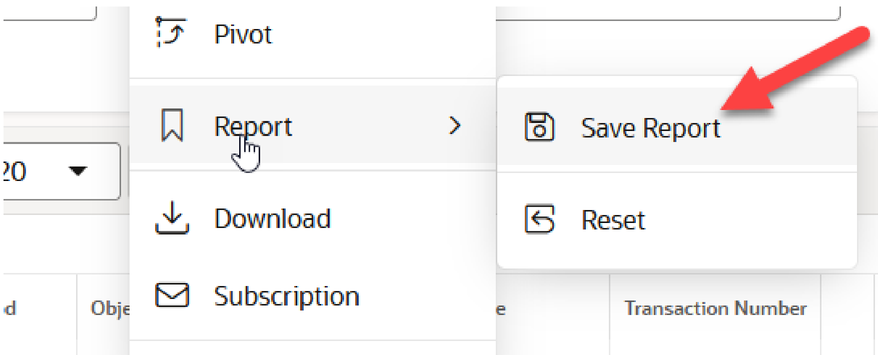
The Actions menu:

9. The "**Select Columns**" menu now opens. Any of the column categories in the right window can be selected and moved up, down, to the top, or bottom with the use of the arrows on the right side. For example, by selecting Award in the right hand display, and then using the up arrow to the right, it can be moved above Project and will appear to the left of Project in the report. Likewise, moving a category down will have it appear to the right in the report. In the middle of the two windows, are symbols to: "Reset", "Add All", "Add One", "Remove One" and "Remove All" column categories. Once all modifications are complete, click the "Apply" button in the bottom right.

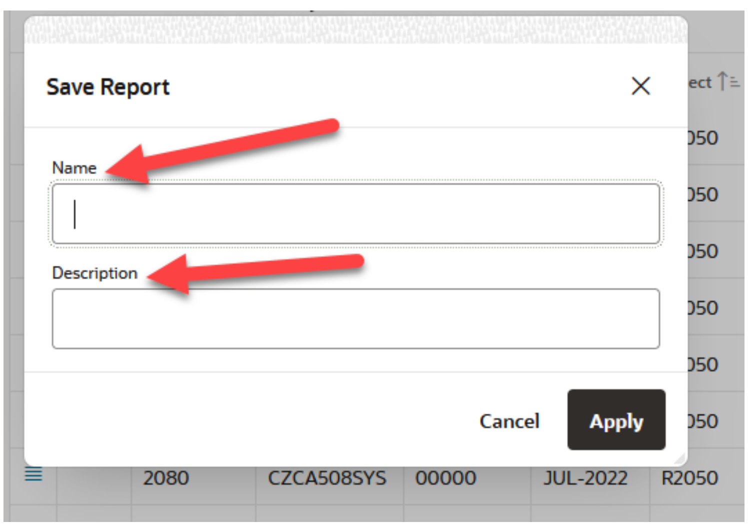


10. The columns have been re-arranged.

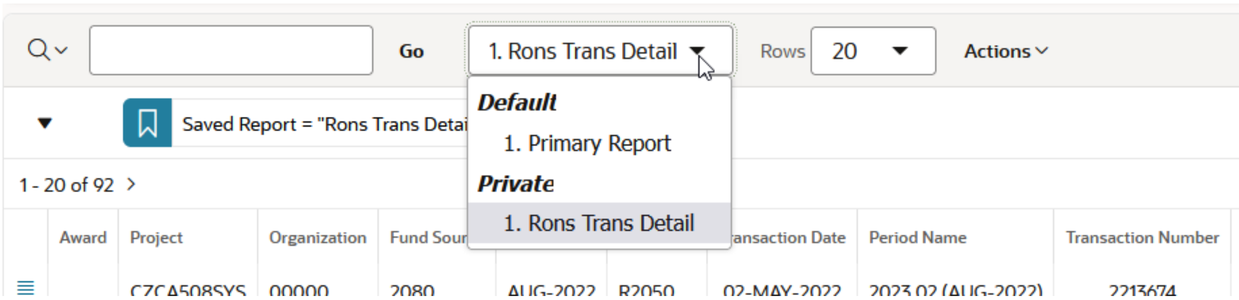
11. A report format can also be saved so the aforementioned modifications do not need to take place every time. Within the "**Actions**" button menu, select **Report**. Select **Save Report**.



