

New FIS Reports

How-To Guide

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

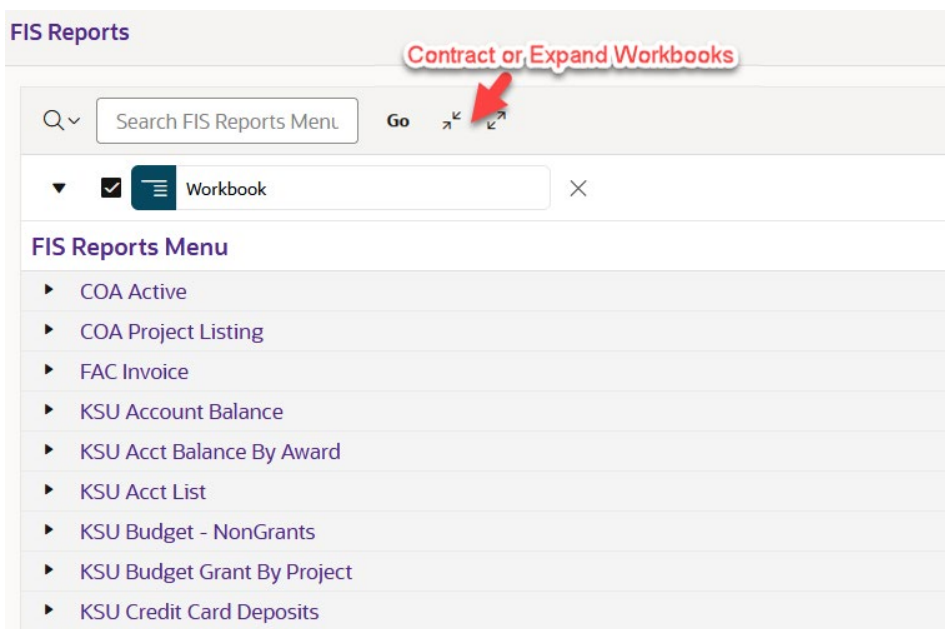
1. First, log into FIS (<https://fis.ksu.edu>) using your eID and password.



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.



FIS Reports NICKZ, KSU FIS Central Inquiry@ksuebprd

Search FIS Reports Menu Go ⌂ ⌕ Reset

Workbook	FIS Reports Menu	Last Updated Date
KSU Transactions Report	Transaction Detail KSU Transactions Report	07/30/2024 02:16:19 am
KSU Transactions Report	Transaction Detail With PCA KSU Transactions Report	07/16/2024 03:01:22 pm
KSU Transactions Report	Transaction - Interdepartmental KSU Transactions Report	11/09/2023 07:48:59 am
KSU Transactions Report	Student Detail KSU Transactions Report	11/09/2023 07:48:26 am

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.

▶ KSU Transaction Grant By Project - Expense

▼ KSU Transactions Report

- 📄 GTA GRA Tuition Payment Details KSU Transactions Report
- 📄 GTA GRA Tuition Payment Offsets KSU Transactions Report
- 📄 GTA GRA Tuition Payments KSU Transactions Report
- 📄 KSU Receipts KSU Transactions Report
- 📄 Student Detail KSU Transactions Report
- 📄 Transaction - Interdepartmental KSU Transactions Report
- 📄 Transaction Detail KSU Transactions Report
- 📄 Transaction Detail With PCA KSU Transactions Report

▶ KSU Transactions Report by Tran-Voucher

▶ MO-END Acct Balance

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.

FIS Reports RSEMAR, KSU FIS Central Inquiry@ksuebtt2

FIS Reports List \ KSU Transactions Report \ Transaction Detail

▼ Search

Project ▲

Source ▲

Organization ▲

Object ▲

Fiscal Year ▲

▶ Run Report
Clear Criteria

Q Go Rows 20 Actions

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.

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	Project	Award	Fund Source	Organization	Period	Object ↑≡	Transaction Date	Period Name
≡	CZCA508SYS		2080	00000	↑≡	↓≡	✕	≡
≡	CZCA508SYS		2080	00000	Filter...			2022 2023 02 (AUG-
≡	CZCA508SYS		2080	00000	APR-2023			2022 2023 03 (SEP-
≡	CZCA508SYS		2080	00000	AUG-2022			2022 2023 03 (SEP-
≡	CZCA508SYS		2080	00000	DEC-2022			2022 2023 03 (SEP-
≡	CZCA508SYS		2080	00000	FEB-2023			2022 2023 03 (SEP-
≡	CZCA508SYS		2080	00000	JUL-2022	R2050	02-MAY-2022	2023 01 (JUL-)

