

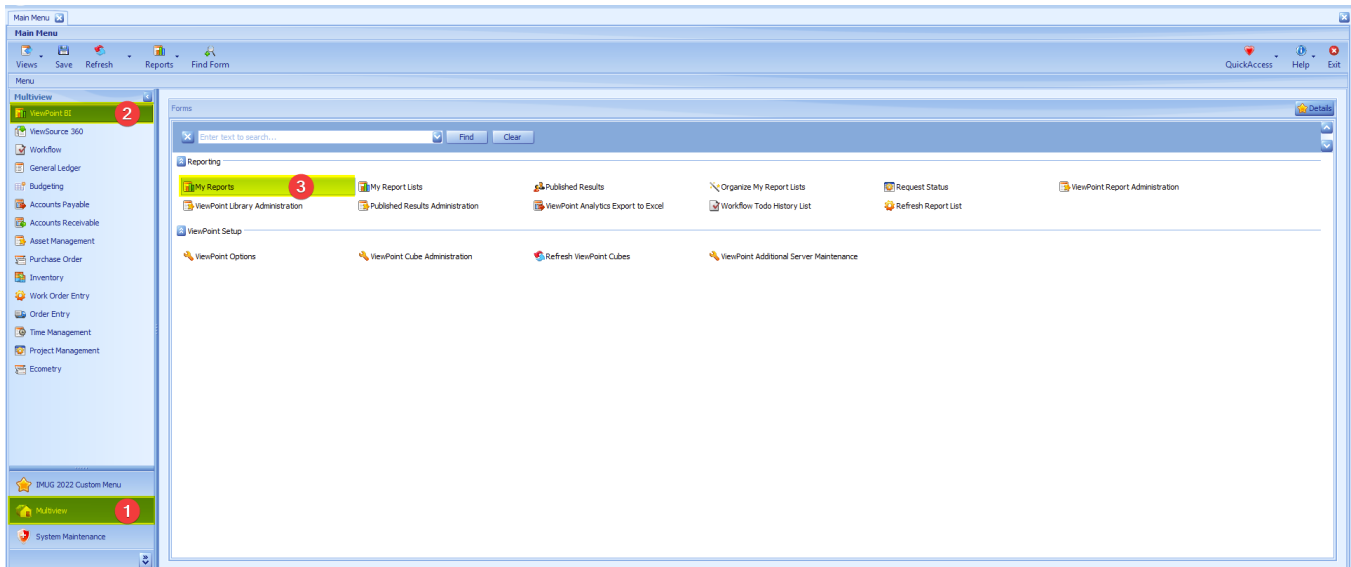
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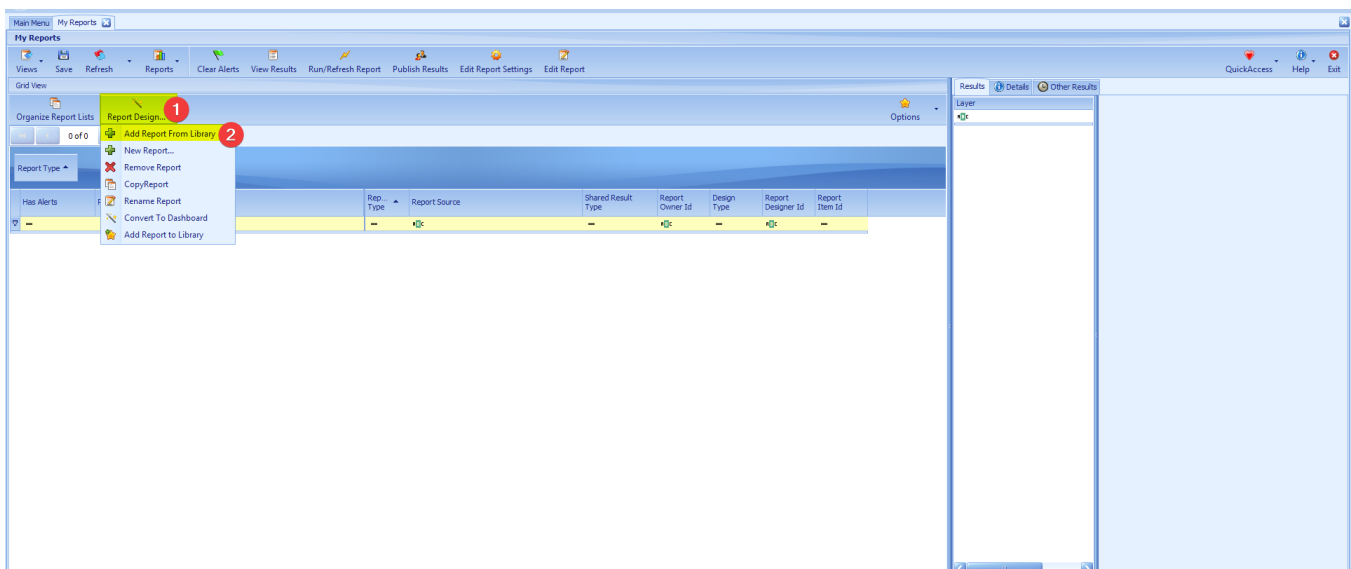
Detailed Reports – Basics

Adding New Reports from Multiview Library

Multiview has a general list of Detail Reports that can be added to your “My Reports” module. To add these reports, navigate to Multiview > ViewPoint BI > My Reports. Select the module to display all the reports that you currently have.



New reports can be added by selected Report Designer > Add Report From Library.



All reports will be shown. The Multiview standard reports are located on the left-hand panel with stars.

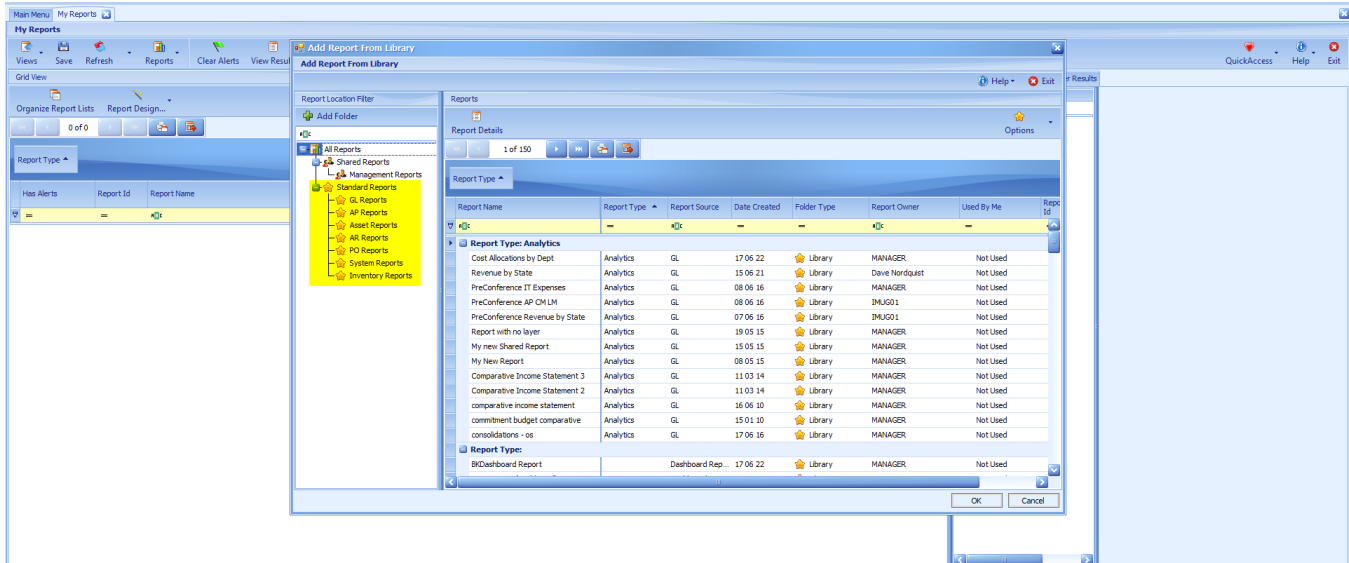
Detailed Reports - Basics

Time: 13:00 - 14:00

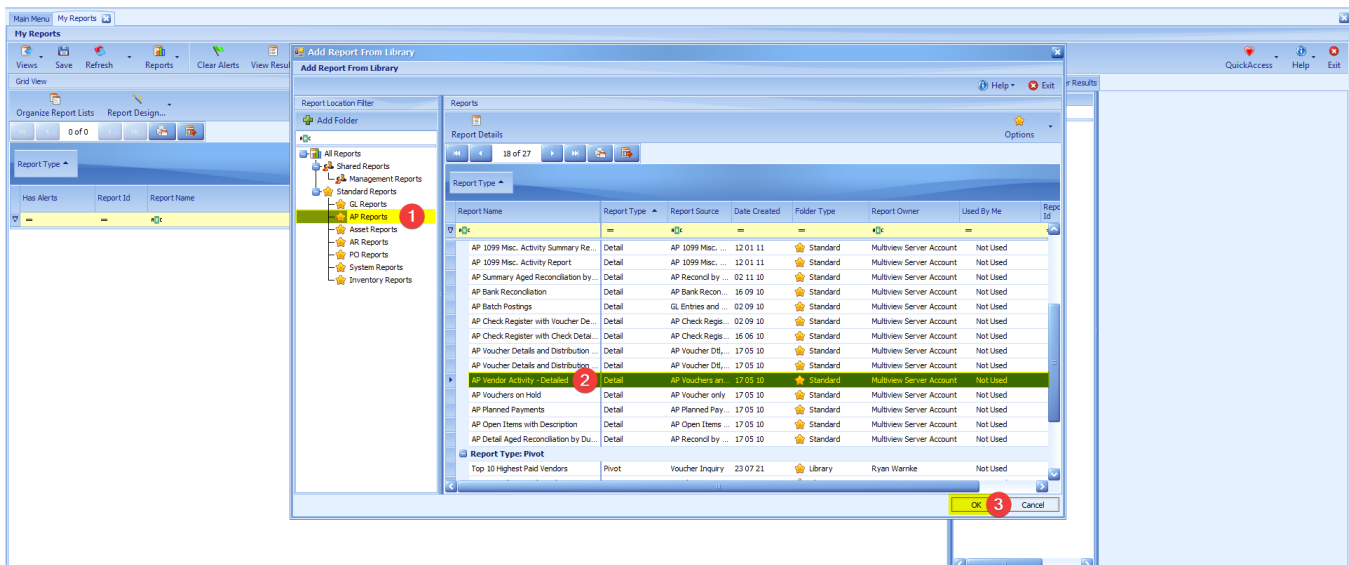
Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



We will be demonstrating how to add a new standard report and run it for the first time using the AP Vendor Activity – Detailed report. This can be added to your “My Reports” by selecting AP Reports > AP Vendor Activity – Detailed > OK.



The newly added report will now appear in your “My Reports” module. You can search for the report name to easily find the report. This helps if you already have many reports in “My Reports”.