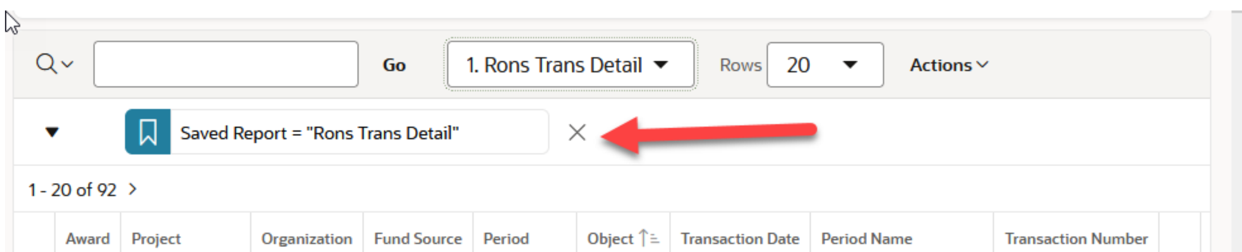
12. A pop-up menu will appear that allows a name and description to be entered for the newly formatted Worksheet.



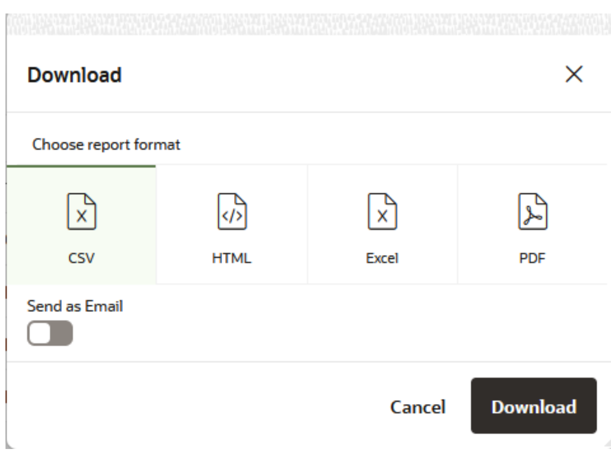
13. Once the report has been saved, it can be accessed at any time by clicking on the box showing primary or the new report name.



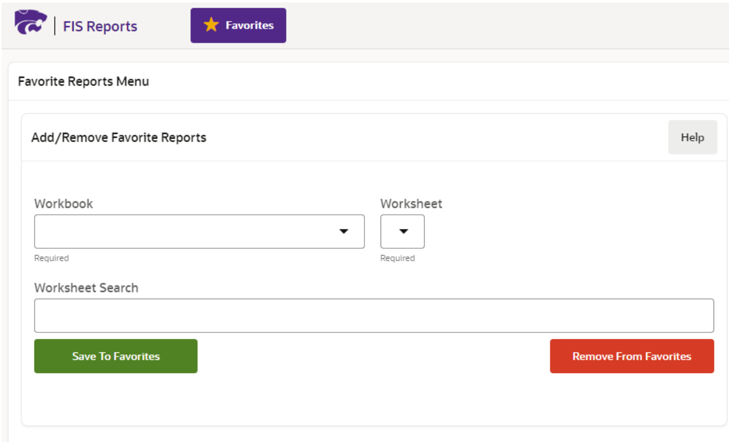
14. To delete a saved report format, click on the 'X' next to the 'Saved Report = …..' item. A user cannot delete any default report or a report created by another user – only those custom reports created by the user themselves.



