
Advantage Month-End Packets & Reports Reference Guide

*Control-D WebAccess	p.2
*611E Advantage Web Report	p.12

Financial Services & OPS Applications Support

Control-D WebAccess can be accessed at: <https://reports.asu.edu>.

Id and Password: ASURITE User id and password. See page 3 for more information regarding this id and password.

Requesting access: To request access to Control-D, please visit <forms.asu.edu> and complete the online request form.

1. Log-in using your ASURITE user ID and password
2. Select the third bullet: Administrative Access Requests (Advantage, DARSweb)
3. Select number two: Request for Advantage Financial System Access
4. Select OTHER
5. Type **control-d** for desired level of access

Support: OPS Data Center
480-965-4554
Email: tops@asu.edu

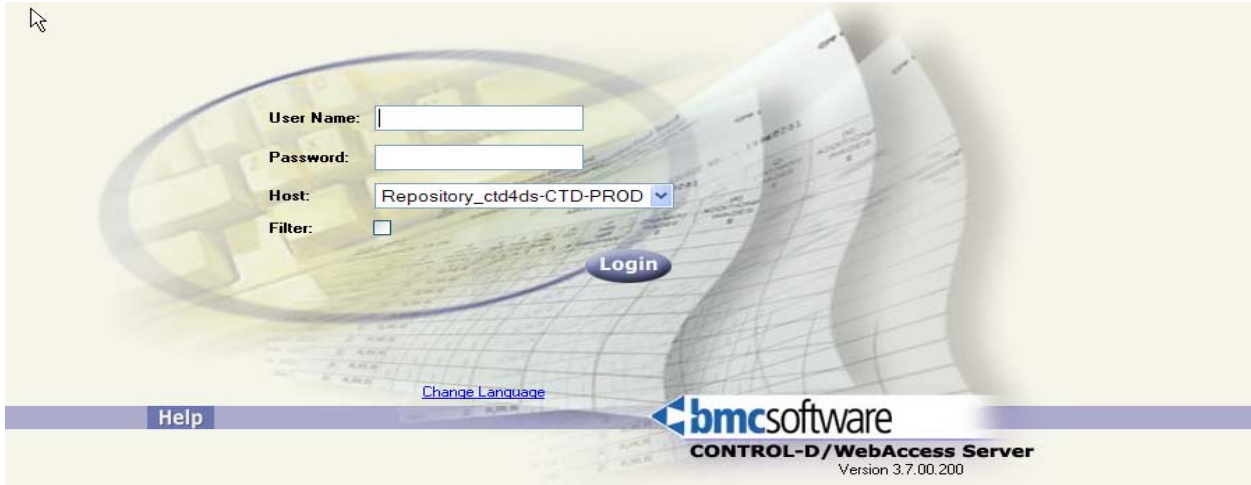
Advantage Helpline
480-965-2334
Email: Advantagehelp@asu.edu

Reference Materials: Pages 3 thru 9 of this booklet demonstrates simple searches in Control-D that will help users retrieve, view and print Advantage Month-end Packets.

In addition to the instructions contained in this booklet, the login page of the Control-D webpage has a "Need Help/Ask Production Support" link available. The Control-D Web Access Help Pages provide step-by-step instructions on items such as Control-D Requirements, Logging-in, Report filters, viewing and printing reports and much more.

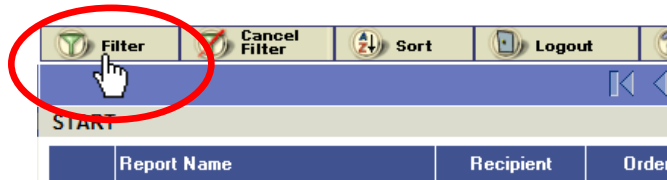
To access Control-D WebAccess visit <https://reports.asu.edu>.

The Control-D login screen will appear.



- Enter your ASURITE User ID and password.
- Click on **Login**.

The following view will appear. Select the **Filter tab** on the WebAccess toolbar to open the Filter Report List screen.



The report parameters tab of the filter window is displayed by default.

Example:

The screenshot shows a web browser window titled "CONTROL-D/WebAccess Server - Filter - Windows Internet Explorer". The address bar contains the URL: <https://ctd-prod.asu.edu/wa/bmc-ctd-wa-cgi.exe?0=FilterWindow&d=42465097180409111108Y2178626094&2=%2F0000>. The main content area is titled "Filter Report List" and includes a help icon. Below the title, there is a section for selecting filtering criteria, with a "Filter name" dropdown menu set to "No predefined filter". To the right of this section are "Delete" and "Save" buttons. Below this, there is a section for including filtered reports, with a dropdown menu set to "Current folder only" and a checked "Apply to all folders" checkbox. The main form area has four tabs: "Report Parameters" (selected), "Date&Time", "Report Type", and "Index". The "Report Parameters" tab contains several input fields: "Report Name", "Job Name", "Remark", "Category", "Index Name", "Index Value", "Containing text", "Version" (with a dropdown arrow), and "Generation". To the right of these fields is a "Report Status" section with a checked "Active" checkbox. At the bottom right of the form are "Apply" and "Default" buttons.

Specific reports can be listed utilizing the filter window. The report list produced is based on the filter criteria entered.

Report Parameters Tab

The following items can be used in defining the filtering criteria.

1. **Report Name** - matches reports with this recipient name.
2. **Job Name** - matches reports created by the specified job
3. **Remark** - matches reports having specified remarks.
4. **Category** - matches reports with this category name. Category is an informative field that specifies the decollation that produced this report.
5. **Index Name** – matches reports with index names. This index name can be entered here or from the Index Tab.
6. **Index Value** - matches reports with this index value. The index value refers directly to one of the values of the name specified in Index Name. Reports opened from the filtered list contain only the pages with matching indexes. The index value can be entered here or from the Index tab.

