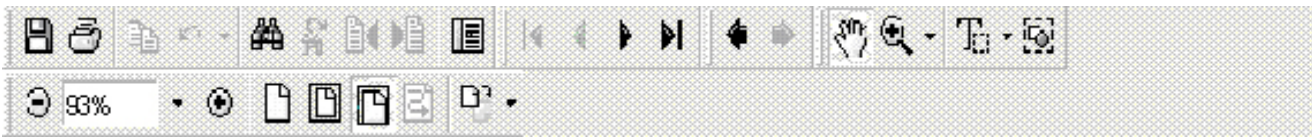# Reports Training Guide

This guide has only ten pages no table of contents has been created.

Reports

This section provides information on how to use the eight optional reports.
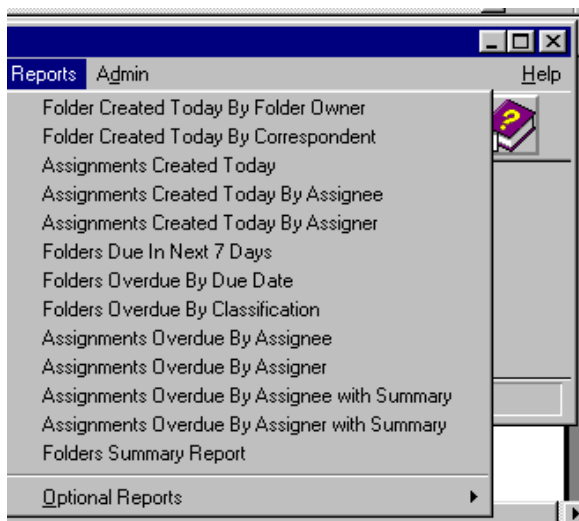
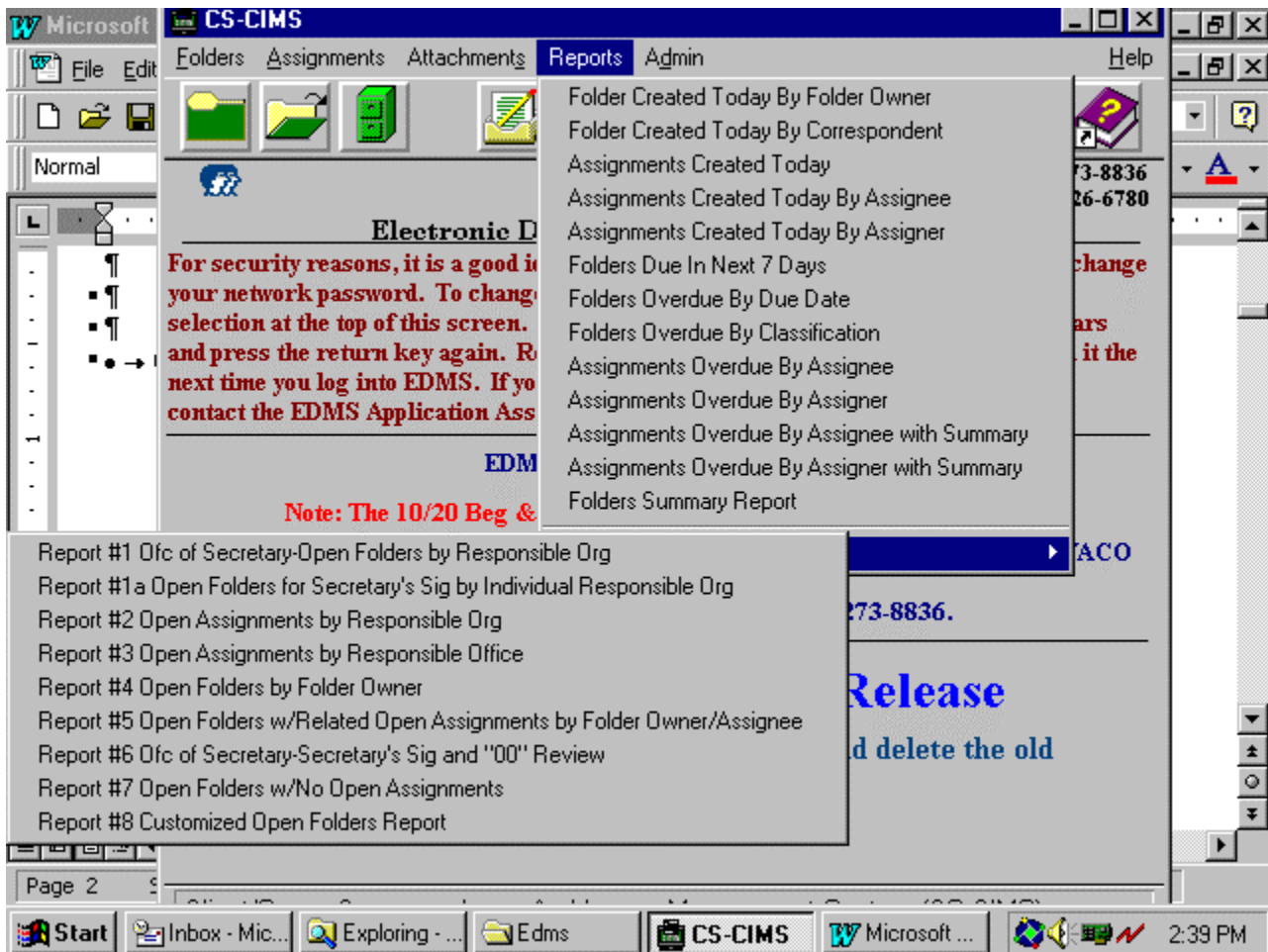### How to Run EDMS 2551 Optional Reports