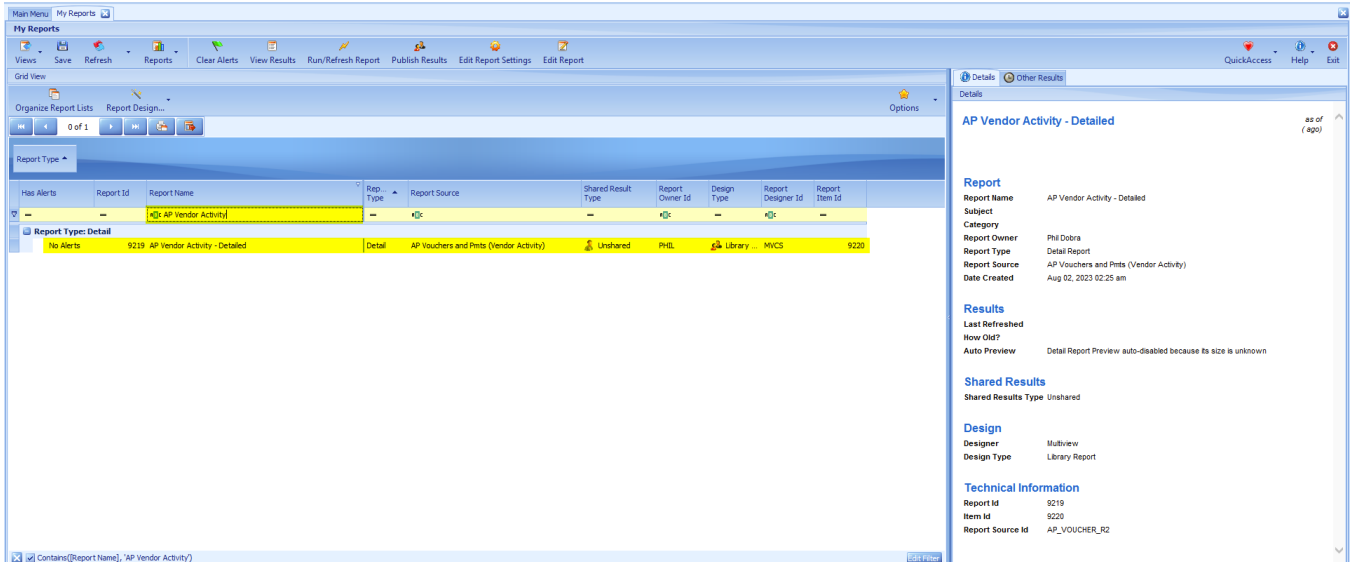
Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

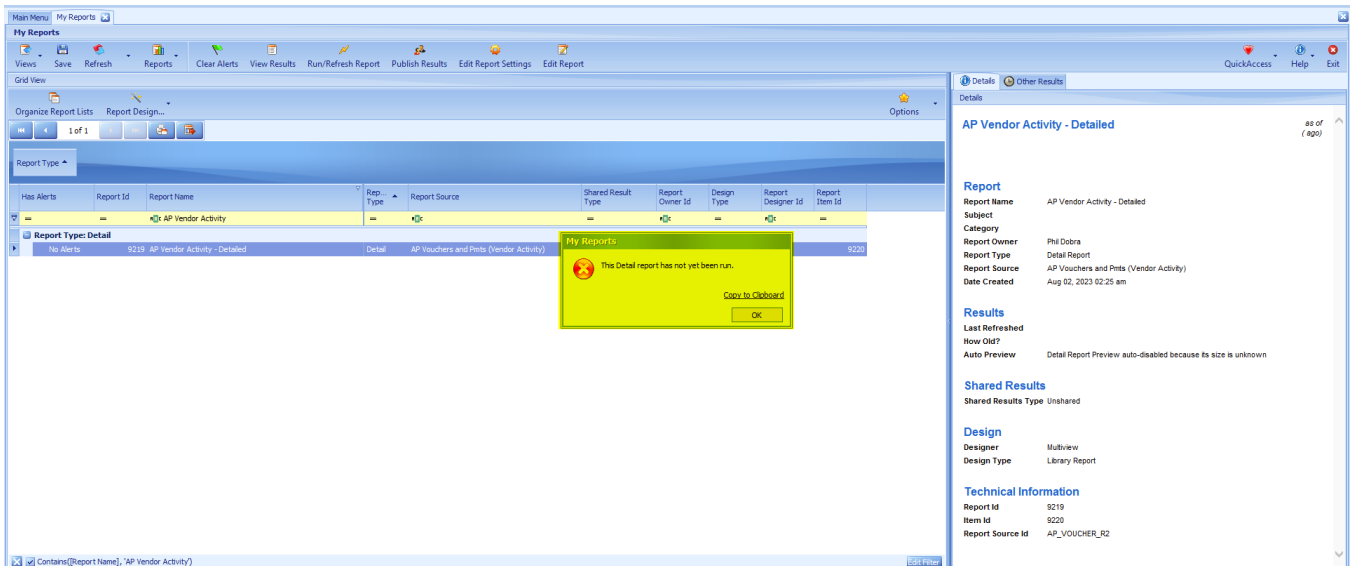
Date: Tuesday, October 17, 2023



The screenshot shows the 'My Reports' window in the Multiview Financial Software. The 'AP Vendor Activity - Detailed' report is selected. The report details on the right show:

- Report Name:** AP Vendor Activity - Detailed
- Subject:** AP Vendor Activity - Detailed
- Category:** Phil Dobra
- Report Owner:** Phil Dobra
- Report Type:** Detail Report
- Report Source:** AP Vouchers and Prints (Vendor Activity)
- Date Created:** Aug 02, 2023 02:25 am
- Shared Results:** Shared Results Type Unshared
- Design:** Designer Multiview, Design Type Library Report
- Technical Information:** Report Id 9219, Item Id 9220, Report Source Id AP_VOUCHER_R2

When running the report for the first time, you will have to first Run/Refresh the report. If you double click the report before Run/Refreshing, you will receive the error below.



The screenshot shows the 'My Reports' window in the Multiview Financial Software. The 'AP Vendor Activity - Detailed' report is selected. A yellow error dialog box is displayed in the center, stating:

My Reports:
This Detail report has not yet been run.

The dialog box has a 'Copy to Clipboard' button and an 'OK' button.

If you encounter this error, press "OK" and then Run/Refresh the report.

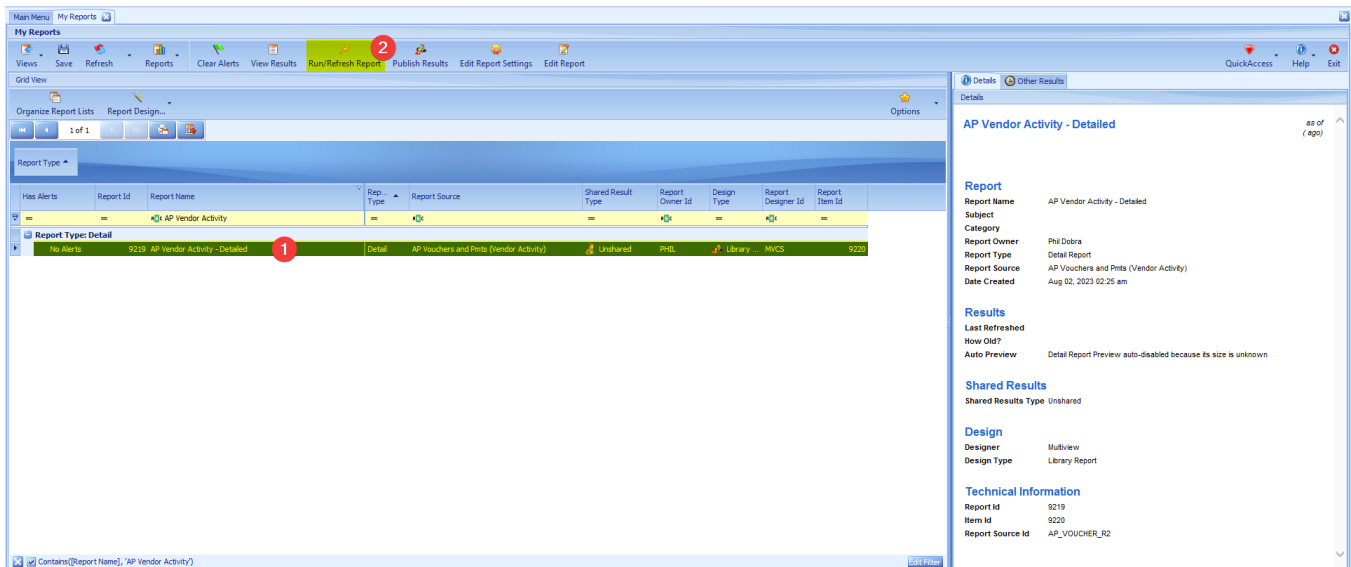
Detailed Reports - Basics

Time: 13:00 - 14:00

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Time: 10:00 - 11:00

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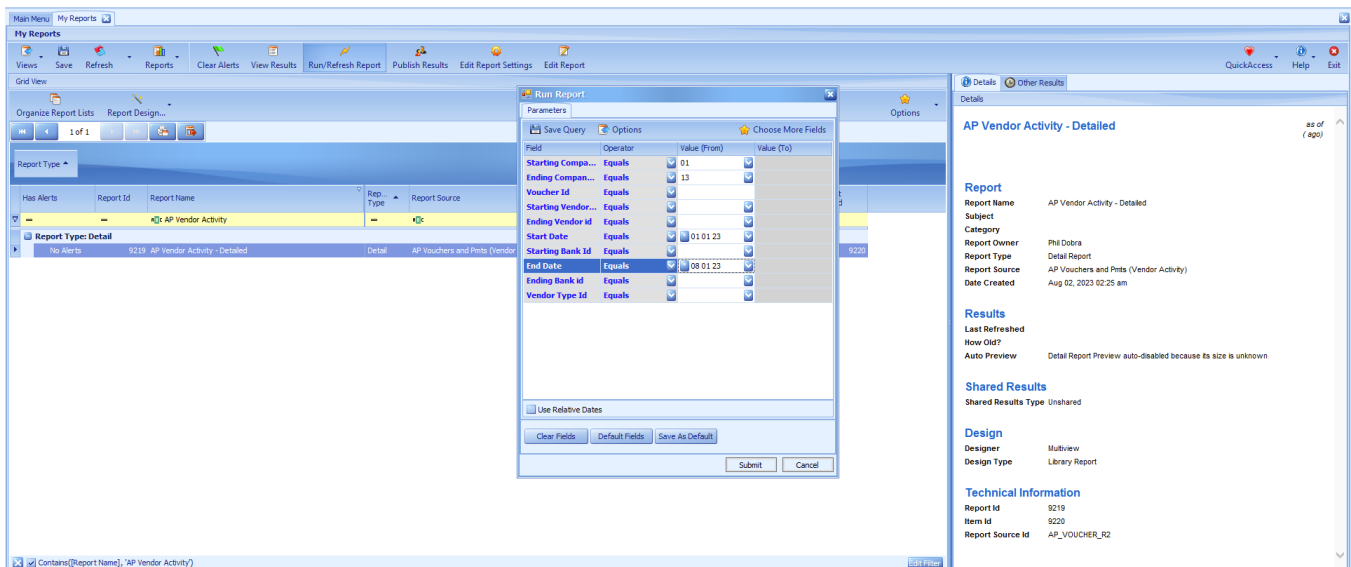


The screenshot shows the 'My Reports' window in Multiview Financial Software. The 'Run/Refresh Report' button is highlighted with a red circle 2. The 'AP Vendor Activity - Detailed' report is selected, indicated by a red circle 1. The report details on the right include:

- Report Name:** AP Vendor Activity - Detailed
- Subject:** AP Vendor Activity - Detailed
- Category:** AP Vendor Activity - Detailed
- Report Owner:** Phil Dobra
- Report Type:** Detail Report
- Report Source:** AP Vouchers and Prints (Vendor Activity)
- Date Created:** Aug 02, 2023 02:25 am
- Results:** Last Refreshed: How Old? Auto Preview: Detail Report Preview auto-disabled because its size is unknown
- Shared Results:** Shared Results Type: Unshared
- Design:** Designer: Multiview Design Type: Library Report
- Technical Information:** Report Id: 9219 Item Id: 9220 Report Source Id: AP_VOUCHER_R2

Entering Search Parameters to a Report

You will be prompted to enter a search parameter when adding a new report after selecting “Run/Refresh Report”.



