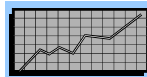


REPORTS TRACKER USER'S GUIDE

INTRODUCTION

This guide provides basic information on **Reports Tracker** software. Reports Tracker is browser-based software that uses your default Internet browser. For users who do not have access to the Internet, a Reports Tracker icon (shown below) will be installed on all workstations as an internal Intranet site for Madison Avenue Publications.



Reports Tracker

NOTE ⇒ For Reports Tracker software questions, logon errors, and forgotten passwords, contact the Madison Avenue Publications Help Desk.

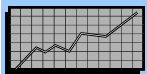
LOGGING ON/OFF

Perform the following steps to logon to Reports Tracker:

1. Access the *Reports Tracker Login* screen in one of two ways:

- Open your Internet browser. In the Address box, enter the URL **nt42wb/rptstrkr** and click **Go** or press **Enter**.

-or-

- Click the  icon on your desktop.

Reports Tracker

2. In the logon window, enter **rptraining** as both the *User name* and the *Password* to access a training version of Reports Tracker or your **employee number** and the Reports Tracker password e-mailed to you by the Security Department. Then click **Go**.

NOTE ⇒ Both the *User name* and *password* are case sensitive.

To logoff, in the Reports Tracker menu, from the *View* dropdown list, select **Log off**.

IMPORTANT ⇒ Since only a limited number of Reports Tracker sessions are available at a given time, the system will time-out if you leave the program idle for more than 20 minutes. When you are finished using Reports Tracker, be sure to logoff.

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NAMING CONVENTION FOR REPORTS

To find reports in Reports Tracker, you must understand the naming conventions used. All reports are identified by the following five characteristics:

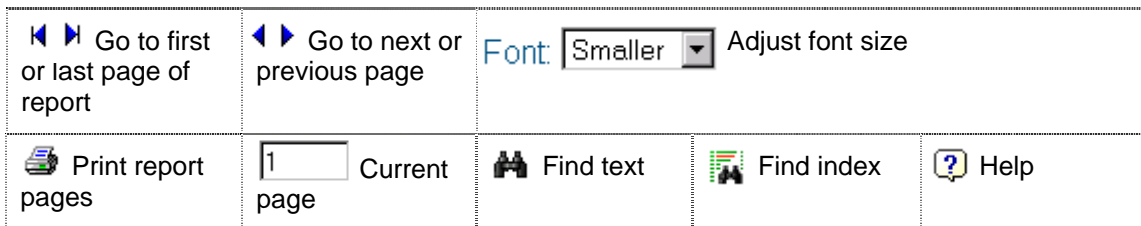
- **Report Name** - Up to six characters that name a report. Report names can contain only numbers, letters, and these special characters: @, #, \$. Multiple reports can have the same report name to group a set of reports used for one purpose or used by one department. You can use the extension to distinguish reports within a group.
- **Title** – Up to 20-character title of the report.
- **Extension** - 10-character report identifier that further defines a report name.
- **Effective Date** - A date within the report text that differentiates versions of a report. This indicates the date for which the report information is valid.
- **Time/Date Stamp** - Date that this report was introduced and processed into the Reports Tracker system.

You can search for a report, by any of the above. Using the *Expand (+)* and/or *Collapse (-)* feature, drill down to *Title, Report Name, Extension, Effective Date; Date/Time stamp* of the report you want to find.

NAVIGATING IN REPORTS TRACKER

When you open a report, Reports Tracker displays the *Report Toolbar*, along with the *Report name, Extension, Effective date, Timestamp, and Number of report pages*.

When you place the mouse over an icon on the toolbar, a popup message will tell you the function of the icon. These functions are:




SEARCHING REPORTS

In Reports Tracker, you can search either by text or by index, and can perform a search either *inside* the report using the *Report Toolbar* (binocular icon) or *outside* the report using the *Menu Bar Search* dropdown.

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Searching Inside the Report

Perform the following steps to do an **index** search inside a report:


1. Open the report in which you want to do the search.
2. From the *Report* toolbar, click the small binocular icon. 
3. Select an *Index name* from the dropdown list and input the *Index value*.
4. Enter the maximum number of results (*hits*) you want to see.
5. Click **Find**.
6. A list of matches will show in the lower, left pane of the screen. Scroll to the bottom of this list and click **More** to see more matches.
7. Click to highlight (in yellow) the one you want to find in the report. The match will be highlighted (in red) in the report in the right pane of the screen.

NOTE ⇒ A complete manual would contain actual screen captures with callouts to identify items discussed in the procedure, as well as the steps and screens used in **Searching Outside a Report**.

Remember the following when performing an index search inside a report:

- When searching by an index value, the *hit* list will show only entries starting with that value. The first number shown best matches your search request.
- Once the *hit* list appears, select and highlight (yellow) the value for which you are searching to link to that item on the report.
- The details of your search link and the number of pages in the document are displayed in blue text just above the *Report* toolbar.
- Do not include commas or decimals. (Example: 387345, not 3,873.45)
- When closing an Index search, be sure click only the **X** in the *Index Search* window, NOT on the Internet Explorer tool bar.
- Whenever you are inside a report, pressing **F5** will refresh the page.

Perform the following steps to do a **text** search inside a report:

1. Open the report in which you want to do the search.
2. From the *Report* toolbar, click the large binocular icon. 
3. In the *Search type* box, select either *Text* or *Integers*. (*Text* is recommended, even when searching for numbers.)