The REPORTS command

From the CS-CIMS Main Menu screen,
Select the <u>Reports</u> Command option.

Select the <u>Optional Reports</u> Command Option from the drop down list.

CS-CIMS

Folders | Assignments | Attachments | Reports | Admin | Help

Folder Created Today By Folder Owner
Folder Created Today By Correspondent
Assignments Created Today
Assignments Created Today By Assignee
Assignments Created Today By Assigner
Folders Due In Next 7 Days
Folders Overdue By Due Date
Folders Overdue By Classification
Assignments Overdue By Assignee
Assignments Overdue By Assigner
Assignments Overdue By Assignee with Summary
Assignments Overdue By Assigner with Summary
Folders Summary Report

Report #1 Ofc of Secretary-Open Folders by Responsible Org
Report #1a Open Folders for Secretary's Sig by Individual Responsible Org
Report #2 Open Assignments by Responsible Org
Report #3 Open Assignments by Responsible Office
Report #4 Open Folders by Folder Owner
Report #5 Open Folders w/Related Open Assignments by Folder Owner/Assignee
Report #6 Ofc of Secretary-Secretary's Sig and "00" Review
Report #7 Open Folders w/No Open Assignments
Report #8 Customized Open Folders Report

Microsoft

File Edit

Normal

Electronic D

For security reasons, it is a good i...
your network password. To chang...
selection at the top of this screen.
and press the return key again. R...
next time you log into EDMS. If yo...
contact the EDMS Application Ass...

EDM

Note: The 10/20 Beg &

...ACO

73-8836
26-6780

273-8836.

Release

d delete the old

Page 2

Start | Inbox - Mic... | Exploring - ... | Edms | CS-CIMS | Microsoft ... | 2:39 PM

Select the desired report.

Report #	Report Name	Descriptions
1	Off of Secretary-Open Folders by Responsible Org	This report lists open folders for Secretary's signature (00, 001) grouped by responsible organization (Doc. Type which is located on the Folder screen behind the Type/Fac button). All related open assignments and all interim response assignments open or closed, are listed to the right. Sort order is by responsible organization, then by folder due date and folder number in ascending order. Report provides a total of open folders for each responsible organization and a grand total for the report. ***This report is primarily for use by the Office of the Secretary.*** *Excludes internals.*
1a	Open Folders for Secretary's Sig by Individual Responsible Org	This report lists open folders for Secretary's signature (00, 001) for specific responsible organization (Doc. Type which is located on the Folder screen behind the Type/Fac button). All related assignments are listed to the right. Sort order is by folder due date and folder number in ascending order. Report provides a total of open folders for the report. *Excludes internals.*
2	Open Assignments by Responsible Org, *sorted by assignee*	This report lists open assignments for a specific organization. This report is grouped by action office (department level) of the assignee and is broken out by individual assignee within each action office. The sort order is by folder due date, then by folder number in ascending order. This report allows the user to specify a date range, a specific organization and a specific signature code or all signature codes. The report also provides a total of open assignments for each assignee and a grand total for the report. This report is for use at the organization level (i.e., 10, 20, 40, 004, 005, 006, etc.) ***The parameter field, "Org Code," represents the STAFF.SORG field (organization field of the Staff Maintenance record) of the action office or individual to whom the assignment was made.*** *Excludes action code "FYI."*