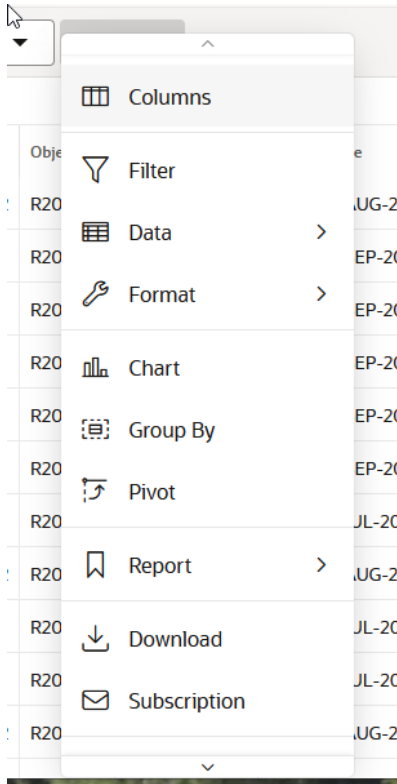
8. At the top of the report is an “**Actions**” button. This button provides various methods of organizing and arranging the data within the report. For now let’s adjust the columns. To begin, click on the “**Actions**” button and select “**Columns**” from the top of the menu that appears.

Q~ Go Rows 20 ▾ Actions ▾

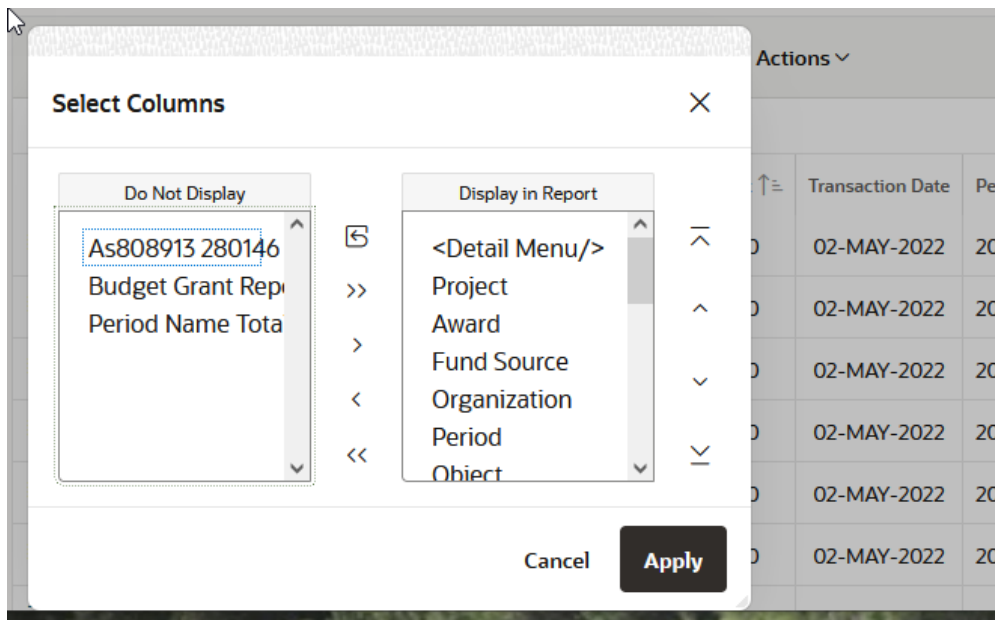
1 - 20 of 92 >

	Project	Award	Fund Source	Organization	Period	Object ↑≡	Transaction Date	Period Name	Transaction Number
≡	CZCA508SYS		2080	00000	AUG-2022	R2050	02-MAY-2022	2023 02 (AUG-2022)	2213674

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.

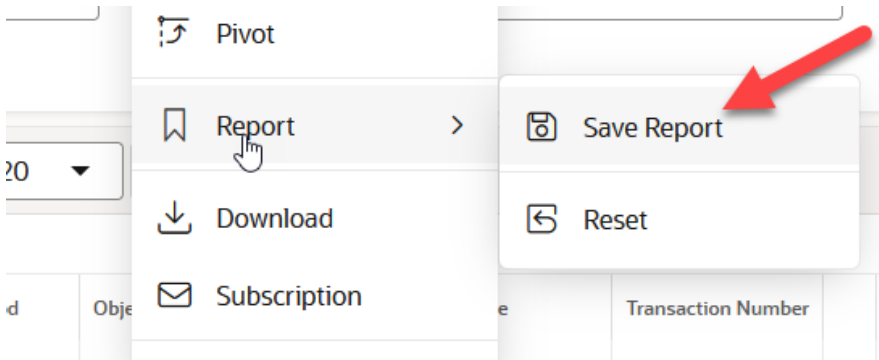


10. The columns have been re-arranged.

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	Award	Project	Organization	Fund Source	Period	Object ↑	Transaction Date	Period Name	Transaction Number	
≡		CZCA508SYS	00000	2080	AUG-2022	R2050	02-MAY-2022	2023 02 (AUG-2022)	2213674	≡