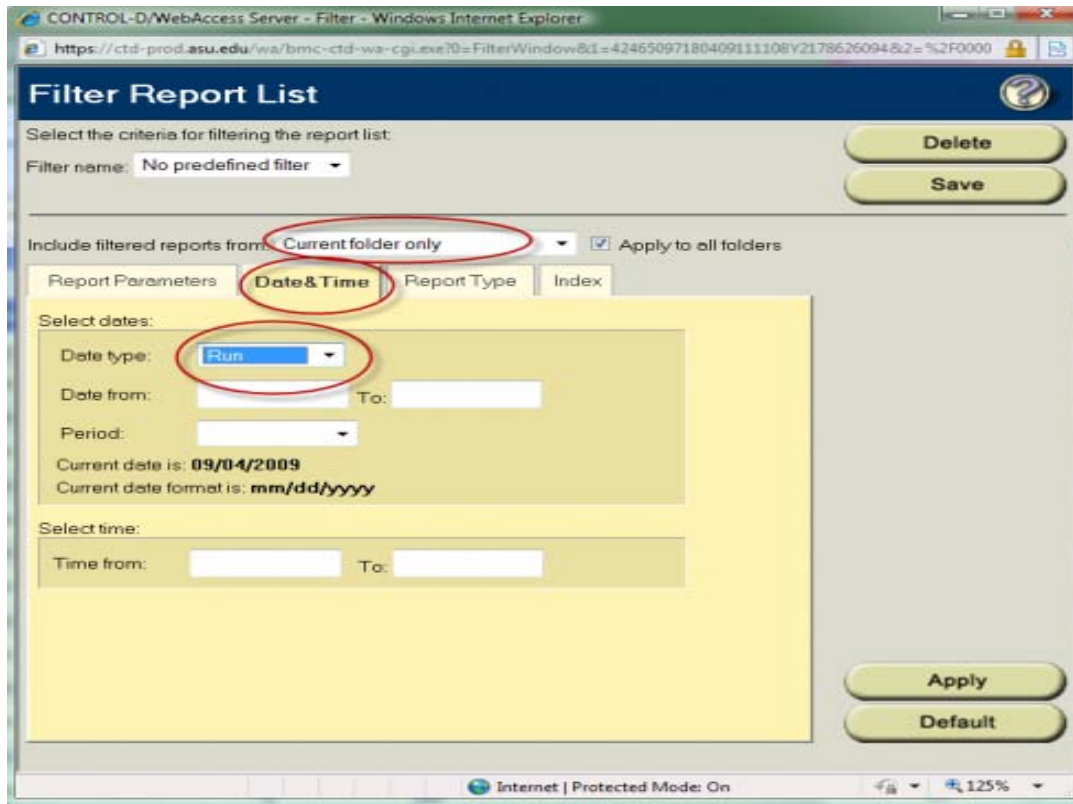
8. **Version**– Select "Last Version" to list only the most recent version of each report (Example: Only the current Month End Advantage reports).

- * Active - non migrated reports.
- * History – long term archived reports.
- * Migrated – reports that have been moved to an alternative location from the active report folder.

Note: Recipient is no longer available. In the main report list window, there is a folder for each valid recipient. You will only see folders which you are authorized to view. Open the recipient's folder to view available reports, then initiate the filter.

Date & Time Tab

The Date & Time tab is used to filter reports that match specified date and time characteristics, such as decollation date or age of report.



Date & Time Tab

Specify a date range using the MM/DD/YYYY format displayed in the Date & Time tab.

NOTE - The date range can also be represented as a calculation with respect to "today's date" using the keyword #today or #today-n. The '-n' represents the number

of preceding days from the date entered in "today's date". **Date Type** should be set to **Run**.

Period

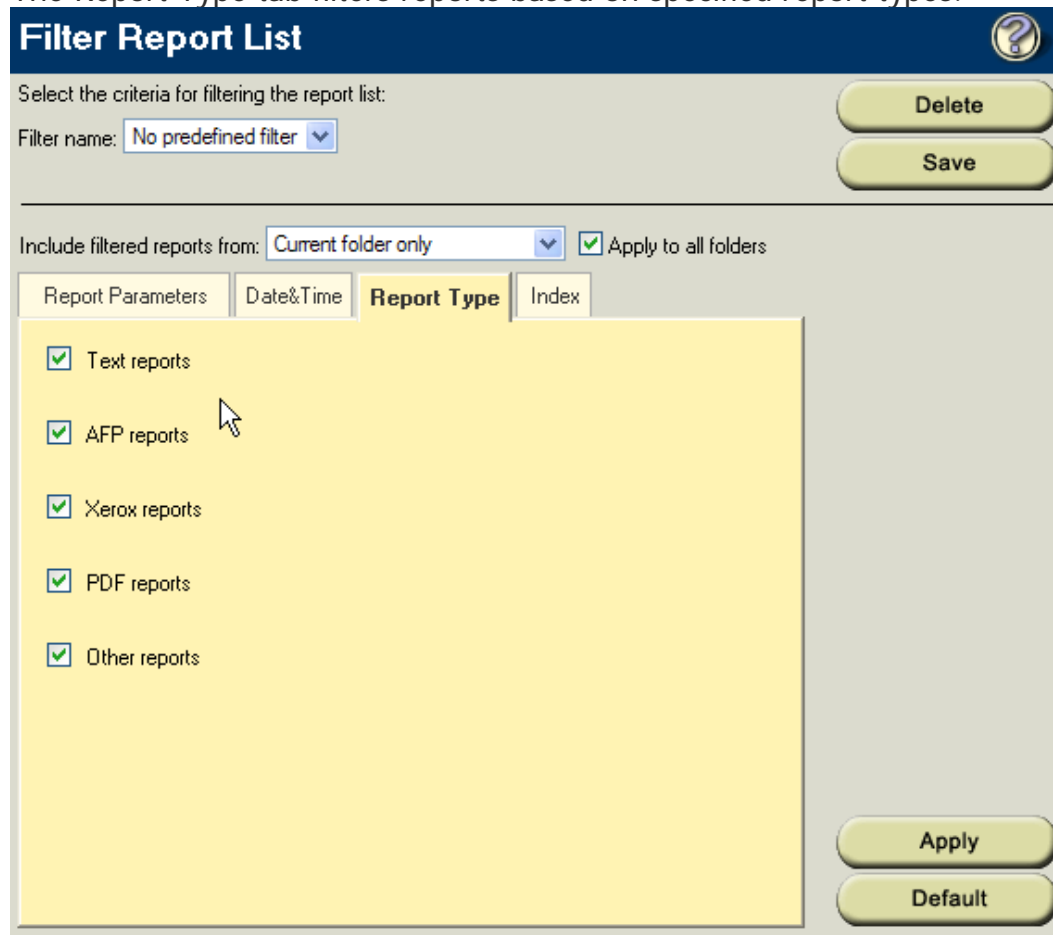
If Period is specified, the Date From and To fields are automatically filled in with the selected period.