3	Open Assignments by Action Office Assignee	This report lists open assignments for a specific action office and may also include its subordinate offices. This report is grouped by action office (department level) of the assignee and is broken out by individual assignee within each action office. The sort order is by the assignment due date, then by folder number in ascending order. The report also provides a total of open assignments for each assignee and a grand total for the report. This report is for use at the department (individual office) level as opposed to the organization level. (i.e., 11, 11*, 21, 21*, 402, 402*, 045, 045* 03, 03*, etc.) ***The parameter field, "Office Code," represents the STAFF.SDEPT field (department field of the staff maintenance record) of the action office or individual to whom the assignment was made. *Excludes action code "FYI."***
4	Open Folders by Folder Owner	This report lists open folders grouped by folder owner. The sort order is by folder due date then by folder number, in ascending order. The report provides a total for each folder owner group and a grand total of open folders for the organization. ***The parameter field, "Fldr Ownr Org," is the STAFF.SORG field (organization field of the staff maintenance record) of the folder owner. The parameter field, "Fldr Ownr Office," is the STAFF.SDEPT field (department field of the staff maintenance record) of the folder owner.***

5	Open Folders with Related Open Assignments by Folder Owner/Assignee	This report combines previous versions of Reports #5 and #6. It lists open folders and related open assignments. The report is grouped by folder owner or assignee, whichever the user prefers. This is done through a "Group By" parameter which allows the user to toggle the group function. The sort order is by folder number, folder due date and assignment due date in ascending order. Report provides total open assignments for each folder owner/assignee and a grand total of open folders and open assignments. *The parameter field, "Fldr Ownr Org," represents the STAFF.SORG field (organization field of the Staff Maintenance record) of the folder owner. The parameter field, "Fldr Ownr Ofc." represents the STAFF.SDEPT field (department field of the Staff Maintenance record) of the folder owner. The parameter field, "Assignee Org," represents the STAFF.SORG field (organization field of the Staff Maintenance record) of the action office or individual to whom the assignment was made. *Excludes action codes "IG" and "FYI."*
6	Open Folders for Secretary's Signature (00, 001, 00 Review) by Responsible Organization	This report lists open folders for Secretary's signature (00, 001, 00 Review) grouped by responsible organization (Doc. Type which is located on the Folder screen behind the Type/Fac button). All related open assignments and Interim Response assignments open or closed, are listed to the right. Sort order is by responsible organization, then by folder due date and folder number in ascending order. Report provides a total of open folders for each responsible organization and a grand total for the report. *This report is primarily for use by the Office of the Secretary. *Excludes internals*
7	Open Folders with No Open Assignments	List open folders for specified owner organization, sorted by folder owner, folder number in ascending order. The report lists folders that have no open assignments.
8	Customized Open Folders Report	Lists open folders for specified responsible organization. All related assignments are listed to the right. Sort order is by folder due date and folder number in ascending order. Report provides a total of open folders for the report. User defined parameters enable you to customize this report. Parameters include: Responsible Organization, Document Type, and Signature Code. *Includes internals.*

Based on your report choice, a specific parameter screen will be displayed. Enter the appropriate criteria.

Each parameter tab must contain an entry. Read prompt text and note the format examples for each parameter.

Entries that are incorrectly formatted will produce inaccurate report data or no data results at all.


Hint: Avoid clicking the **OK** button before entering all parameters. If parameters are entered incorrectly, the report will still run. However, the report results will be incorrect or show no data.

```
Enter Parameter Values                                    [X]

| Assign Begin Date | Assign End Date | Sig Code | Office Code |

    Enter Begin Date for the date range.




    Value        [1999/01/01                        ▼]




                        [  OK  ]  [ Cancel ]  [ Help ]
```

Press **OK** button. Please be patient. The system may take several seconds to generate the report.

The **CS-CIMS: View Report** screen will display.