The screenshot shows the 'Run Report' dialog box in Multiview Financial Software. The 'Parameters' tab is active, and the 'Choose More Fields' button is highlighted. The search parameters entered are:

Field	Operator	Value (From)	Value (To)
Starting Compa...	Equals	01	
Ending Compa...	Equals	13	
Voucher Id	Equals		
Starting Vendor...	Equals		
Ending Vendor Id	Equals		
Start Date	Equals	01 01 23	
Starting Bank Id	Equals		
End Date	Equals	08 01 23	
Ending Bank Id	Equals		
Vendor Type Id	Equals		

The 'Use Relative Dates' checkbox is checked. The 'Clear Fields', 'Default Fields', and 'Save As Default' buttons are visible at the bottom of the dialog box.

If there are additional parameters that you would like to include, you can select the “Choose More Fields” button to show additional search parameters. Please note that depending on the report, there may not be additional search parameters to add. In this report (AP Vendor Activity – Detailed), all the search parameters are already displayed.

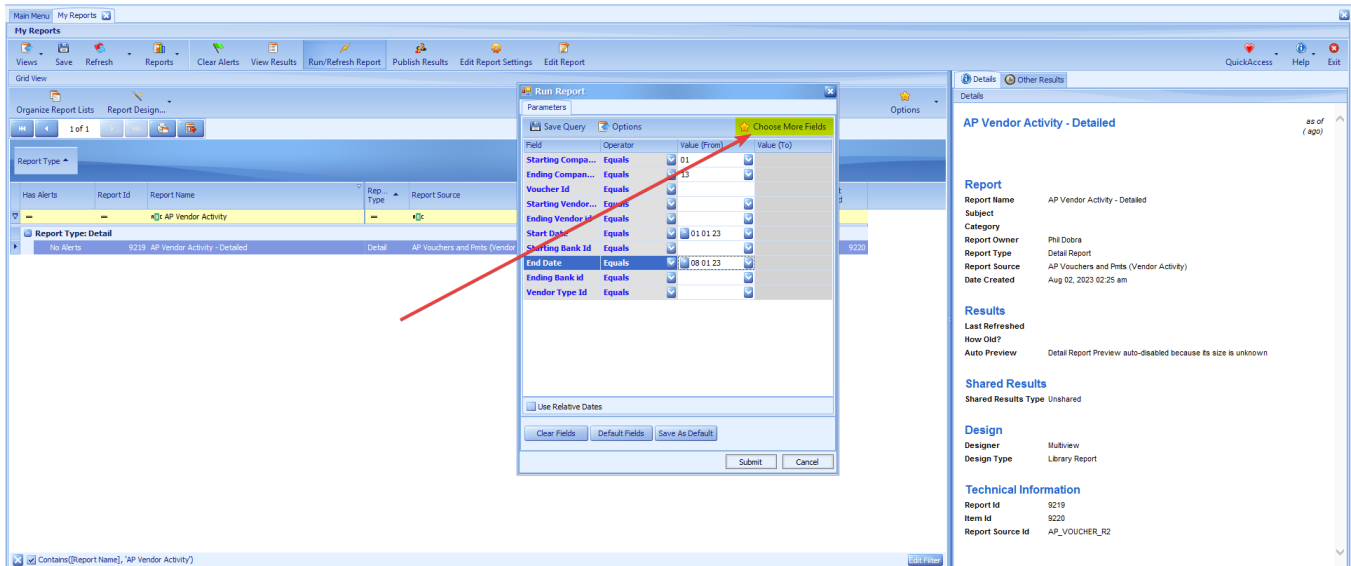
Detailed Reports - Basics

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Time: 10:00 - 11:00

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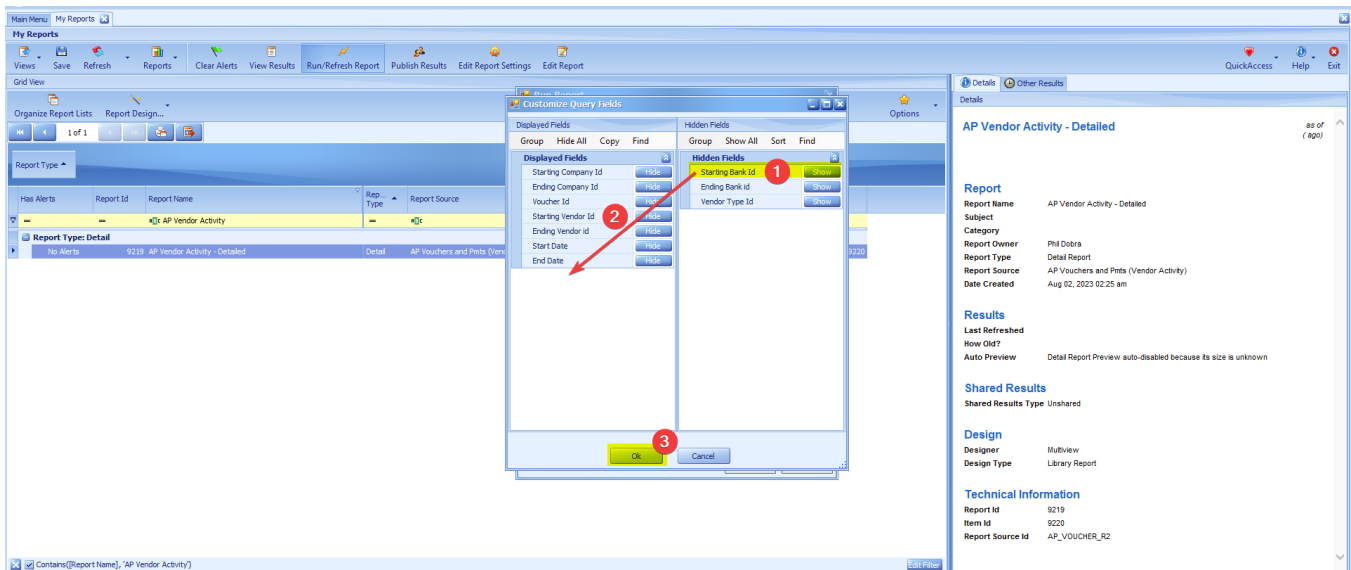


The screenshot shows the 'Run Report' dialog box with the following fields listed:

Field	Operator	Value (From)	Value (To)
Starting Company	Equals	01	
Ending Company	Equals	13	
Voucher Id	Equals		
Starting Vendor	Equals		
Start Date	Equals	01 01 23	
Ending Bank Id	Equals		
End Date	Equals	08 01 23	
Vendor Type Id	Equals		

The 'Choose More Fields' button is highlighted in the top right corner of the dialog.

However, if there are other search parameters in other reports, you can add them to your search by clicking and dragging the field to the left side and pressing “OK”.



The screenshot shows the 'Customize Query Fields' dialog box with the following fields listed:

Group	Hide All	Copy	Find
Displayed Fields			
Starting Company Id	hide		
Ending Company Id	hide		
Voucher Id	hide		
Starting Vendor Id	hide		
Ending Vendor Id	hide		
Start Date	hide		
End Date	hide		
Hidden Fields			
Starting Bank Id	hide		
Ending Bank Id	hide		
Vendor Type Id	hide		

The 'Starting Bank Id' field is being dragged from the 'Hidden Fields' list to the 'Displayed Fields' list. The 'OK' button is highlighted in the bottom right corner of the dialog.

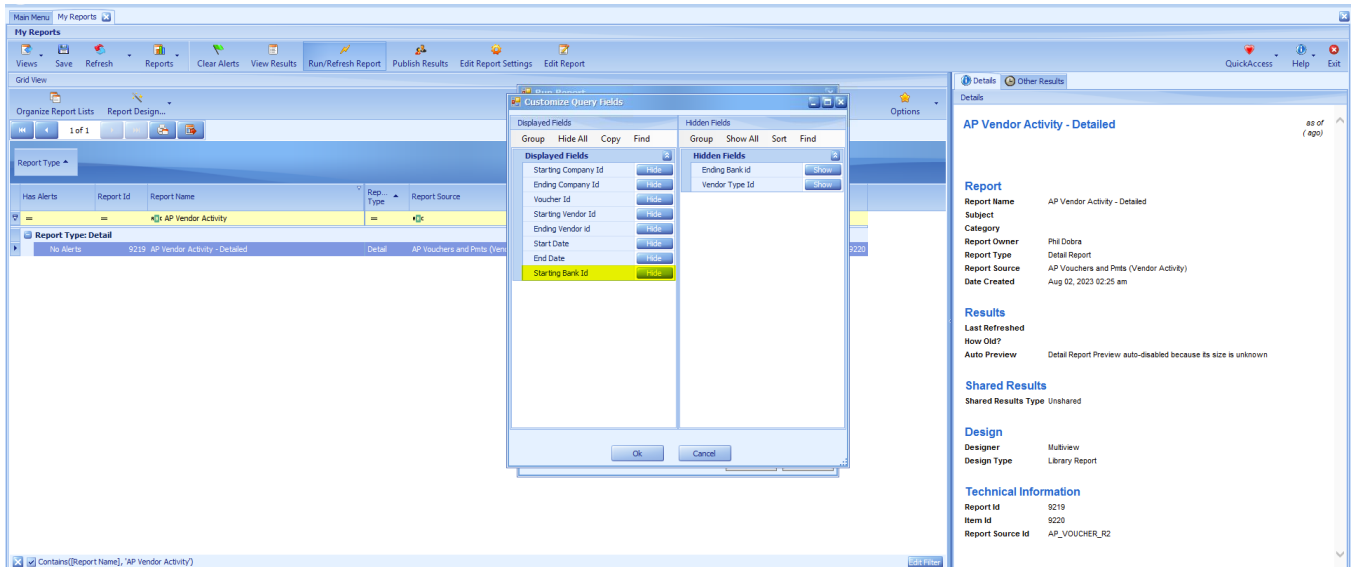
Detailed Reports - Basics

Time: 13:00 - 14:00

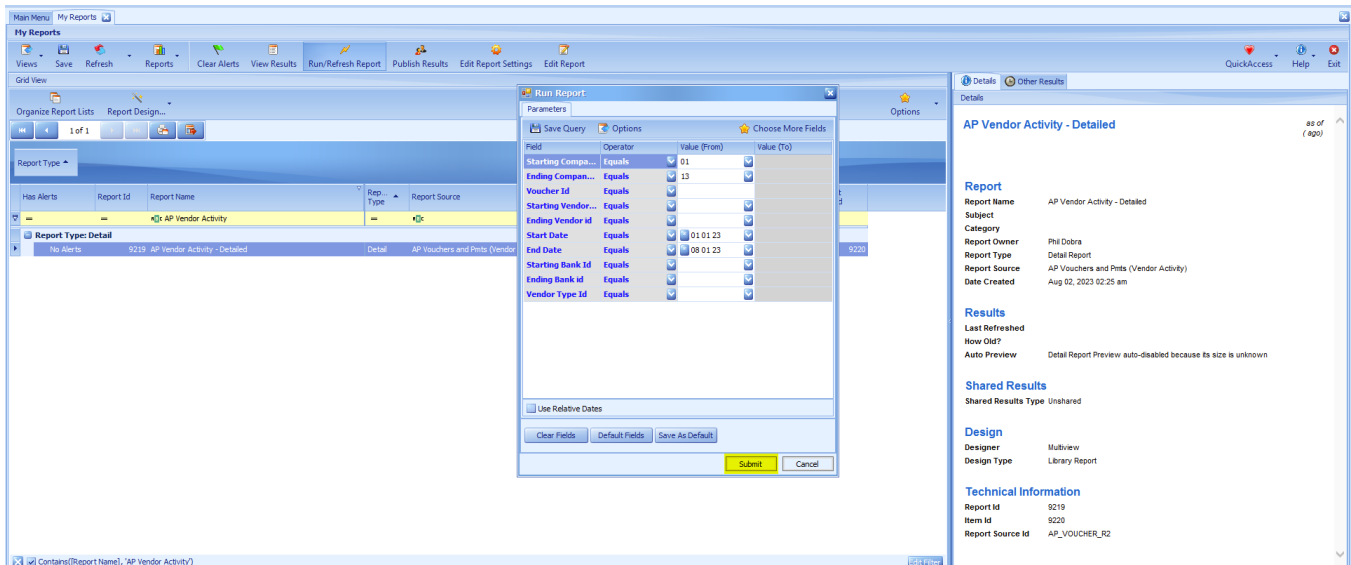
Date: Monday, October 16, 2023

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Once you have entered your search parameters, press “Submit” to run your report for the first time.