The following definitions are available to choose from.

- **Last Day** - reports that became available today
- **Last 5 Days** - reports that became available within the last 5 days
- **Last 10 Days** - reports that became available within the last 10 days
- **Last 20 Days** - reports that became available within the last 20 days
- **Last 6 Months** – reports that became available within the last 180 days

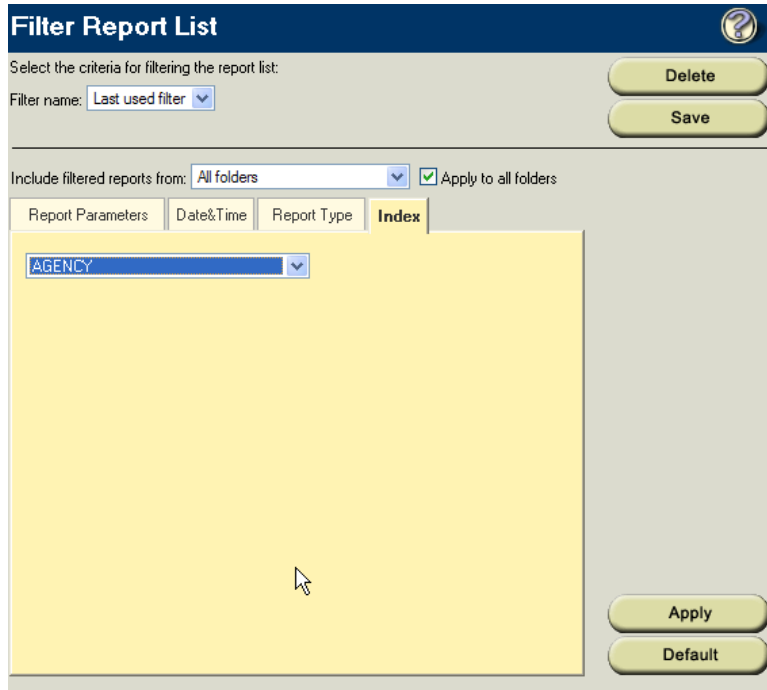
Report Type Tab

The Report Type tab filters reports based on specified report types.



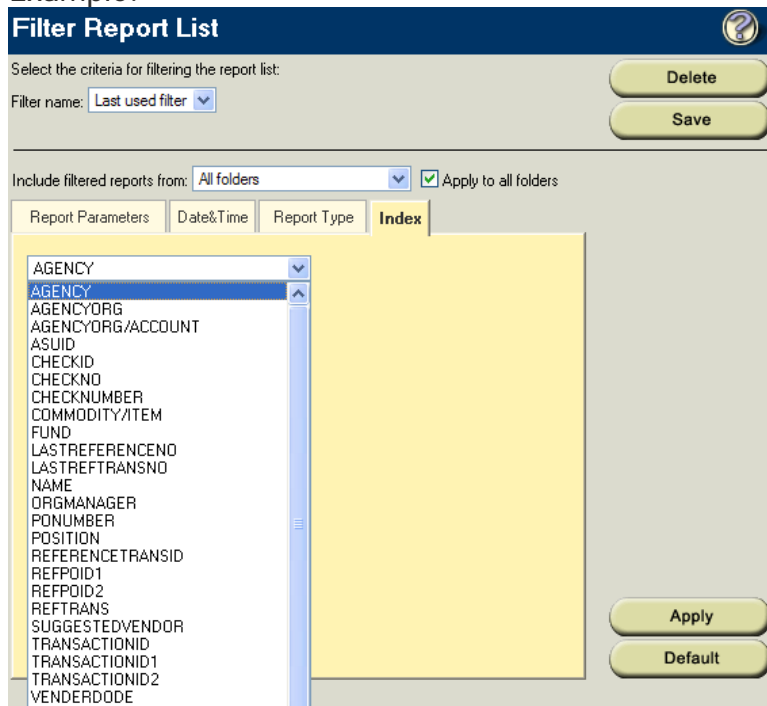
Index Tab

The Index tab filters reports held in repositories that support global indexes. Global indexes are used to search multiple reports for specific values in report text.



To display a list of available indexes use the drop-down arrow in the Available Indexes box.

