DYS – Access, View and Run Reports Job Aid

User
- All DYS Users

Process

These Job Aid tables describe the actions needed to access, view, and run DYS Reports.

Introduction
- Reports are available to run in three different ways depending on the report:
  - o   On-line = report is real-time.
  - o   Batch = report must run in a batch process before it is generated.
  - o   Both = report can either be run in batch or in real-time.
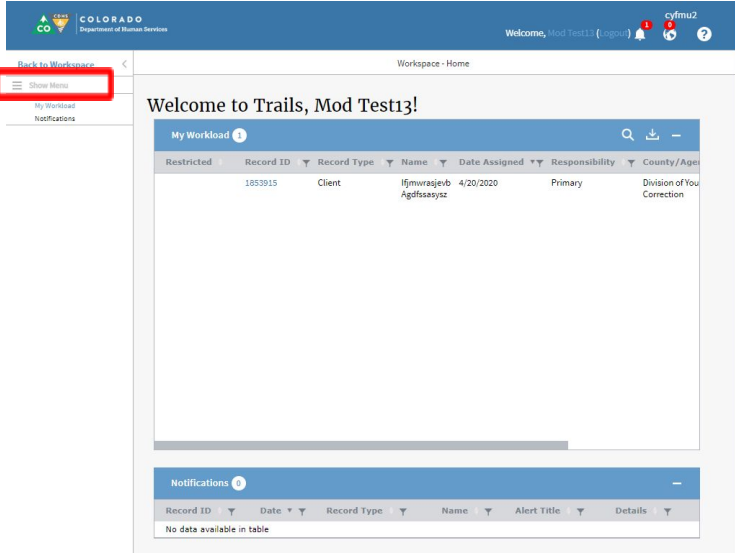
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Access and View the DYS Reports

- Reports will show and be executed based on the user's profile.

Steps/Output	Screenshot
From the *Modernized Trails* home page: 1. Click **Show Menu**. The *Left Navigation* expands to show those items the user has access to view.	

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From the *Left Hand Navigation*: 2. Click **Reports**. The *DYS Reports Workspace* displays.	
In the *DYS Reports Workspace*: **Note**: Any set of reports can be expanded to see all reports for that section. *Client Management* reports are shown as an example. 3. Click the **+** icon to the right of the **DYS Client Management** Header. **Note**: The number of reports in DYS Client Management displays in the badge.	
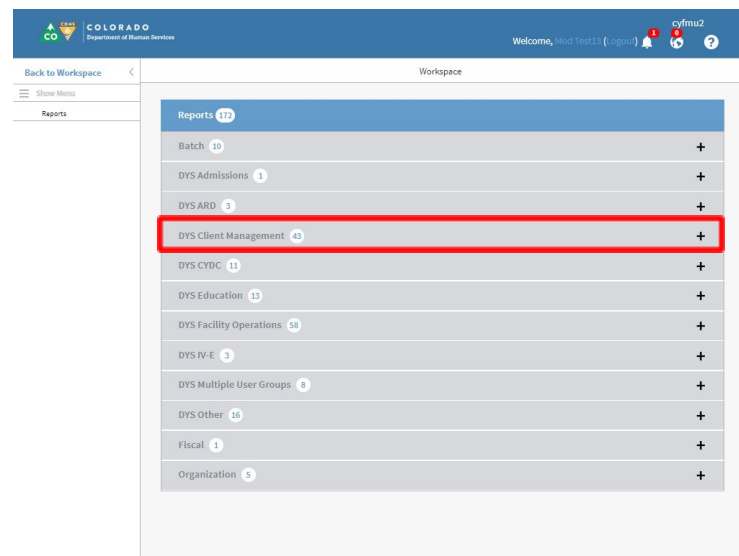
4. Use the icons to the right of each column heading to sort or filter the table.

Note: Navigate through the *DYS Client Management* reports by using the scroll bar at the right of the page.

After expanding the section (or all sections) hit Ctrl+F and type the report name or number, it will appear highlighted in the list.

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Run the DYS Reports

- Reports will have varying parameters required/optional for running the reports.
- Reports can be viewed as an Excel file, or as a PDF.

Steps/Output	Screenshot
From the Modernized Trails Home page: 1. Click **Show Menu**. The *Left Navigation* expands to show those items the user has access to view.	

