How to Generate Reports for IDIS Online

1. Click on the Reports Tab located at top right corner of the IDIS Online screen.

2. On the Report Selection Page, click on the View Reports link located on the Reports menu along the left side of the IDIS Online screen. The system will open a new browser window or tab containing the MicroStrategy reports module.

3. Click on the IDIS folder. Click on the Shared Reports folder.

4. Click on the folder next to the report that you would like to generate. The folder will open and display one or more versions or sections of the selected report.

5. Click on the section or version of the report that you would like to generate. Alternatively, you can click on the Export or PDF link to export the report directly to a Microsoft Excel format or Adobe Acrobat format.

6. The system will display the parameters page (the appearance may differ based on the browser you are using). This page allows you to limit the data to be included on the report. For all reports, you must navigate through the Grantee Hierarchy to select your grantee. To do this, click on the plus signs on each level until the system displays the name of your grantee. To select your grantee, double-click the grantee name or click once to highlight the name and then click the right arrow. Once the grantee is listed in the box on the right side of the screen, you are ready to move to the next parameter.

7. The system will display other parameters based on the report selected. Some parameters are required. Answer each parameter, as applicable.

8. At the bottom of the screen, click the "Run Document" button. At this point, the system will begin to process the report. The process can take several minutes. You have the option of adding the report to your History List (see graphic below). Once the report is added to the History List, you can retrieve it at a later time by clicking on the History List link in the MicroStrategy menu located at the top of the window.
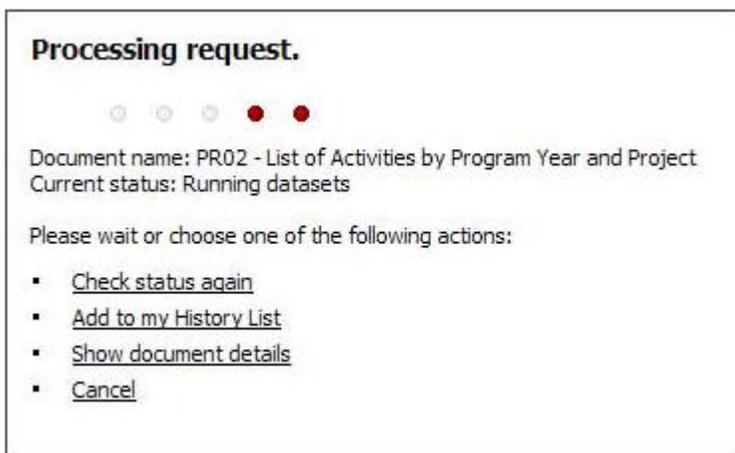
9. Once the report is ready, the system will display the report based on the options selected in the steps above (MicroStrategy, Excel, or PDF).