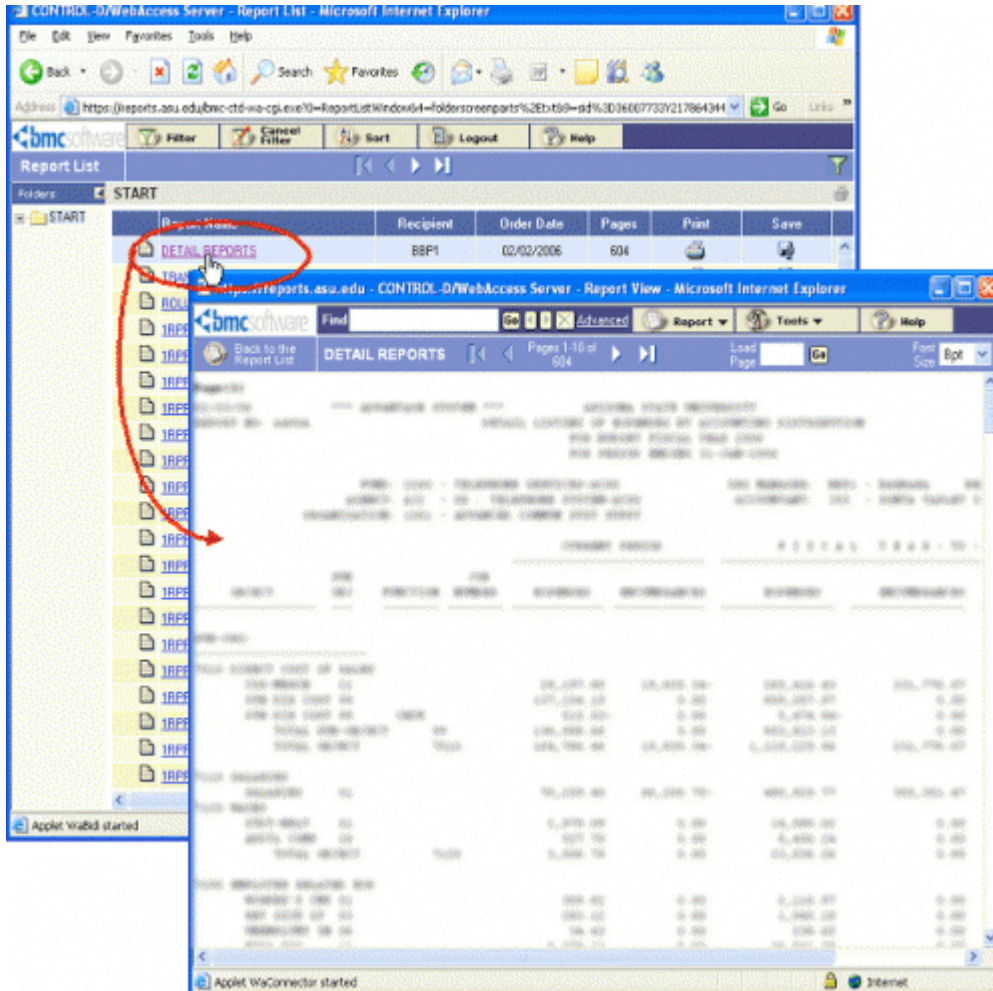
Example:



Viewing a Report with Control-D WebAccess

1. Position the cursor over the report name and click to view the report. The report will open in a separate window.

Example:



Retrieving Advantage Month-End Packets by Org Manager

The following steps demonstrate a simplified search for retrieving an Org Manager's most current Advantage month-end packets sorted by Report Name (i.e. RSSSA, RBDUG, A400A, A611E, etc.). All Advantage accounts assigned to this Org Manager will be provided within each report.

Report Parameters Tab

Reports Status: Leave Active checked.

Utilize the **Index Tab** to auto-populate the **Index Name** and **Index Value**.


Index Name: Most commonly used Index Names are:

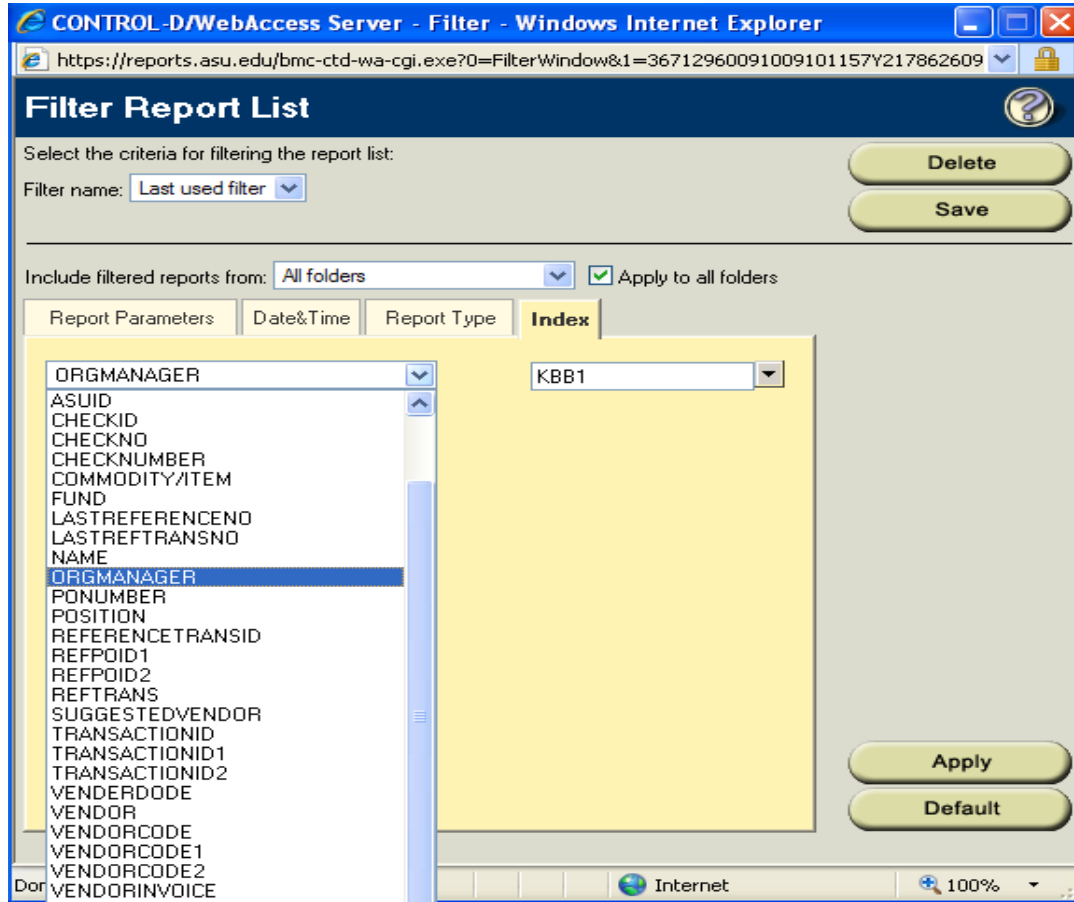
- AGENCY
- AGENCYORG
- ORGMANAGER
- ORGMANAGER\AGENCYORG

Index Value: The index value relates to the information specified in Index Name. For example, if ORGMANAGER is selected as the Index Name, the Index Value would be the Org Manager's Advantage id (i.e. KBB1).