Note*: The report screen is split into two parts. The right pane displays the report. The left pane displays a high level outline of the report, showing the hierarchy of groups and subgroups in a tree format. The Group Tree feature allows you to jump back and forth between different groups. To turn the Group Tree feature off, press the Group Tree icon.
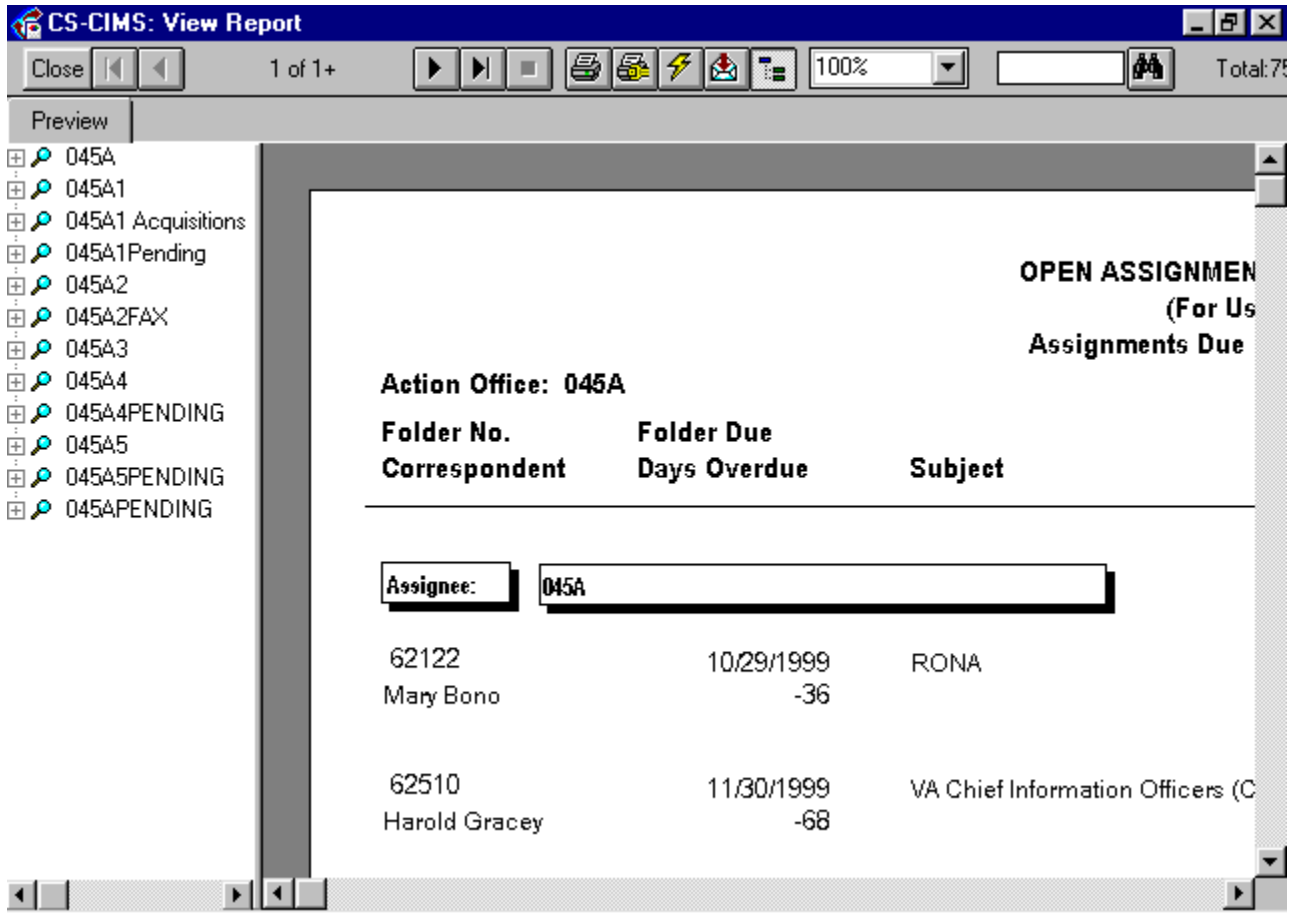
If you would like to select new report parameters or refresh report data, Click the **Refresh button**

Note: You can print your report from the **CS-CIMS: View Report** screen by pressing the **PRINT** button

Report Screen Icon Descriptions

Use the **PRINT** command icon to select a printing option.

Use the **PRINT SETUP** to set print options.
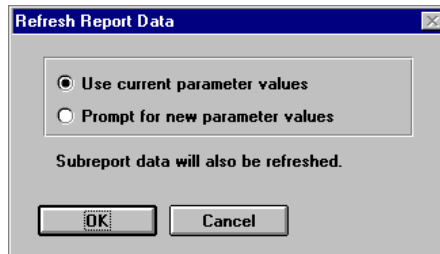
Use the **REFRESH BUTTON** to Refresh Report Data and select new report parameters. See **Refresh Report Data** dialog box **above** for available options.

Use BINOCULAR BUTTON to search specific information within the Report appearing on the screen. (For Example - A person's name or a folder number).
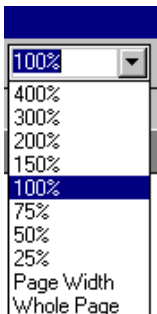
Use the **ZOOM** drop down menu to set magnification factor.

Use STOP BUTTON **to stop the report from running. Wait a few minutes for the** CLOSE BUTTON **to appear with** Black **letters.**

Then click on the Close **button. This will return you to the main menu allowing you to run the report again if necessary.**

Use **GROUP TREE** view icon to toggle on/off the navigation feature.

Not applicable in EDMS. DO NOT USE THIS BUTTON.

How to PRINT a report to your printer.

From the CS-CIMS View Report screen, press the PRINT command button.
The following print screen will display.

Select **Pages** option and then enter a specific page number to print a specific page.
(Ex. **From**: 2 **To**: 4 or **From**: 4 **To**: 4 to print only one page).

How to Modify PRINTER setup.

Use the Print Setup icon to change the your printer location or page size.
From the CS-CIMS: View Report screen, click   the PRINT Setup icon.
The following screen will display.