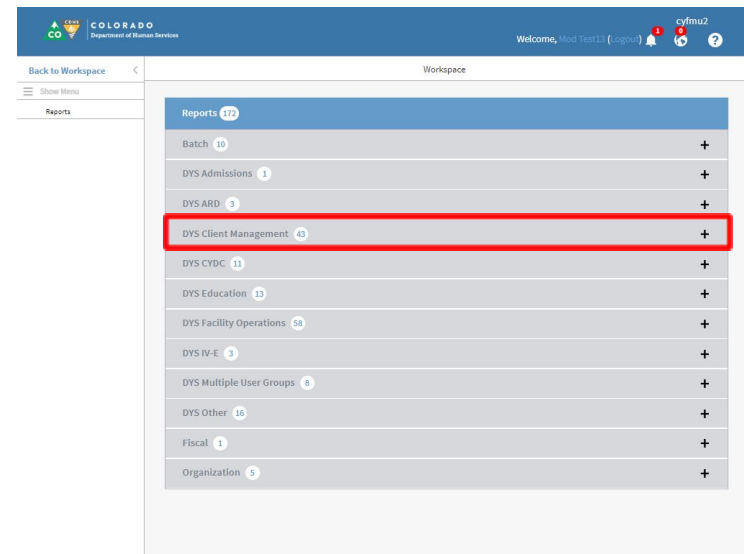|	
From the *Left Hand Navigation*: 2. Click **Reports**. The *DYS Reports Workspace* displays.	
From the *DYS Reports Workspace*: **Note**: Any set of reports can be expanded to see all reports for that section. *Client Management* reports are shown as an example. 3. Click the **+** icon to the right of the **DYS Client Management** Header.	

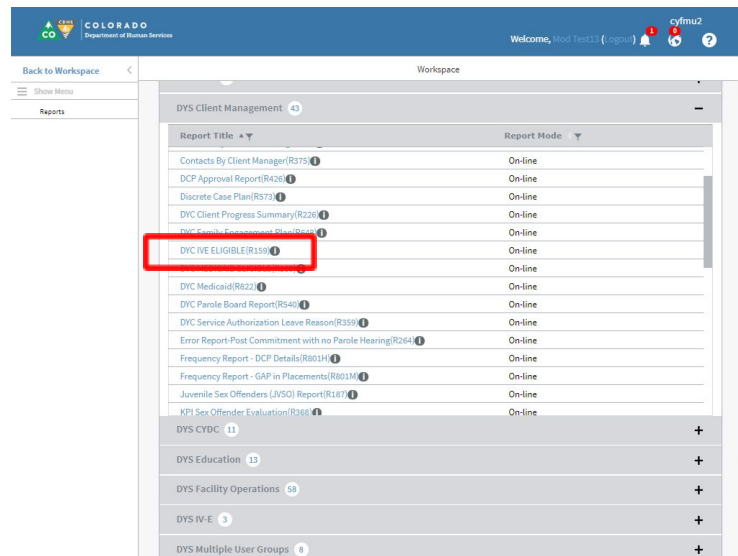4. Use the icons to the right of each column heading to sort or filter the table.
5. Find the report by using the scroll bar at the right of the page.
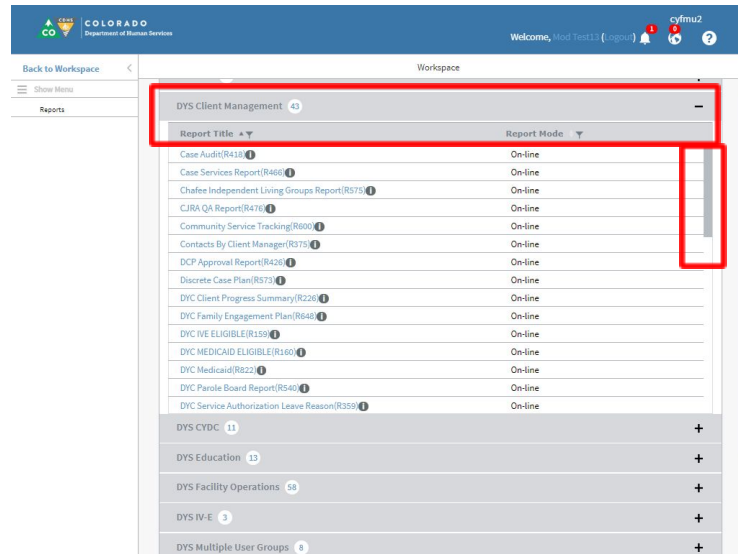
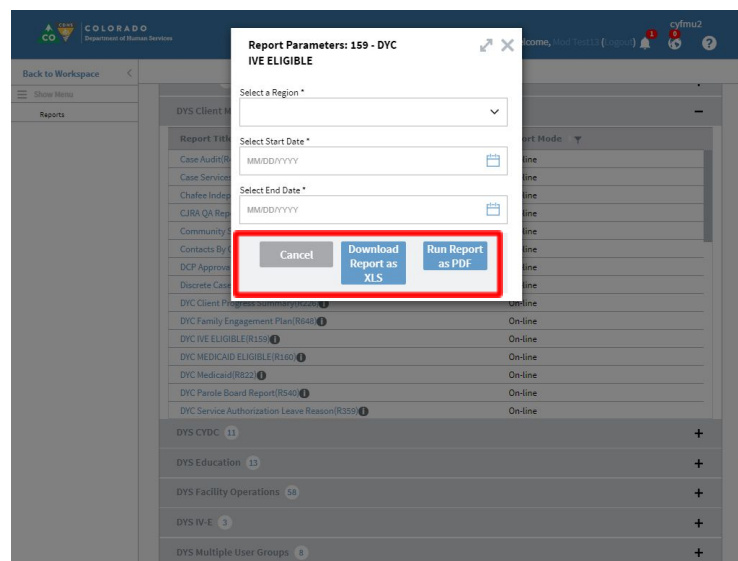

6. Click the **Report Title** link of the report needed.

The *Parameter list* pop-up displays.