The screenshot shows the 'Filter Report List' interface. At the top, there's a blue header with a question mark icon. Below it, a section for selecting filter criteria includes a 'Filter name' dropdown set to 'No predefined filter', and 'Delete' and 'Save' buttons. The main area has a dropdown for 'Include filtered reports from' set to 'Current folder only' and a checked 'Apply to all folders' checkbox. Below this are three tabs: 'Report Parameters', 'Date&Time', and 'Index'. The 'Index' tab is selected and circled in red. The 'Report Parameters' section contains several input fields: 'Report Name', 'Job Name', 'Remark', 'Category', 'Index Name' (with 'ORGMANAGER' entered), 'Index Value' (with 'KBB1' entered), 'Containing text', 'Version' (with a dropdown arrow), and 'Generation'. To the right of these fields is a 'Report Status' section with a checked 'Active' checkbox. At the bottom right, there are 'Apply' and 'Default' buttons.


Index Tab

- Click on the **Index** tab.
- Click on the drop-down arrow  under **Available Indexes** to display a list of available indexes.
- Click on the **ORGMANAGER** option.



- A second index box will appear.
- Enter the ORG Manager id (i.e. KBB1) in **ALL CAPS**

Date & Time Tab

- Click on the Date & Time tab.
- Click on the arrow down  on the Period option.
- Last 20 days or a date range.
- Select Apply.

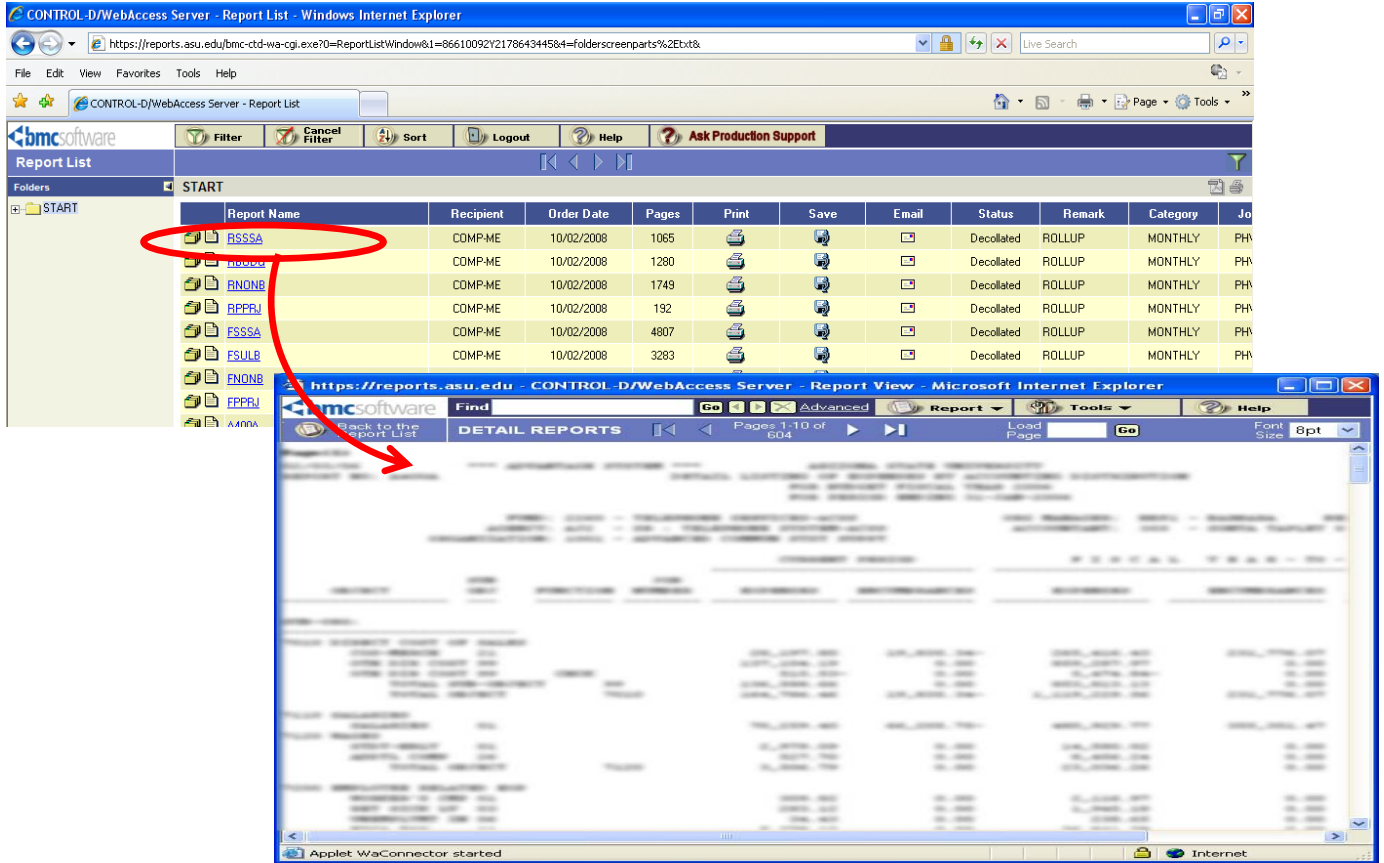
****Last Day** is defined as reports that became available today.