Field	Operator	Value (From)	Value (To)
Starting Company...	Equals	01	
Ending Company...	Equals	13	
Voucher Id	Equals		
Starting Vendor...	Equals		
Ending Vendor id	Equals		
Start Date	Equals	01 01 23	
End Date	Equals	08 01 23	
Starting Bank Id	Equals		
Ending Bank id	Equals		
Vendor Type Id	Equals		

The report output will display.

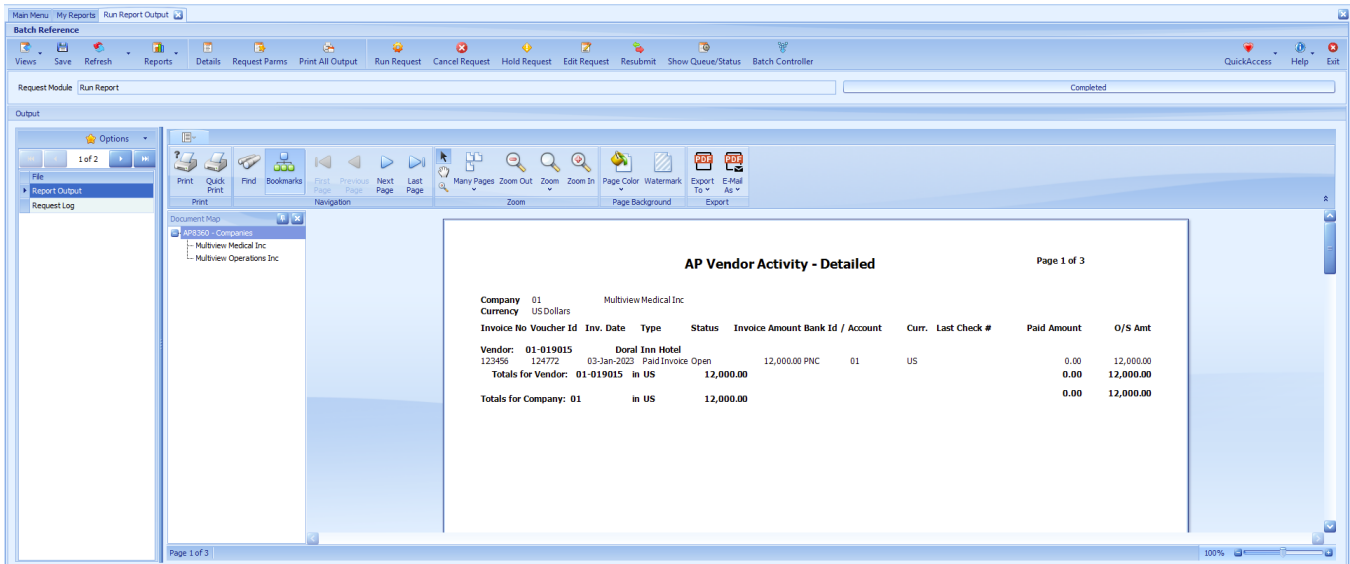
Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

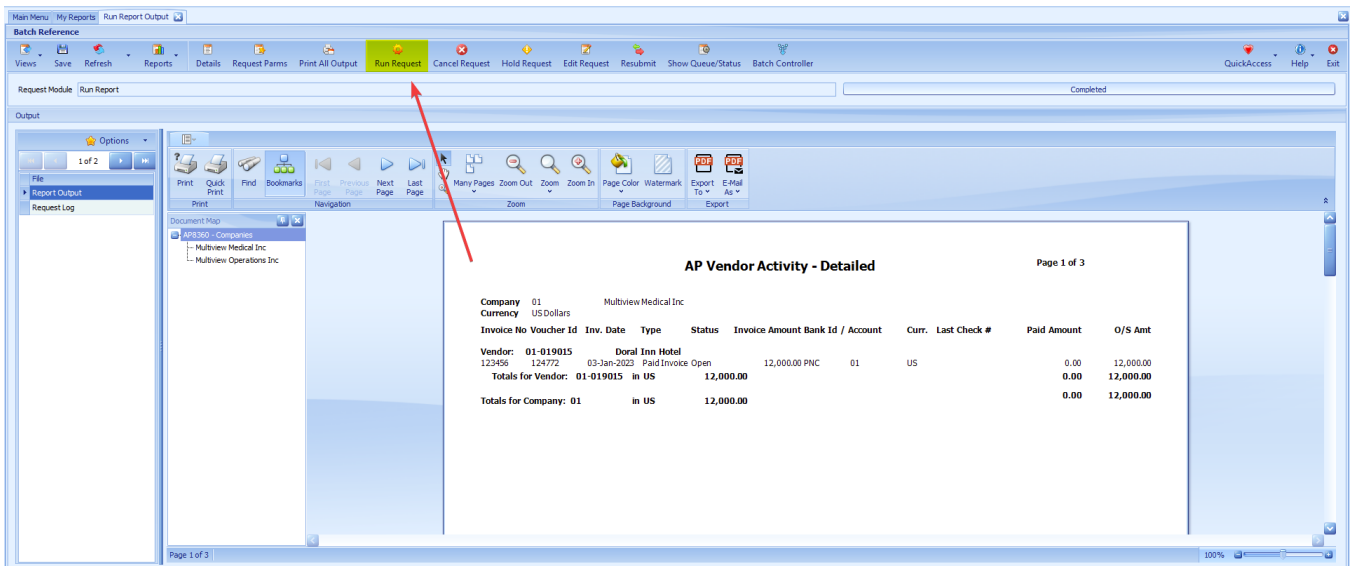
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AP Vendor Activity - Detailed Page 1 of 3

Company	01	Multiview Medical Inc									
Currency	US Dollars										
Invoice No	Voucher Id	Inv. Date	Type	Status	Invoice Amount	Bank Id	Account	Curr.	Last Check #	Paid Amount	O/S Amt
Vendor: 01-019015			Doral Inn Hotel								
123456	124772	03-Jan-2023	Paid Invoice Open		12,000.00	PNC	01	US		0.00	12,000.00
Totals for Vendor:	01-019015	in US			12,000.00					0.00	12,000.00
Totals for Company:	01	in US			12,000.00						

If you would like to enter new search parameters, you can select “Run Request” on the navigation bar and select new search parameters. The process will be the same as previously mentioned.



AP Vendor Activity - Detailed Page 1 of 3

Company	01	Multiview Medical Inc									
Currency	US Dollars										
Invoice No	Voucher Id	Inv. Date	Type	Status	Invoice Amount	Bank Id	Account	Curr.	Last Check #	Paid Amount	O/S Amt
Vendor: 01-019015			Doral Inn Hotel								
123456	124772	03-Jan-2023	Paid Invoice Open		12,000.00	PNC	01	US		0.00	12,000.00
Totals for Vendor:	01-019015	in US			12,000.00					0.00	12,000.00
Totals for Company:	01	in US			12,000.00						

Exporting a Report

Once a Detailed Report is created, it can be exported to other programs for easier data manipulation. Select “Export To” and select the program you would like to export to. In this example, I will export this report to PDF.

