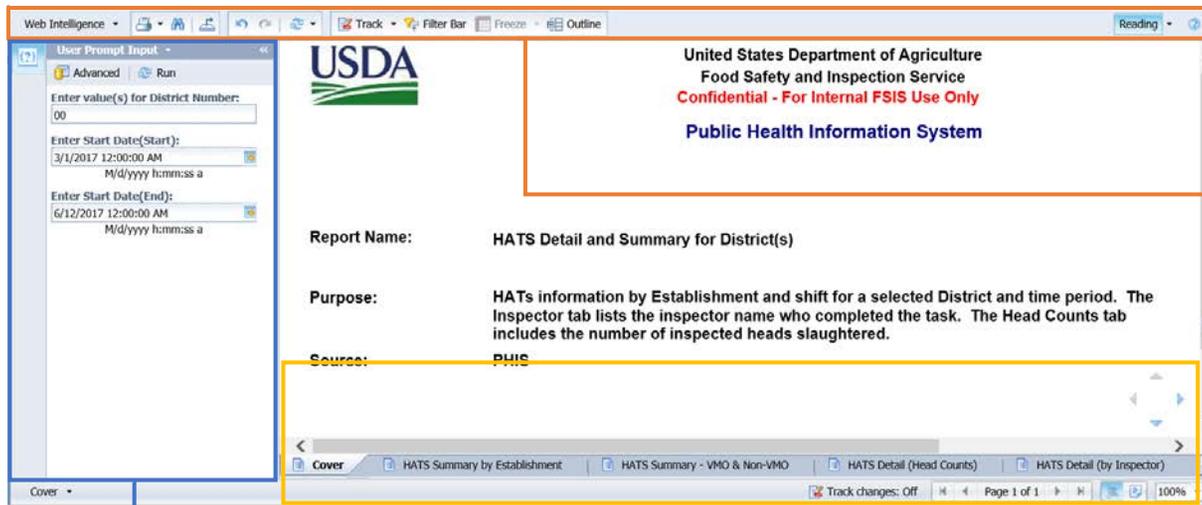


PHIS Quick Reference Guide: Reports

This quick reference guide explains how to run PHIS reports in the updated user interface and access expanded options available. The guide is for all FSIS user roles with View Reports access.



User Prompts—Use these fields to enter prompt values quickly. You can also click Advanced to open the Prompts window.

For multi-page reports, you can use the page navigation to move back and forth between pages and tabs. Options for increasing the page size are also located in this area.

Button	Description
	Provides options to enable and disable the filter toolbar and side menus. The Report Tabs will hide tabs that are not active. The Status Bar removes the bottom bar of the report window.
	Print to a printer or use the option to save the results directly to PDF.
	The Export option has moved to the toolbar and is available to export the report in PDF or Excel formats. There are additional options for CSV Archive and Text formats. Additional controls are displayed to define exported items
	The Refresh option is now centrally located on the report with options to select and refresh one or all data points.
	Provides the option to compare the data to an earlier refresh of the data.
	Click the Filter Bar to show or hide the Report filter tool bar
	Filters the results by the selected value(s)
	Displays the different elements of the reports and allows those elements to be collapsed from view
	The Reading drop down option allows the user to view the report in HTML or PDF then displays the user input prompts

Running Reports

Selecting a Report in PHIS

1. From the left menu select View Reports.
2. Select a report and click the Run link.
3. The Reports window opens.
4. When additional parameters are required, the Prompts window appears.

Entering Report Parameters

Some reports require entering additional parameters opening a Prompt window. To enter prompt values:

1. Select the prompt from the Prompt Summary list.
2. Enter values in the Type Values Here field or use the shuttle control to add or remove available values from the list.
3. Repeat the steps for each prompt.
4. After setting your prompt values, click OK to run the report.

Changing Parameters

1. On the left side of the report, select the  button for the User Prompt Input. This displays the default prompts. You can also select the Advanced button to open the Prompts window.
2. Update the prompts and click Run.

Selecting a Reading Option

There are two reading options available, HTML and PDF.

- PDF generates the report in a PDF format but has limited options for altering the report results.
- HTML has a number of options to alter the look and results of the report. Details of these options are in the section for managing report results.

Managing the Report Results

Viewing the Report

The bottom of the report page displays different tabs depending on the report. Select the tabs to see different report pages.

Filtering the Results

Pages with defined filters will display the filter toolbar. Enable the toolbar with the Filter Bar button. Select a value from the filter dropdown and the results update automatically.

Collapsing the Outline

Reports may contain multiple tables but not all the information is necessary for printing or saving. The outline feature allows grouping a page by the individual table components. Selecting a group of data allows hiding it from the results.

Freeze Table Information

Clicking on a table makes the Freeze option available. Selecting the dropdown displays options for freezing the header rows or a number of the left columns.

Printing Report Results

Click Print to create a PDF of any information included on the report page. Selecting the dropdown opens the print control window for setting a number of print options including the page to include and the orientation.

Exporting Report Results

Clicking the export button opens an export control window that provides a number of options for formatting the data output. The primary Export options are Excel and PDF.

- The Excel option defines if the format is for reading or data manipulation.
- For PDF output there is an option to select pages to include.
- There is also an option to remove report tabs from the export.

*For issues or questions, please contact the FSIS
Service Desk at 1-800-473-9135.*