All the current Advantage Month-end reports for this Org Manager will be displayed.

Report Name	Recipient	Order Date	Pages	Print	Save	Email	Status	Remark	Category	Job
FSSSA	COMP-ME	10/02/2008	1065				Decollated	ROLLUP	MONTHLY	PH
FBUDG	COMP-ME	10/02/2008	1280				Decollated	ROLLUP	MONTHLY	PH
FNQNR	COMP-ME	10/02/2008	1749				Decollated	ROLLUP	MONTHLY	PH
FPPBJ	COMP-ME	10/02/2008	192				Decollated	ROLLUP	MONTHLY	PH
FSSSA	COMP-ME	10/02/2008	4807				Decollated	ROLLUP	MONTHLY	PH
FSULB	COMP-ME	10/02/2008	3283				Decollated	ROLLUP	MONTHLY	PH
FNQNR	COMP-ME	10/02/2008	8018				Decollated	ROLLUP	MONTHLY	PH
FPPBJ	COMP-ME	10/02/2008	2990				Decollated	ROLLUP	MONTHLY	PH
AMDA	COMP-ME	10/02/2008	21455				Decollated	DETAIL	MONTHLY	PH

Viewing a Month-end Report

To view an individual Advantage month-end report, position cursor over the report name and click to open the report. The report will open in a separate window.



Printing a Single Report

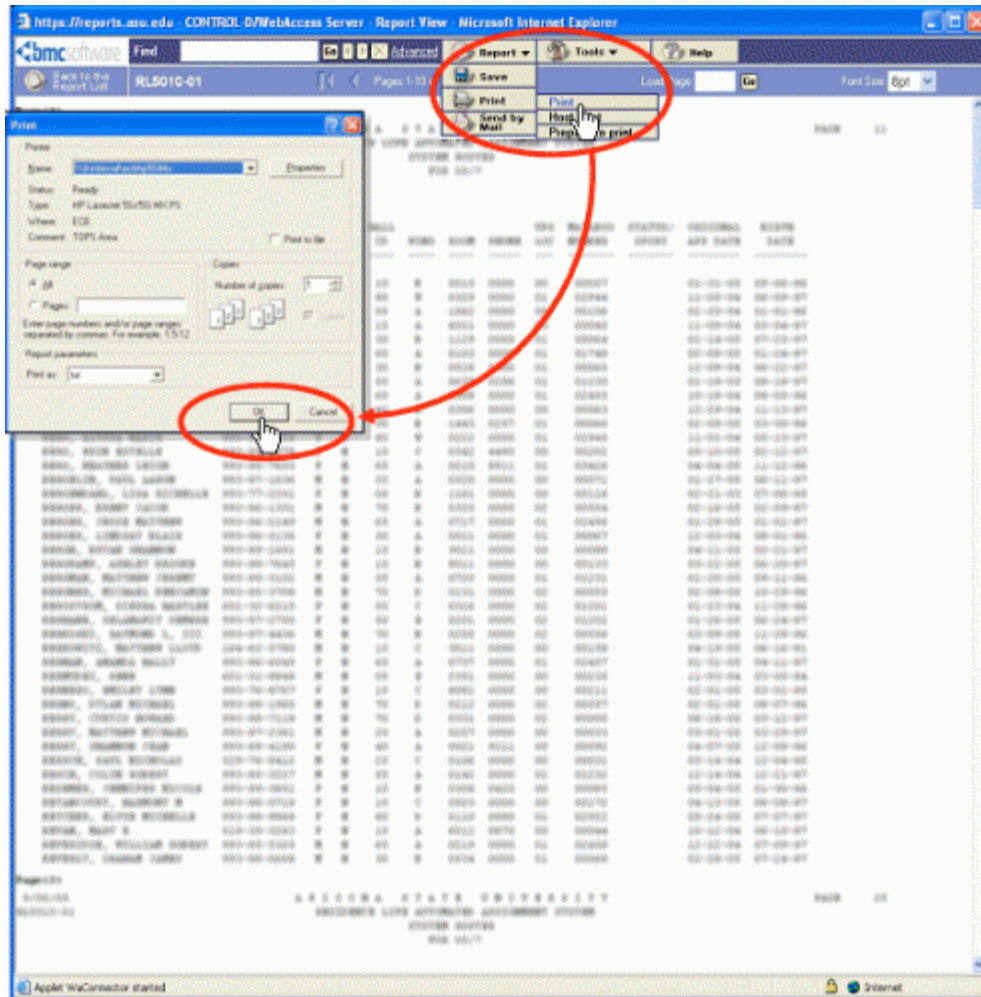
Open the report to be printed.

On the Control-D WebAccess Toolbar:

- Select the dropdown arrow next to the REPORT
- Select PRINT
- Click on PRINT submenu

Print all or part of report as needed.

Example:



Printing Multiple Reports

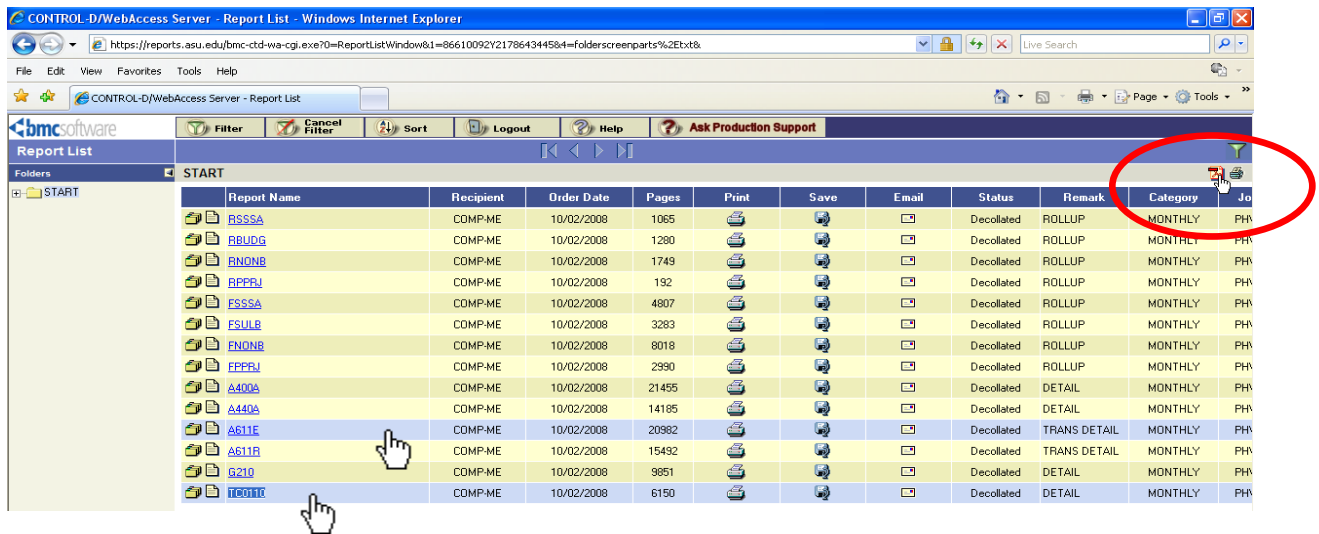
Control-D has an option that allows a user to select multiple reports to be turned into a “unified PDF report” that can be modified and/or printed.

To create a “unified PDF file:”

1. Highlight the reports you wish to print by clicking next to the report name. To select multiple reports for print, hold down the “ctrl” key while selecting reports.

Note: Do not click on the report link as it will open the report in the detail view. Below the A611E and the TC0110 reports have been selected.

2. Click on the PDF icon. This will create a PDF that can be modified and/or printed.



Additional Information

Restoring a Report from History

Restoring reports from history is no longer necessary. If, for any reason, you don't see a report, please call Production Support and x5-4554 for assistance.

Saving Searches

To save a search:

- o In the Filter window, click Save once all the search criteria has been entered.
- o The Save Predefined Filter window is displayed.

- o Type a search/filter name.
- o To set this search as the default, select Default.
- o Click Save.
- o The saved search is selected in the Filter Name box.

To delete a search:

- In the Filter window, select a filter name.
- Click Delete.
- A confirmation message is displayed.
- Click Yes.

Additional Information

Report Parameters

Report Name: Leave blank to return all reports for an Org Manager or provide a report name to search for a particular report (i.e. A611E).

A search may be done for more than one report by filtering with a wildcard character.

Filtering With Wildcard Characters

The asterisk (*) wildcard character can be used in the Report Parameters tab to implement searches using pattern matching. The asterisk wildcard can represent a single character or a group of characters that match filter criteria. Wildcards can be used anywhere within filter criteria fields, anywhere in the field (i.e. *611*).

Installing a Plug-in for Control-D WebAccess Printing

It is necessary to install a plug-in to print from WebAccess Control-D. Administrator rights are required to perform the following set of instructions.

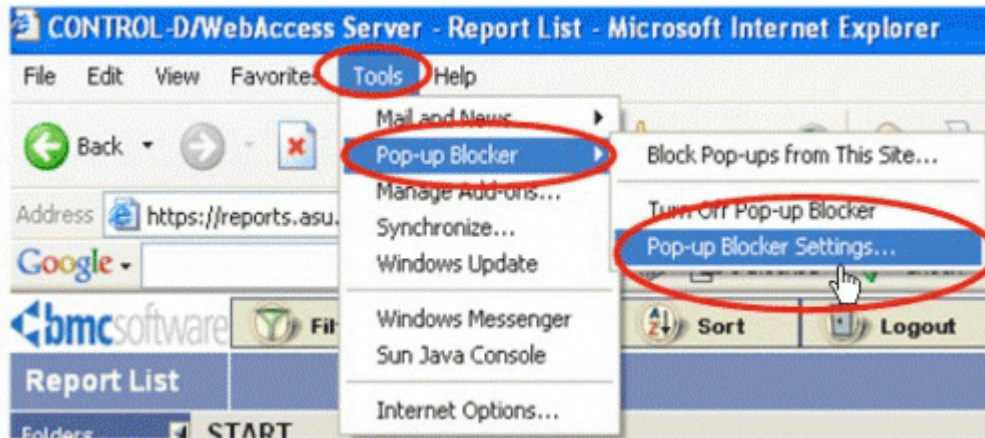
1. Ensure the internet browser is accepting "pop ups" for WebAccess Control-D.

* From the tools option on your internet browser:

> Choose Pop-up Blocker

> Pop-up Blocker Settings

Example:

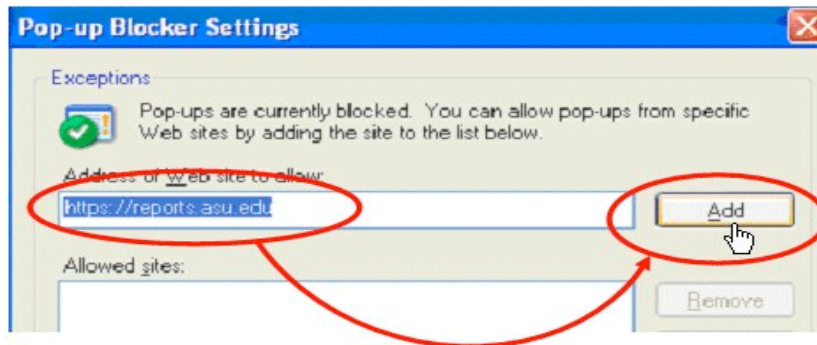


2. Where prompted to place the address of the website to allow:

* Enter <https://reports.asu.edu>

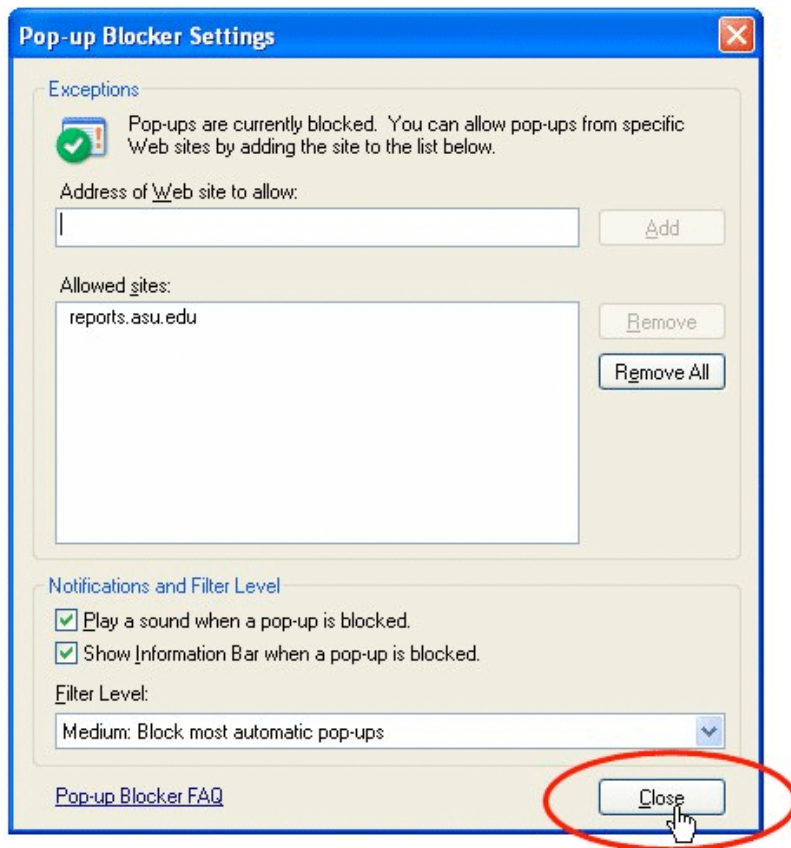
>Click on the Add button.

Example:



3. When the address has been added it will show up in the *Allowed sites* sections.

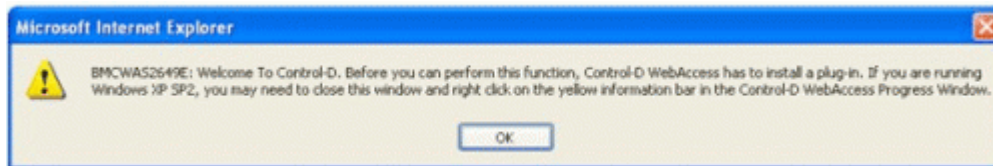
Example:



4. Choose a report to print. The message below will appear.

>Click 'OK'

Example:

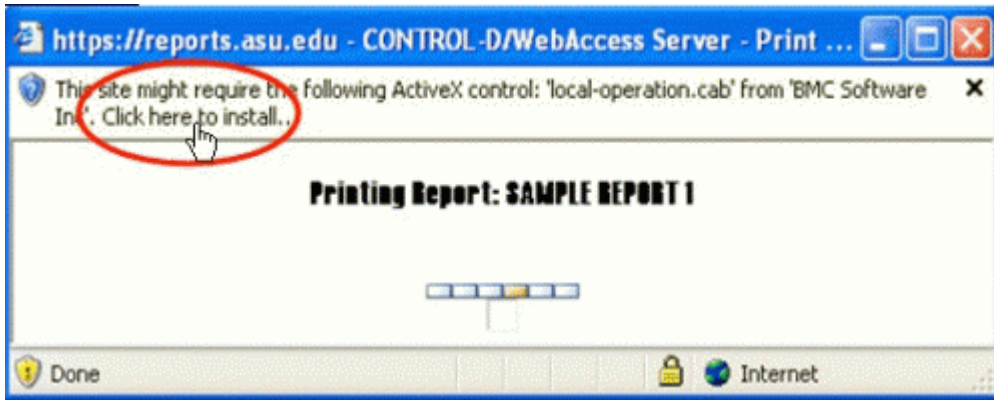


5. On the bottom right portion of the window another "pop-up" will be displayed.

* Find the instructions "*Click here to Install..*"

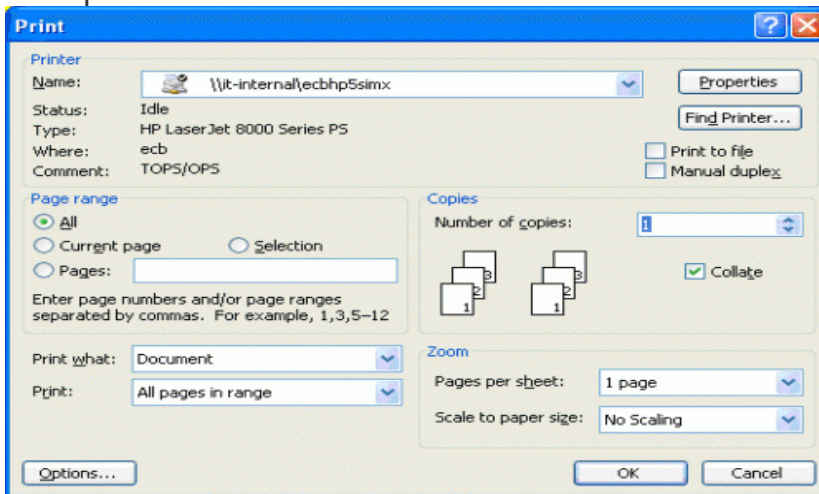
> Place the cursor on the verbage and click

Example:



**The printer box will be displayed when the installation is completed.

Example:



For more information on Reports Status, the Report Parameters, Date & Time, and Index tabs please visit the Control-D help pages.