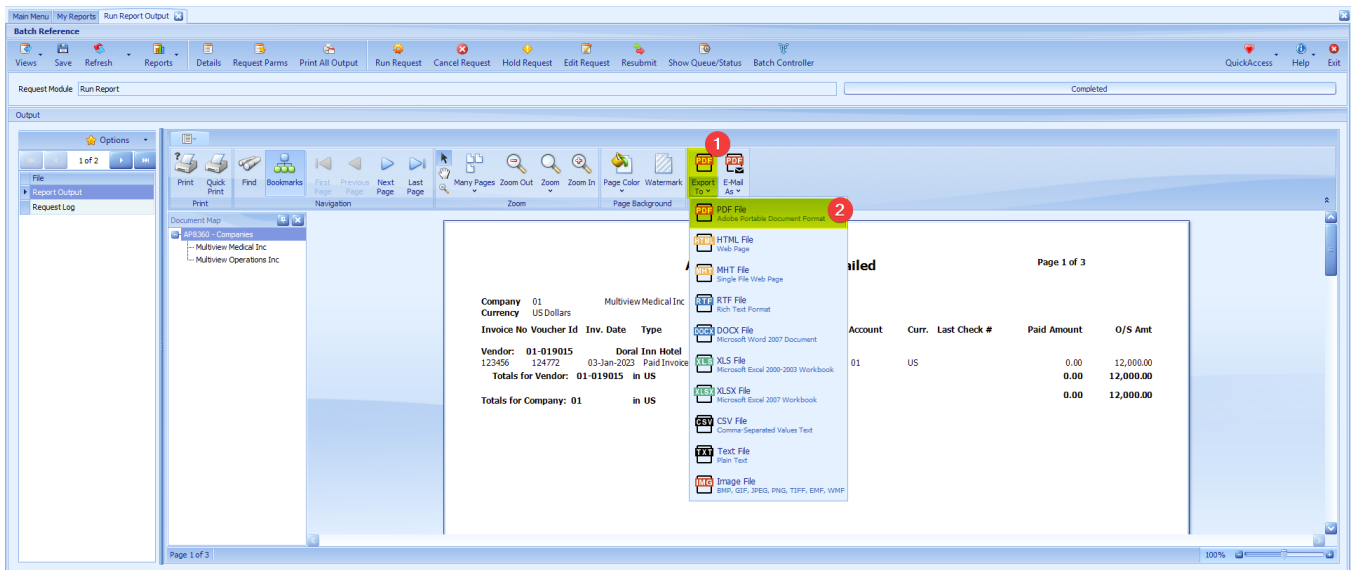
Detailed Reports - Basics

Time: 13:00 - 14:00

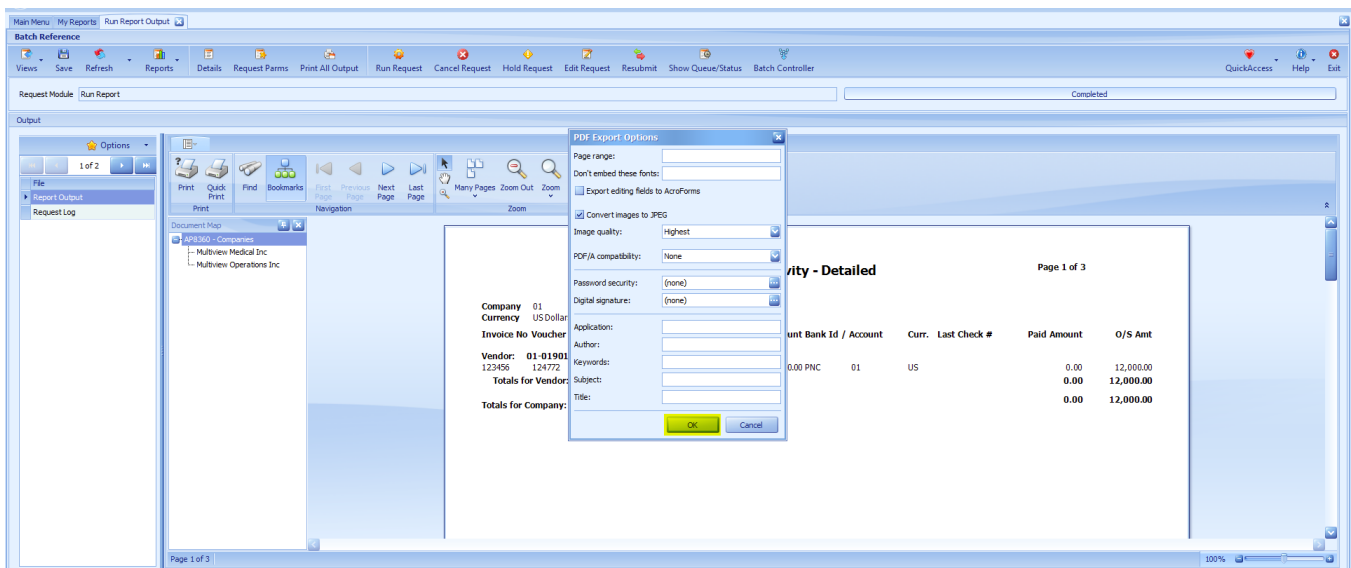
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Select the export options you would like to include. This will vary depending on the export format. Once satisfied, select “OK” to complete the export.



After selecting “OK”, Multiview will prompt you to name the file and save it in your Temporary Files folder. The steps are shown below.

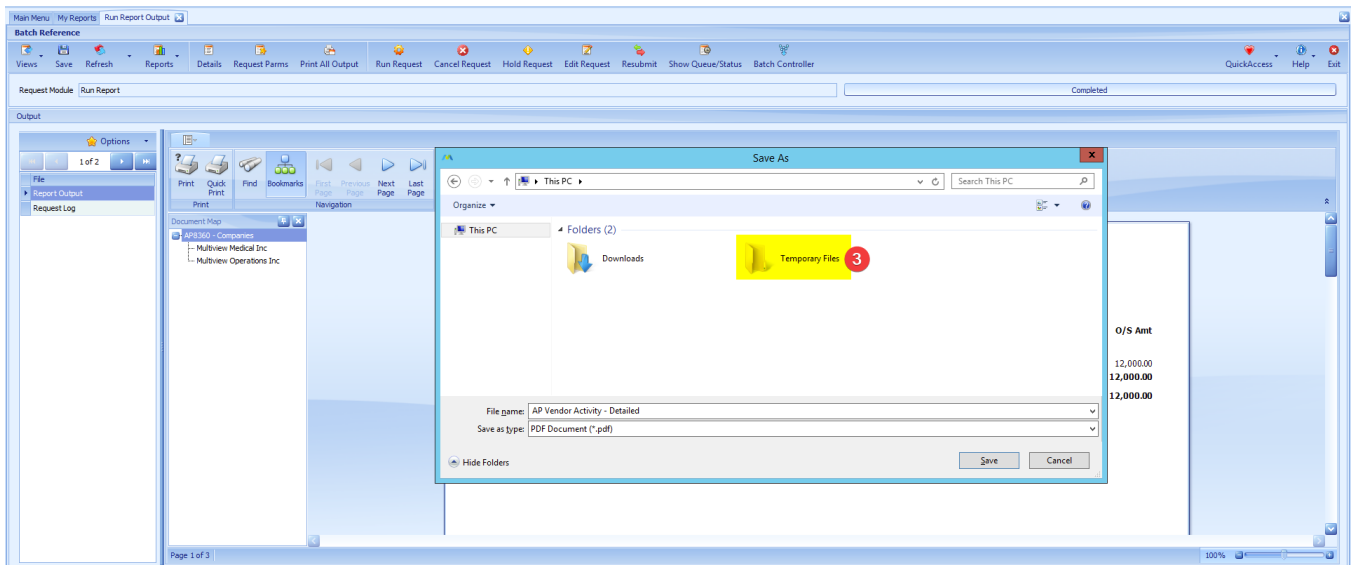
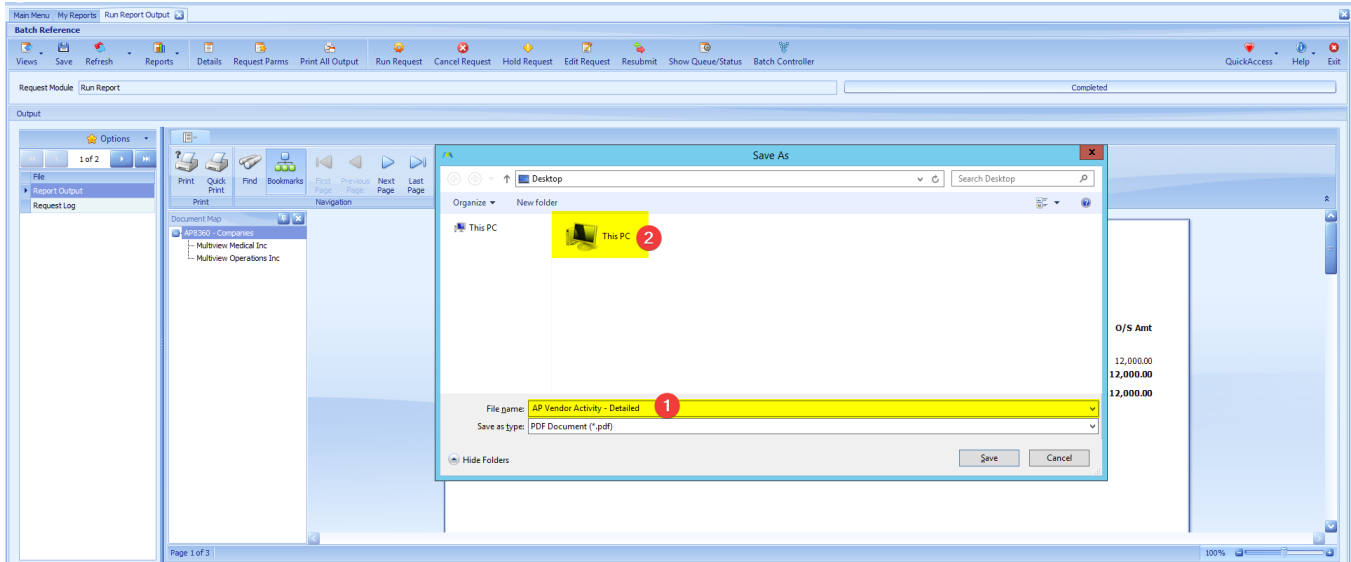
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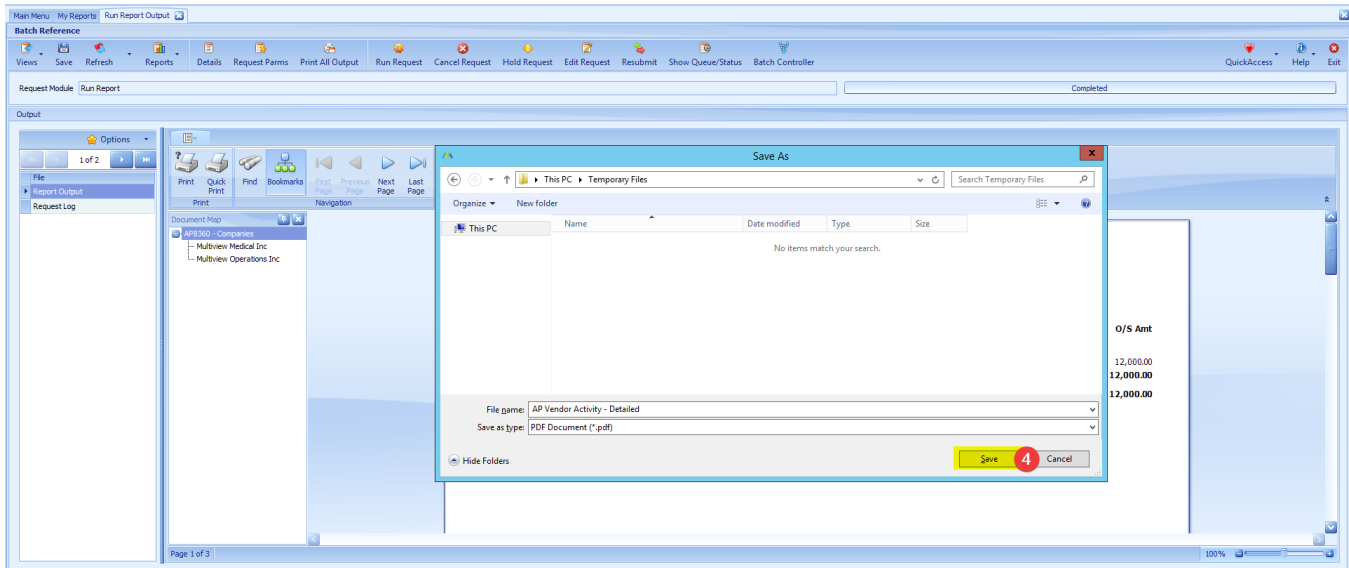
Detailed Reports - Basics

Time: 13:00 - 14:00

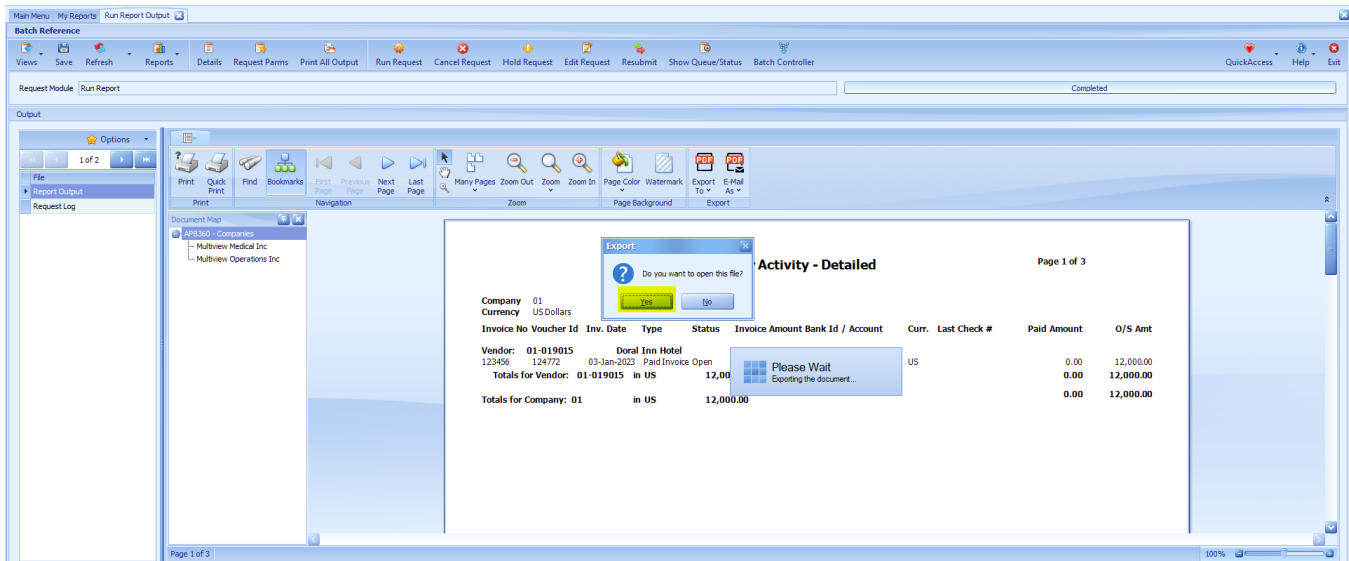
Date: Monday, October 16, 2023

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Once saved, Multiview will prompt you to open the file. You can open the export here, or if you have other reports that you would like to export, you can export those as well and retrieve them from your Temporary Files folder.