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7. Enter all required fields.
8. Choose **Download Report as XLS** to receive the report in an Excel spreadsheet.
        `<OR>`
9. Choose **Run Report as PDF** to display the report as a PDF in a separate tab.
        `<OR>`
10. Choose **Cancel** to cancel the report request.	

If the report is a batch process: 11. Click **Run Batch Process** if the report requires that it must be run in a batch process, or **Cancel** to cancel the report request.	
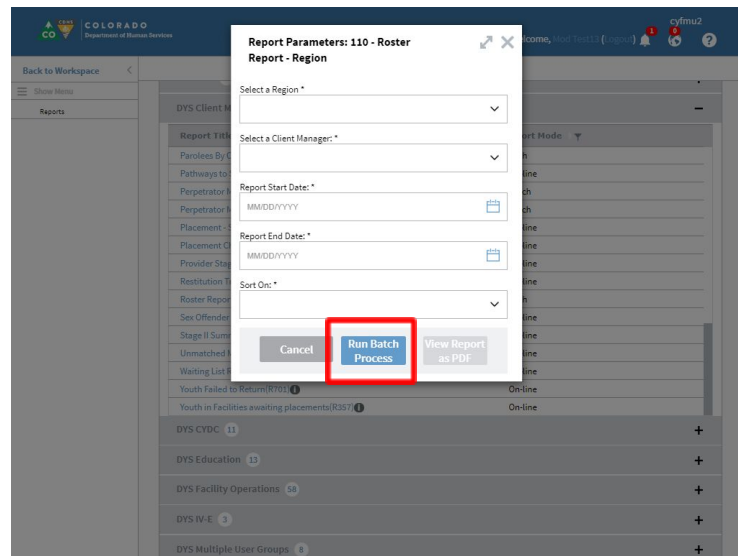
Once the Batch Process runs:

12. Click **View Report as PDF**, or **Cancel** to cancel the report request.
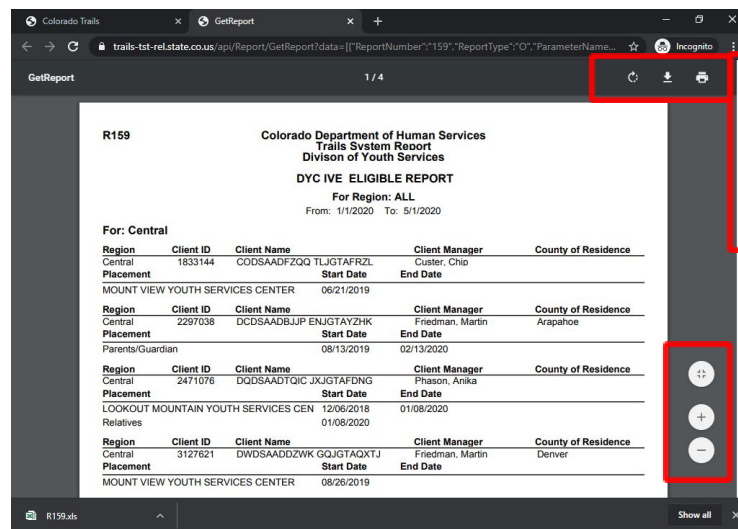
Report displays in a separate tab.
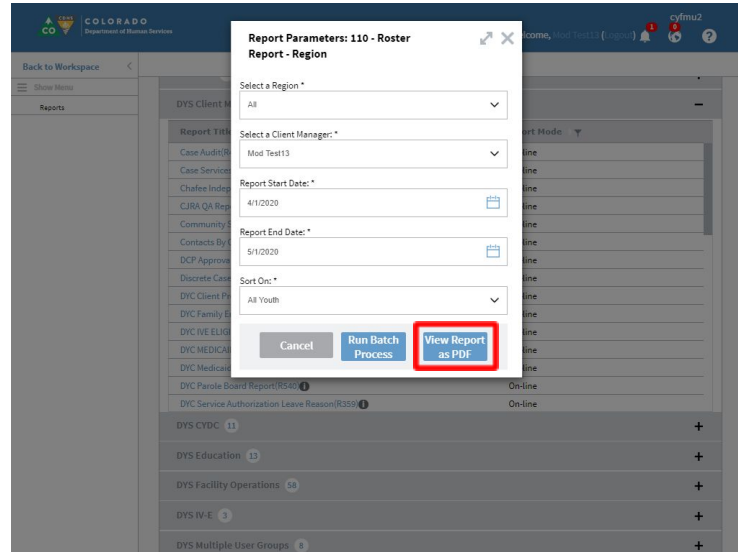
Report displays in the *GetReport* tab.

13. Use the scroll bar to scroll through the report.

Note: Report can be made smaller or larger, saved and/or printed using the icons displayed.

If the report is created as an XLS file:

14. Click the link at the bottom of the page to open the Excel file into the Microsoft Excel tool.