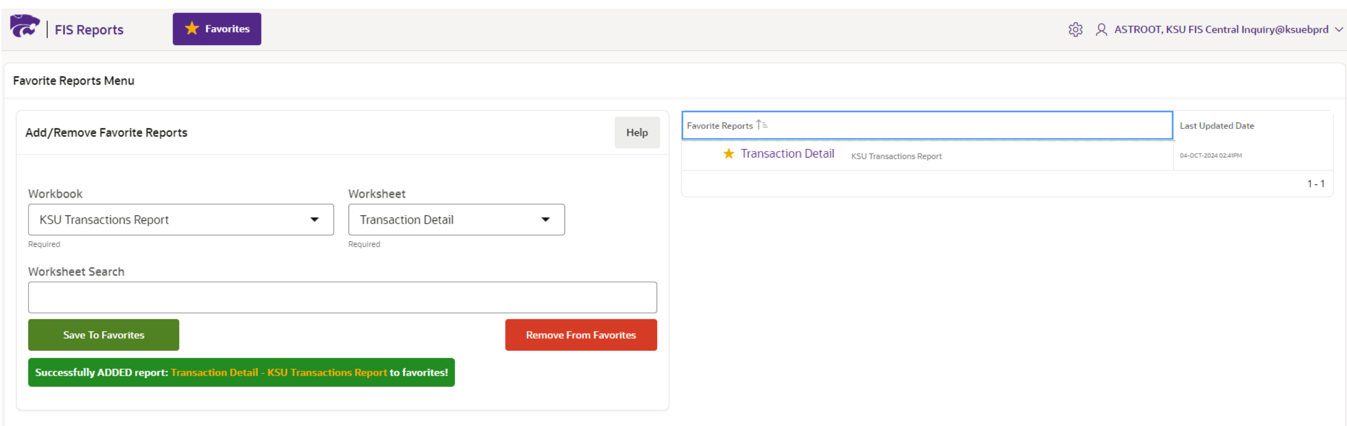
15. To export a report, click on the **Actions** menu and select **Download**. Multiple formats will be presented:
    i. CSV: an unformatted Excel file
    ii. HTML: a formatted web page that you can open in your browser
    iii. Excel: a formatted Excel spreadsheet
    iv. PDF: a formatted PDF ideal for printing



16. The Favorites Menu allows you to create a list of your favorite reports. Click on the **Favorites** button to display the menu.

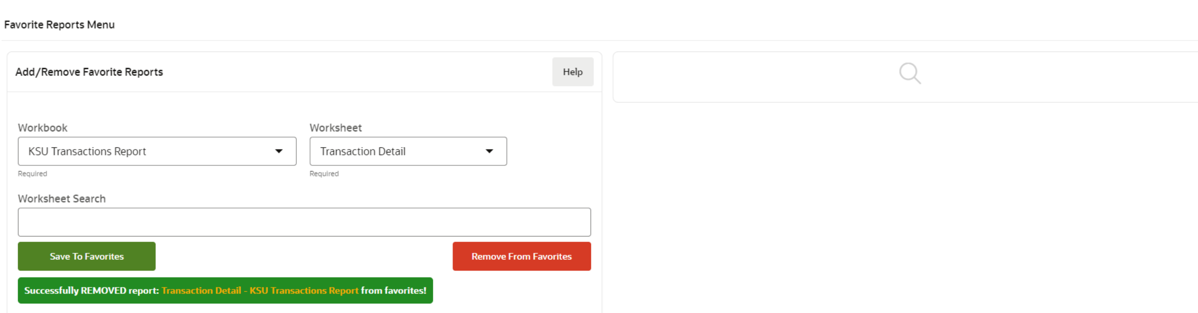


17. Select a workbook/worksheet combination from the dropdown list or type a search parameter in the search box to find a particular worksheet. In this case, I have selected the **Transaction Detail** worksheet from the dropdown list. Click on the **Save to Favorites** button to add the worksheet to your list of favorites.



18. The Transaction Detail report now shows as a Favorite Report on the right hand side.

19. To remove a report from your list, repeat the process and click on the **Remove From Favorites** button.



For additional information or questions, please feel free to contact the Division of Financial Services Systems team (Ron Semarge, Aaron Stroot).