Opening Files from the Temporary Files Folder

Exported files can be retrieved from the Temporary Files folder by first opening the Temporary Files, then selecting the Temporary Files folder, then selecting the export.

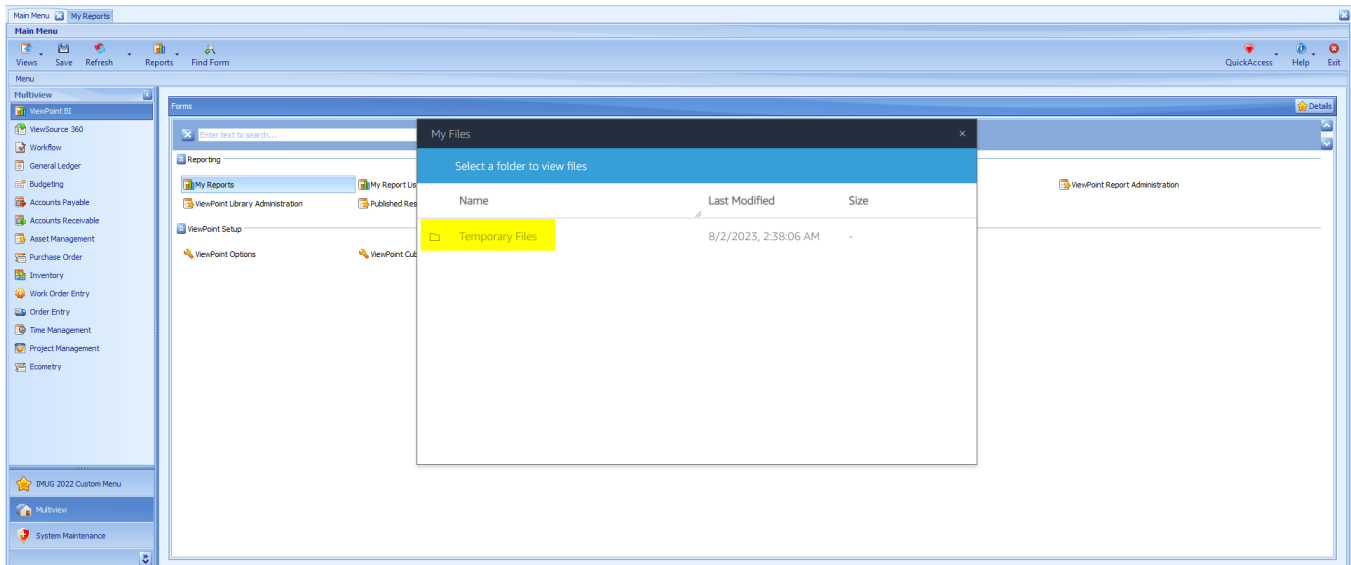
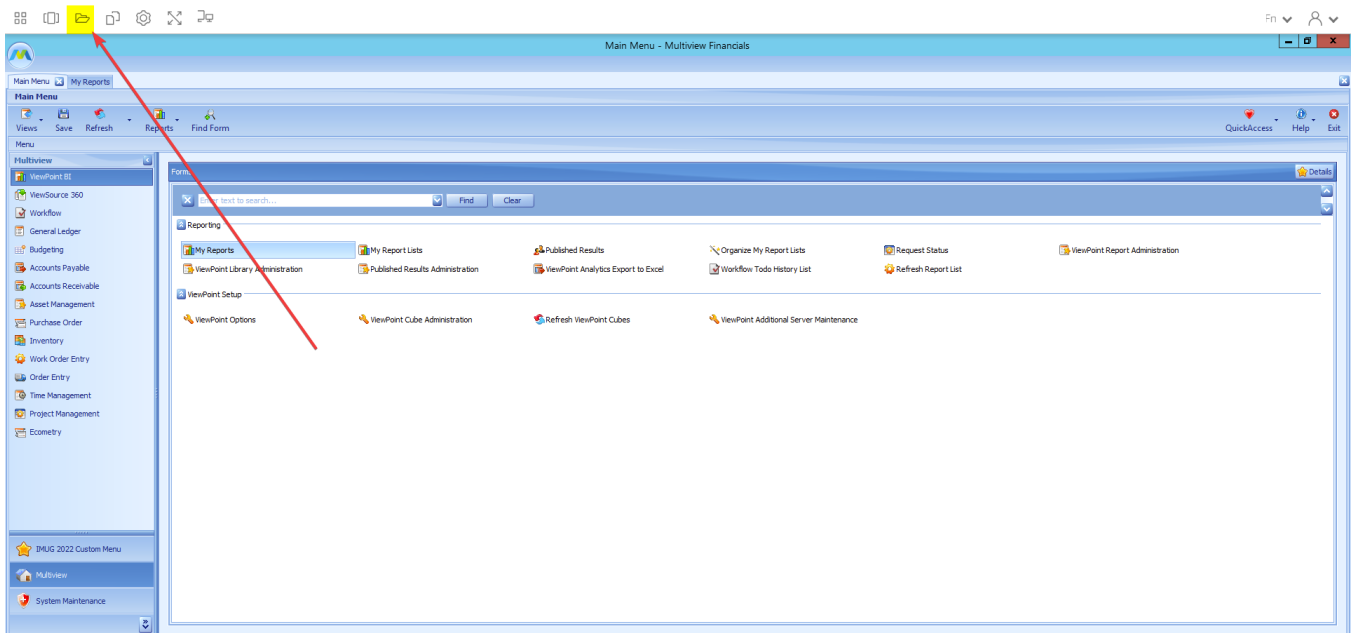
Detailed Reports - Basics

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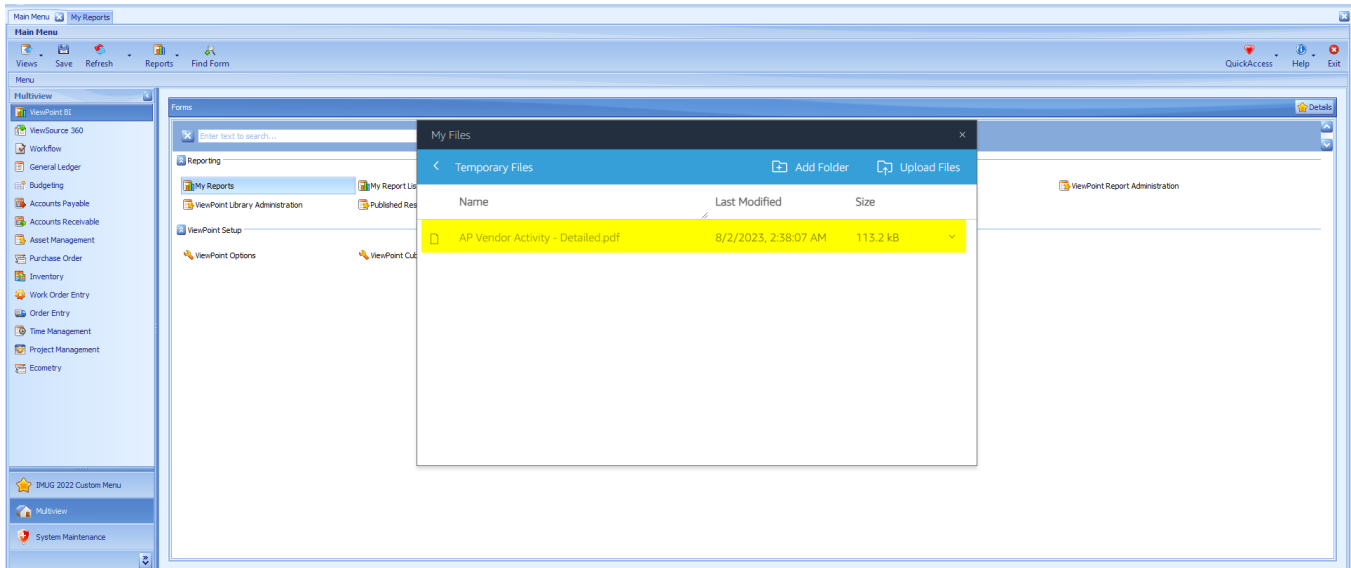
Detailed Reports - Basics

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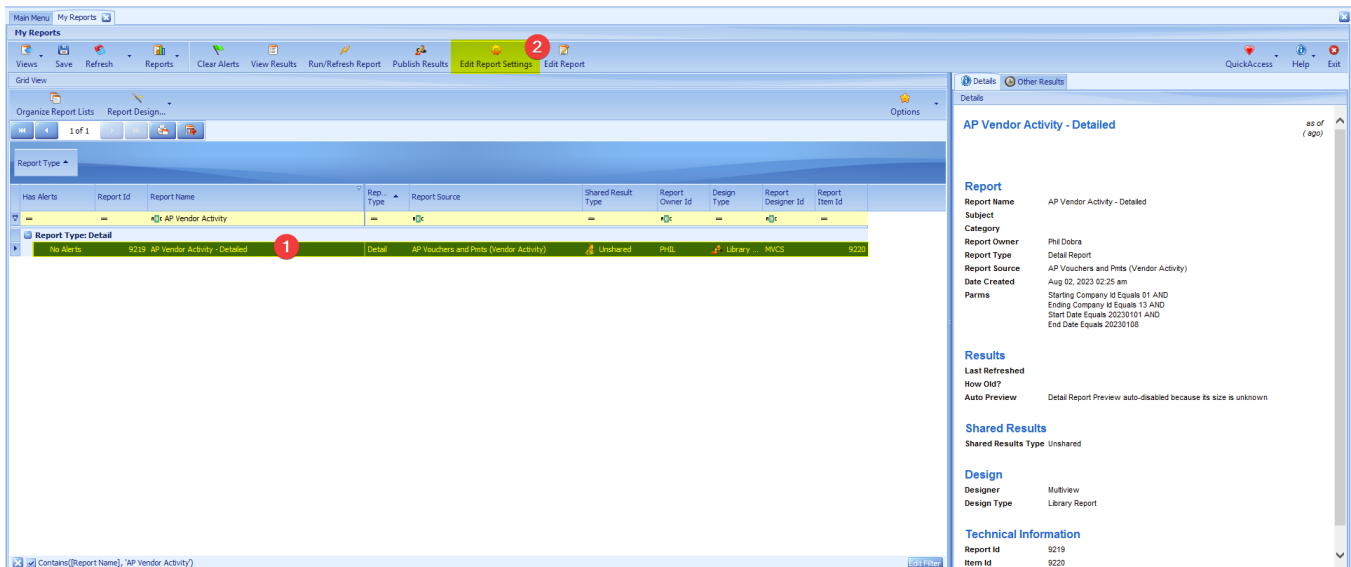
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Sharing Reports

After creating a report, it can be shared in various ways. Select the report, then select “Edit Report Settings”.



A pop-up will appear allowing you to edit the report. Select “Sharing Results” and select the “View Security” option to choose the security. Reports can be shared by Owner Only, Everyone, Secured by Security Class, Secured by Role, and Secured by User Id. In the example below, I have chosen to share this report by User Id.