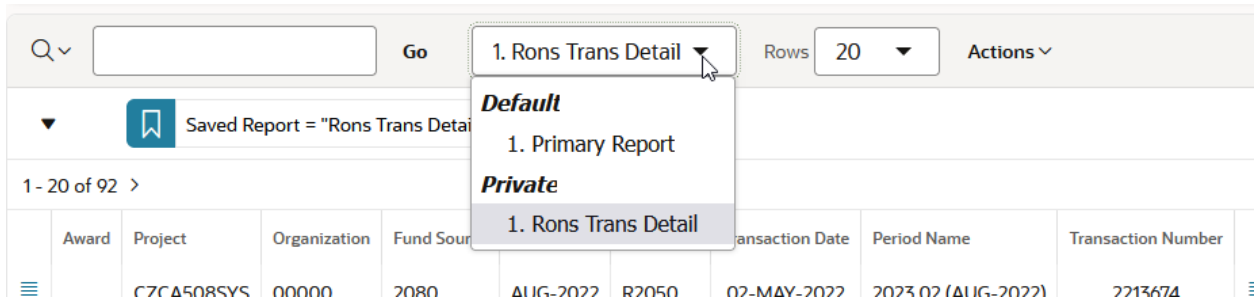
11. A report format can also be saved so the aforementioned modifications do not need to take place every time. Within the “**Actions**” button menu, select **Report**. Select **Save Report**.



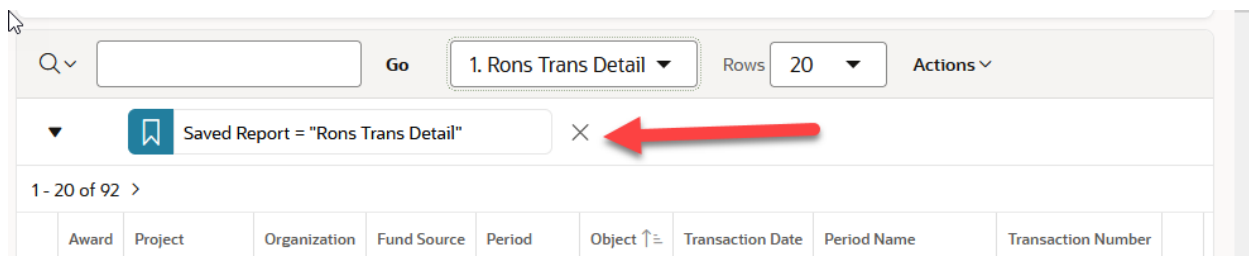
12. A pop-up menu will appear that allows a name and description to be entered for the newly formatted Worksheet.

A screenshot of a 'Save Report' pop-up form. The form has a title bar with a close button (X). It contains two text input fields: 'Name' and 'Description'. Red arrows point to each of these fields. At the bottom right of the form are two buttons: 'Cancel' and 'Apply'.

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.

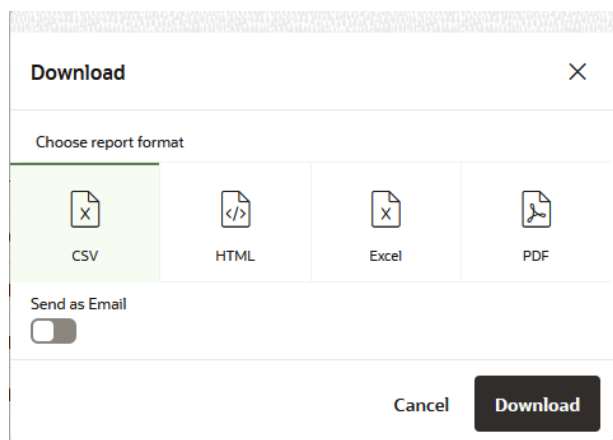


14. To delete a saved report format, click on the 'X' next to the 'Saved Report =' item. A user cannot delete any default report or a report created by another user – only those custom reports created by the user themselves.



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.

The screenshot shows the 'Favorite Reports Menu' interface. At the top, there is a navigation bar with 'FIS Reports' and a 'Favorites' button. Below this, the 'Favorite Reports Menu' section contains a 'Help' button and an 'Add/Remove Favorite Reports' section. This section has two dropdown menus: 'Workbook' and 'Worksheet', both marked as 'Required'. Below these is a 'Worksheet Search' text box. At the bottom of the section are two buttons: 'Save To Favorites' (green) and 'Remove From Favorites' (red).

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.

This screenshot shows the 'Favorite Reports Menu' after a report has been added. The 'Workbook' dropdown is set to 'KSU Transactions Report' and the 'Worksheet' dropdown is set to 'Transaction Detail'. A green message box at the bottom states: 'Successfully ADDED report: Transaction Detail - KSU Transactions Report to favorites!'. On the right side, a table titled 'Favorite Reports' shows the added report. The table has columns for 'Favorite Reports', 'Last Updated Date', and a page indicator '1 - 1'. The row shows a star icon, 'Transaction Detail', 'KSU Transactions Report', and a date '09-OCT-2024 02:40PM'.

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.

This screenshot shows the 'Favorite Reports Menu' after a report has been removed. The 'Workbook' dropdown is set to 'KSU Transactions Report' and the 'Worksheet' dropdown is set to 'Transaction Detail'. A green message box at the bottom states: 'Successfully REMOVED report: Transaction Detail - KSU Transactions Report from favorites!'. On the right side, there is a search bar with a magnifying glass icon.

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