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4. Type the text for which you want to search. You must type the text exactly as it appears on the report, i.e., cashbox, not cash box.
5. Click to deselect *Match case*.
6. The *Begin search on page* box tells on which page of the report the search will begin. If desired, set the page number on which to begin the search, the maximum number of pages to search, and the maximum number of results to be displayed. Otherwise, you can leave these at the default settings of 1, 1000, and 250 as shown below.
7. Click **Go**.
8. A *hit* list of matches will show in the lower, left pane of the screen. Scroll to the bottom of this list and click **Next 250 pages** to see more matches.
9. Click to highlight (in yellow) the one you want to find in the report. The match will be highlighted (in red) in the report in the right pane of the screen.

Remember the following when performing a text search inside a report:

- When searching by text, you must type the text exactly as it appears in the report.
- Once the *hit* list appears, select and highlight (yellow) the value for which you are searching to link to that item on the report.
- The details of your search link and the number of pages in the document are displayed in blue text just above the *Report* toolbar.
- When searching for dollar values, be sure to include commas or decimals (e.g., 3,873.45, not 387345).
- After each search, press **F5** to return *Begin search on page* to page 1. Whenever you are inside a report, pressing **F5** will refresh the page.
- When closing an Index search, be sure click only the **X** in the *Index Search* window, NOT on the Internet browser tool bar.
- If you scroll too fast and get to the end of the report, click the Internet browser back arrow.

PRINTING REPORTS

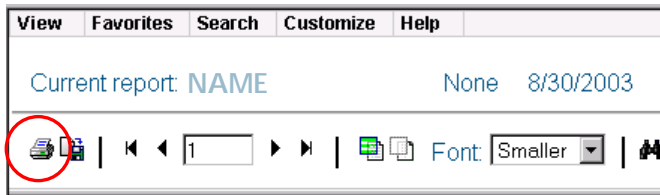
Using the browser print feature allows you to print only what is currently visible on the screen. Reports Tracker includes a **Print** button in the *Report* toolbar that provides you with additional print options: you can print the current page, all pages, or a range of pages. You can also change the font settings for the report (not recommended).

When printing the results of a search, you can print export the entire list of reports found, or just the pages on which your search criteria was found.

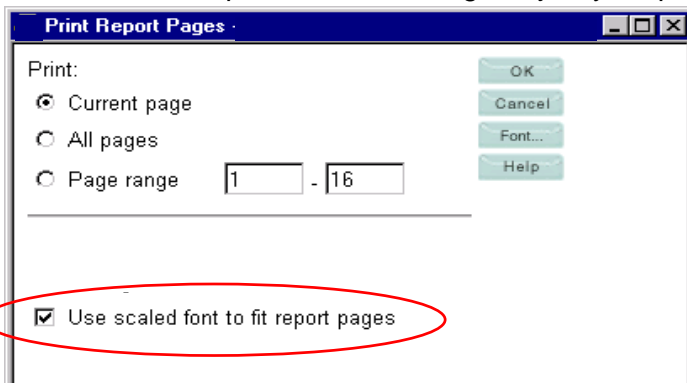
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To print from Reports Tracker:

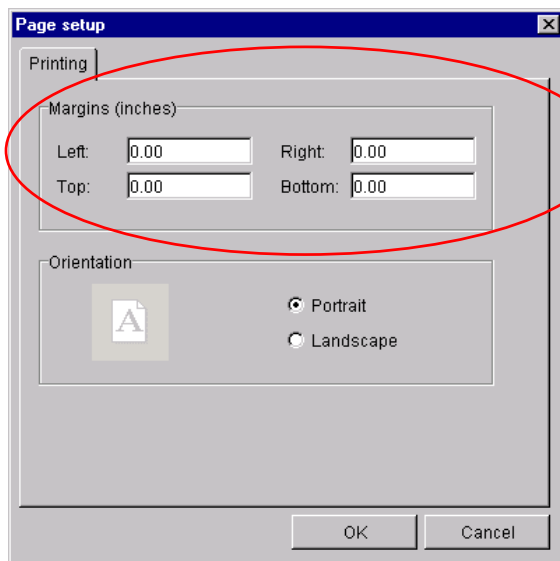
1. Open a report.
2. Click the printer icon to open the *Print Report Pages* window.



3. Select the pages to print: *Current page*, *All pages*, or a *Page Range*.
4. Select *Use scaled font to fit report pages*, then click **OK**.
5. Click **OK** to open the *Print* dialog. Adjust your print settings as necessary and click **Print**.



6. On the *Page Setup* screen that opens, change the margins to all zero, then click **OK**.



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MOST USED REPORTS

Reports Tracker allows you to create a shortcut to a report or a fully or partially filled out search form and quickly open most often used reports and search forms by selecting them from the *Most Used Reports* window using the Reports Tracker menu bar.

NOTE ⇒ A complete manual would contain steps for *Saving, Viewing, and Organizing Most Used Reports* with screen captures and callouts to identify items discussed in the procedure.

OTHER TOPICS

Other topics included in a complete manual would include:

- **Exporting Reports**
- **Using Notes**
- **Viewing a Report History**
- **Changing your Password**
- **Using Help**
- **Other Resources for Assistance**
- **Logging Off**