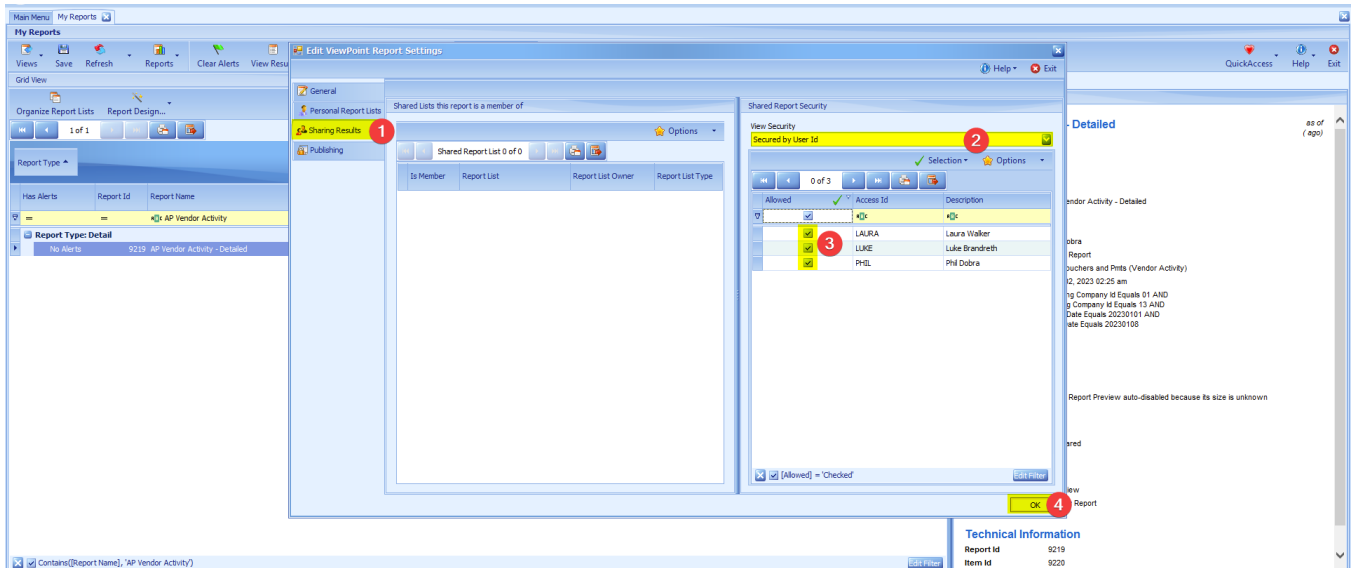
Detailed Reports - Basics

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Date: Monday, October 16, 2023

Time: 10:00 - 11:00

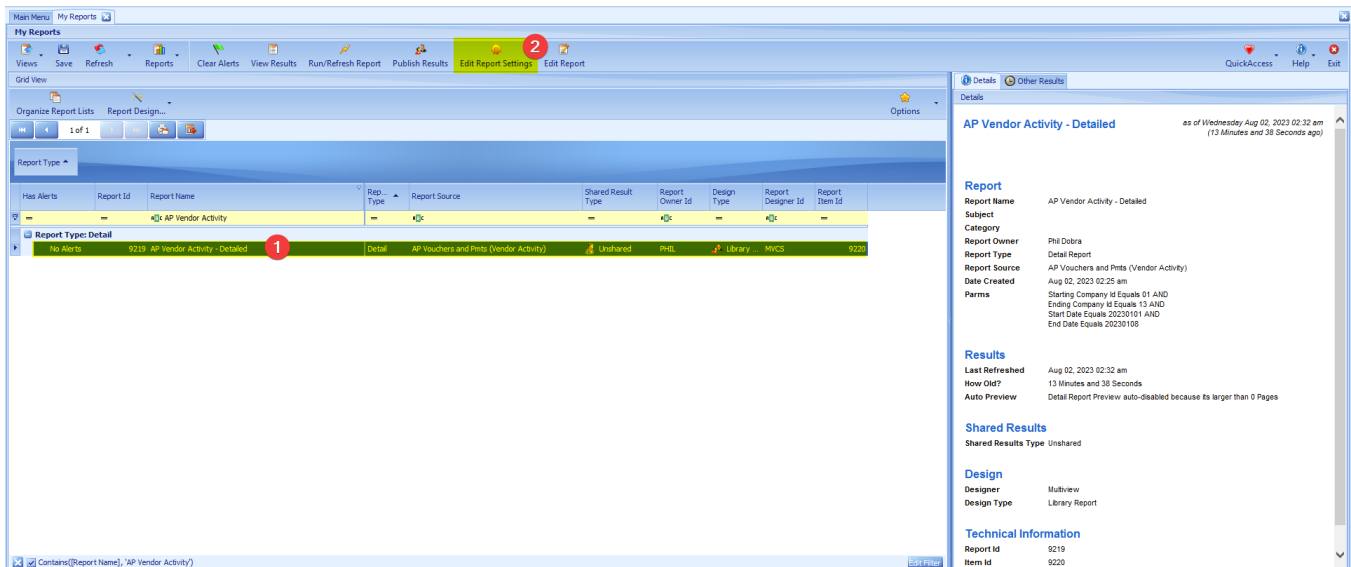
Date: Tuesday, October 17, 2023



Once you have selected how the report will be shared, select who has access to the report and press “OK”. Please note that you must select yourself as a User Id to share to. If not, the report will be shared to the other users that were specified, and not to yourself resulting in you not being able to see the report. After you select “OK”, the report will now be available for the specified individuals to view.

Renaming Reports

To rename reports from your My Reports module, select the report and select “Edit Report Settings”.



Rename the report and select “OK”.

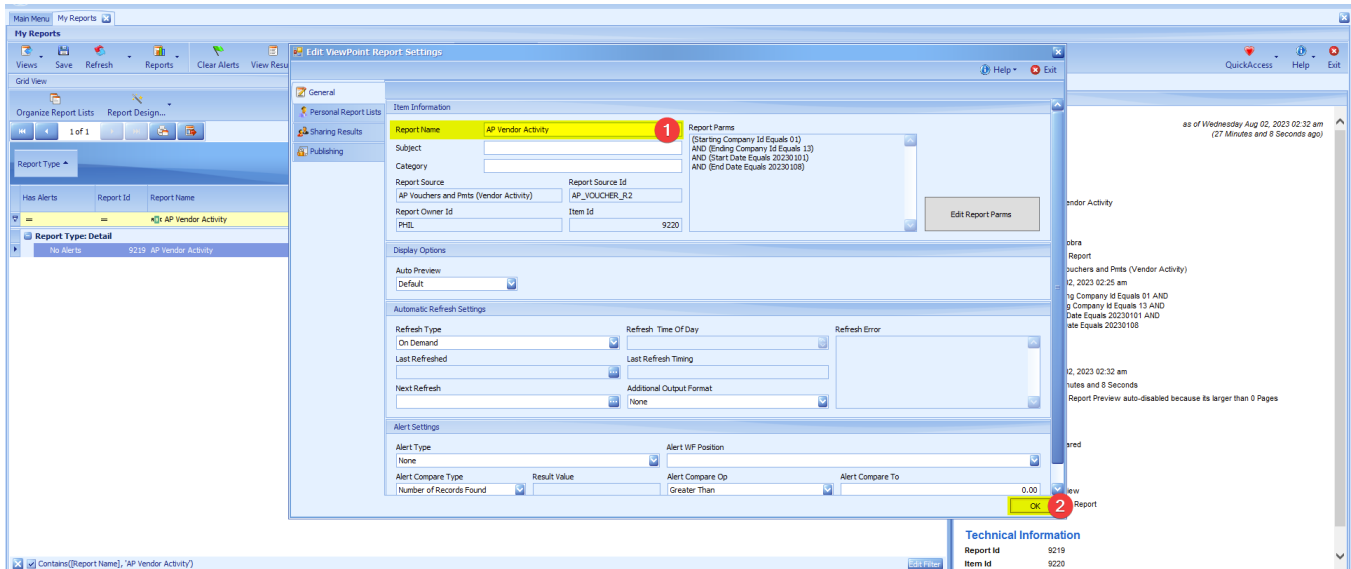
Detailed Reports - Basics

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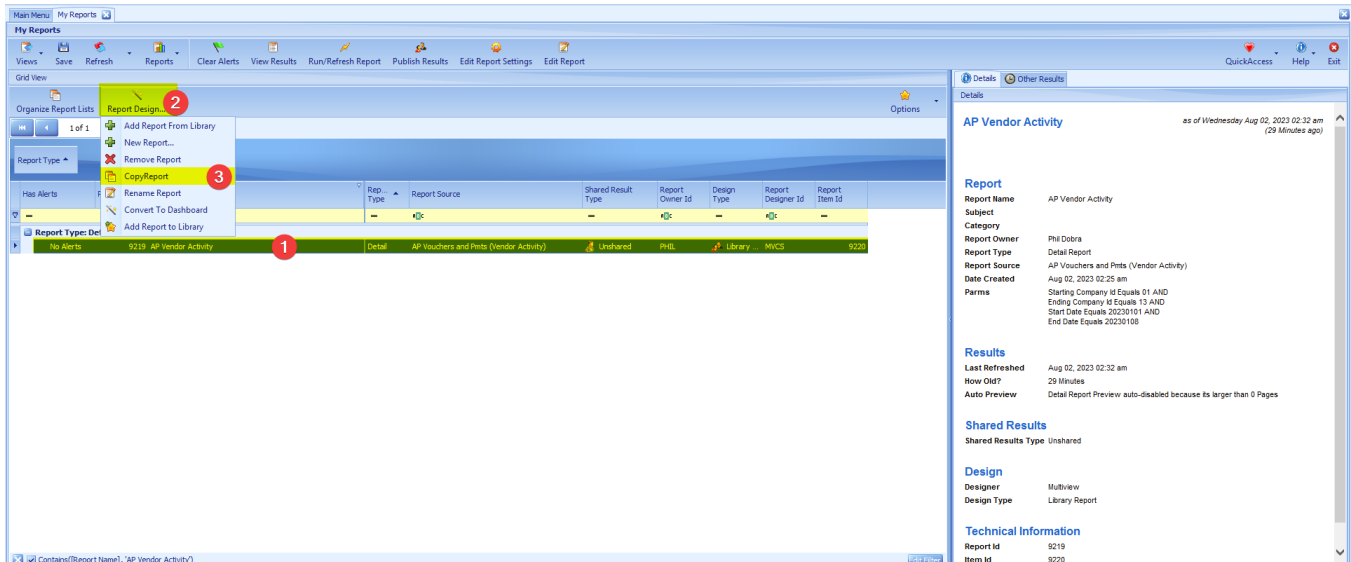
Time: 10:00 - 11:00

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Copying Report

A report can be copied from the My Reports module. This is useful if you would like to edit the report design of an already existing report or would like to have multiple reports to run different queries. To copy a report, select the report, then select "Report Designer". Select the Copy Report option from the pop-up.



You will receive a prompt to create a name for the report copy. Once you have entered a name, select "OK".

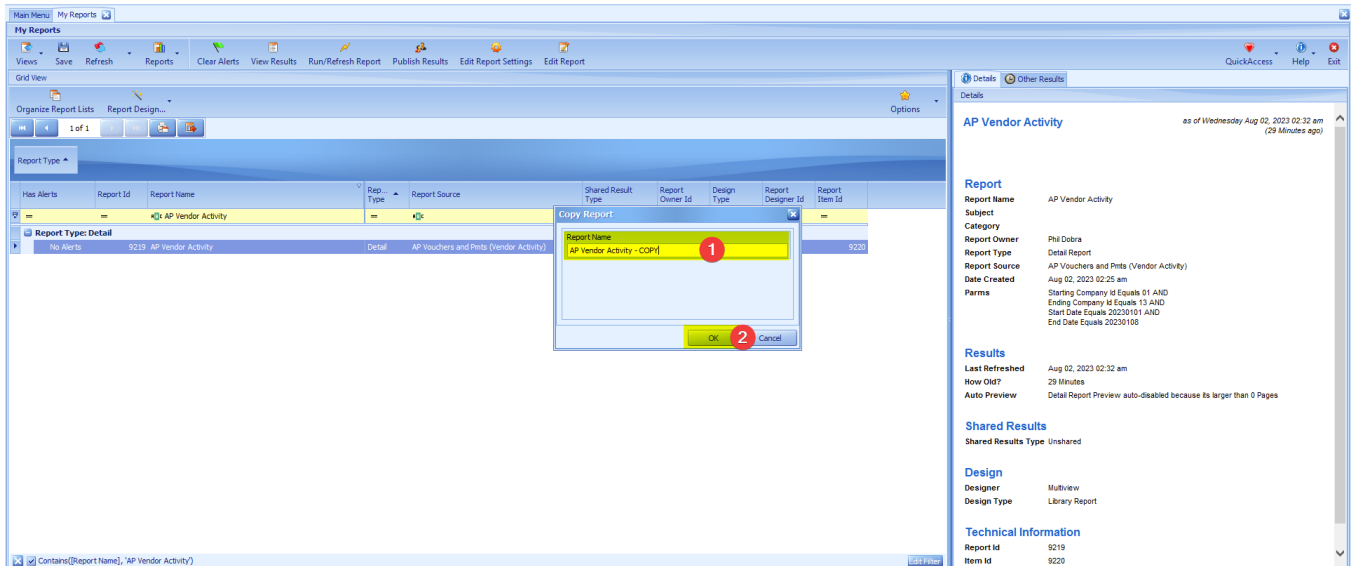
Detailed Reports - Basics

Time: 13:00 - 14:00

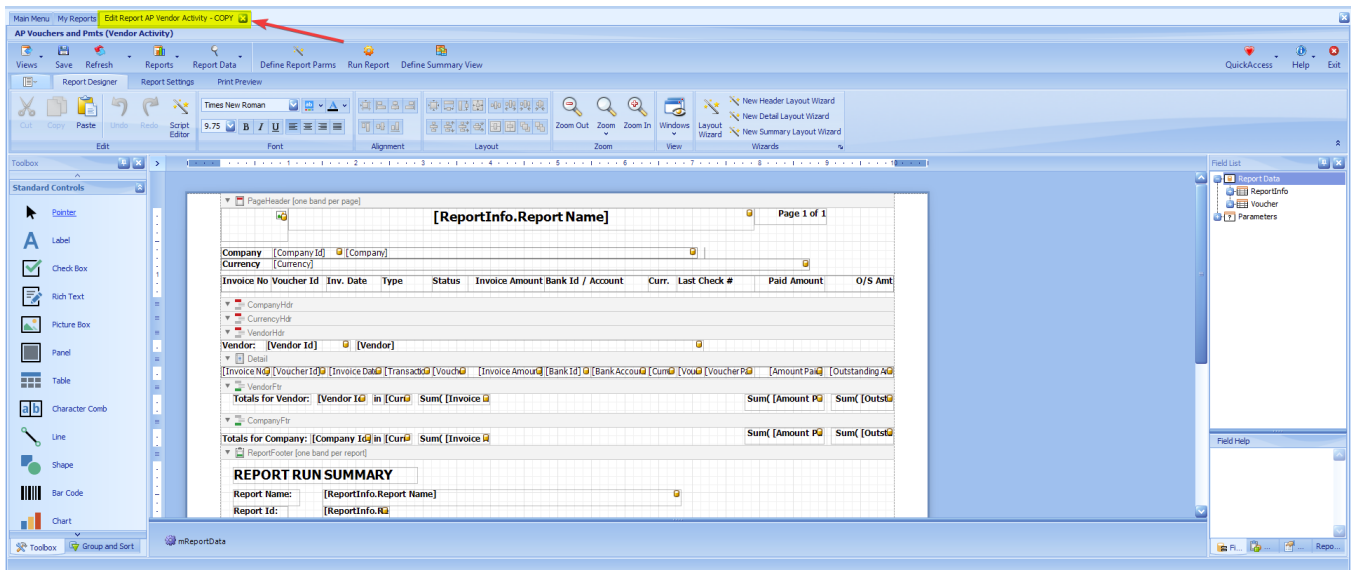
Date: Monday, October 16, 2023

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This action will open the Report Designer for the report copy. If you are satisfied with the design of the report, you can simply close the tab.



As seen below, a copy of the report has been created. Please note that your User Profile will be the owner of the copied report.

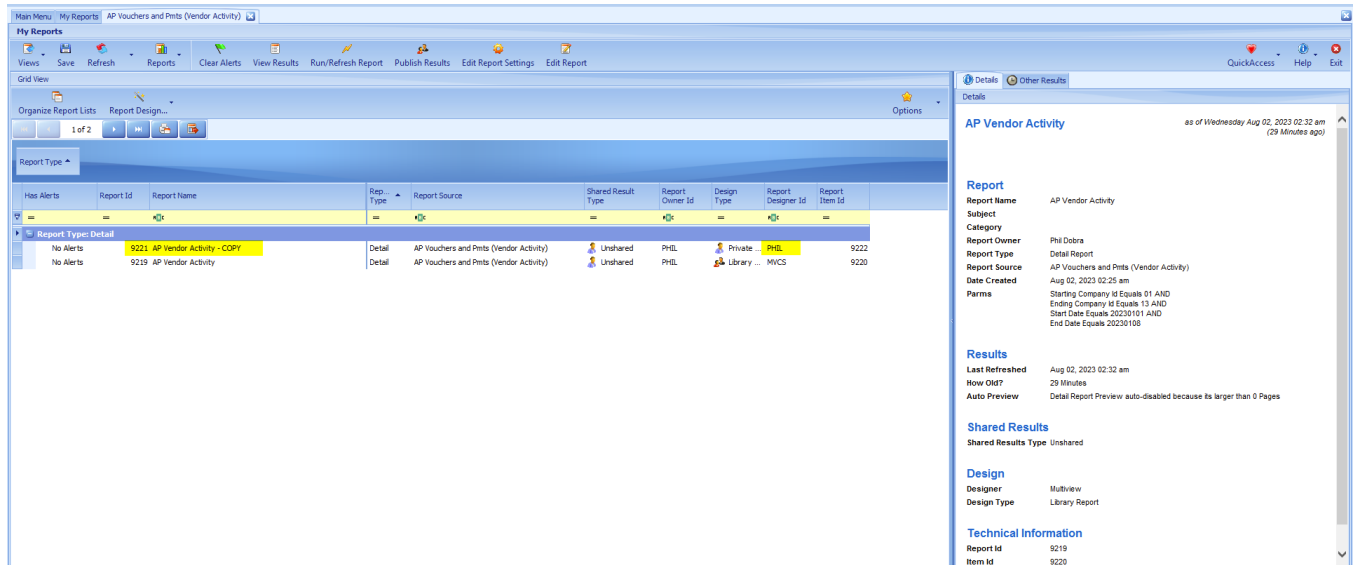
Detailed Reports - Basics

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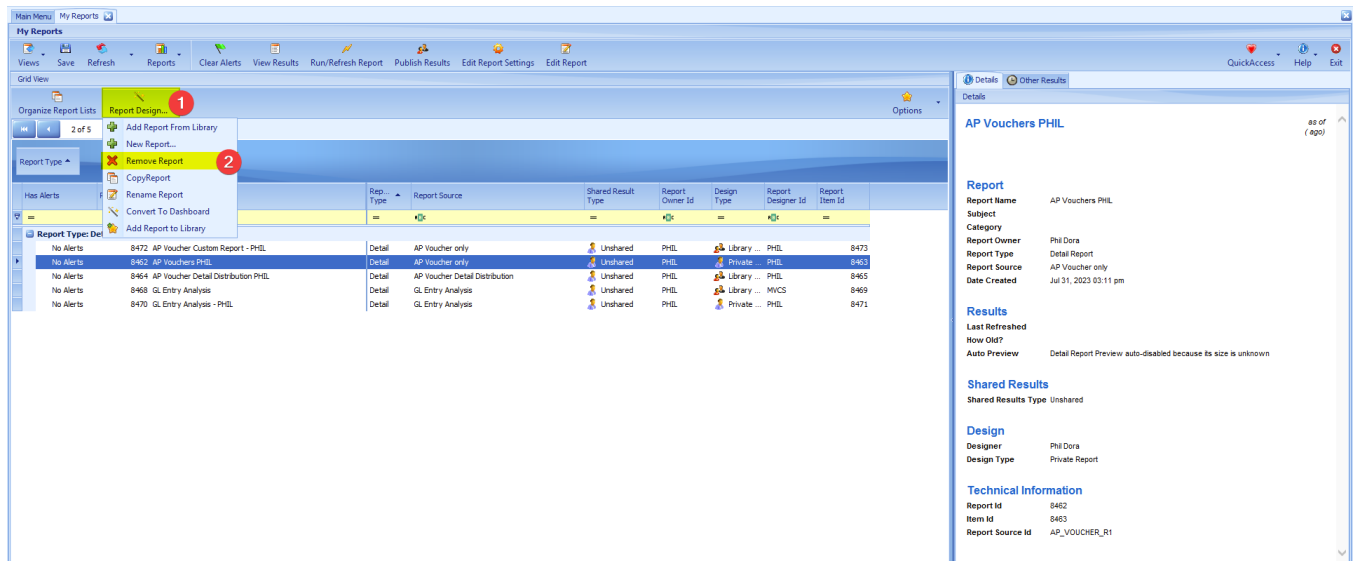
The screenshot shows the 'My Reports' interface. The main table lists reports with columns: Has Alerts, Report Id, Report Name, Rep. Type, Report Source, Shared Result Type, Report Owner Id, Design Type, Report Designer Id, and Report Item Id. Two reports are visible:

Has Alerts	Report Id	Report Name	Rep. Type	Report Source	Shared Result Type	Report Owner Id	Design Type	Report Designer Id	Report Item Id
No Alerts	9221	AP Vendor Activity - COPY	Detail	AP Vouchers and Pmts (Vendor Activity)	Unshared	PHIL	Private	PHIL	9222
No Alerts	9219	AP Vendor Activity	Detail	AP Vouchers and Pmts (Vendor Activity)	Unshared	PHIL	Library	MVCS	9220

The right-hand pane shows details for the selected report 'AP Vendor Activity', including Report Name, Subject, Category, Report Owner, Report Type, Report Source, Date Created, Params, Results, Shared Results, Design, and Technical Information.

Removing Reports

A report can be removed from the “My Reports” module. Select the report, select “Report Designer” and “Remove Report”.



The screenshot shows the 'My Reports' interface with a context menu open over the 'AP Vouchers PHIL' report. The menu options are:

- Report Design (1)
- Add Report From Library
- New Report...
- Remove Report (2)
- Copy Report
- Rename Report
- Convert To Dashboard
- Add Report to Library

The right-hand pane shows details for the selected report 'AP Vouchers PHIL', including Report Name, Subject, Category, Report Owner, Report Type, Report Source, Date Created, Results, Shared Results, Design, and Technical Information.

Adding Reports to the Library

A user can add a report to the Library to share with other users if they are the Report Designer of the report. Select the report, select “Report Designer” and “Add Report to Library”.

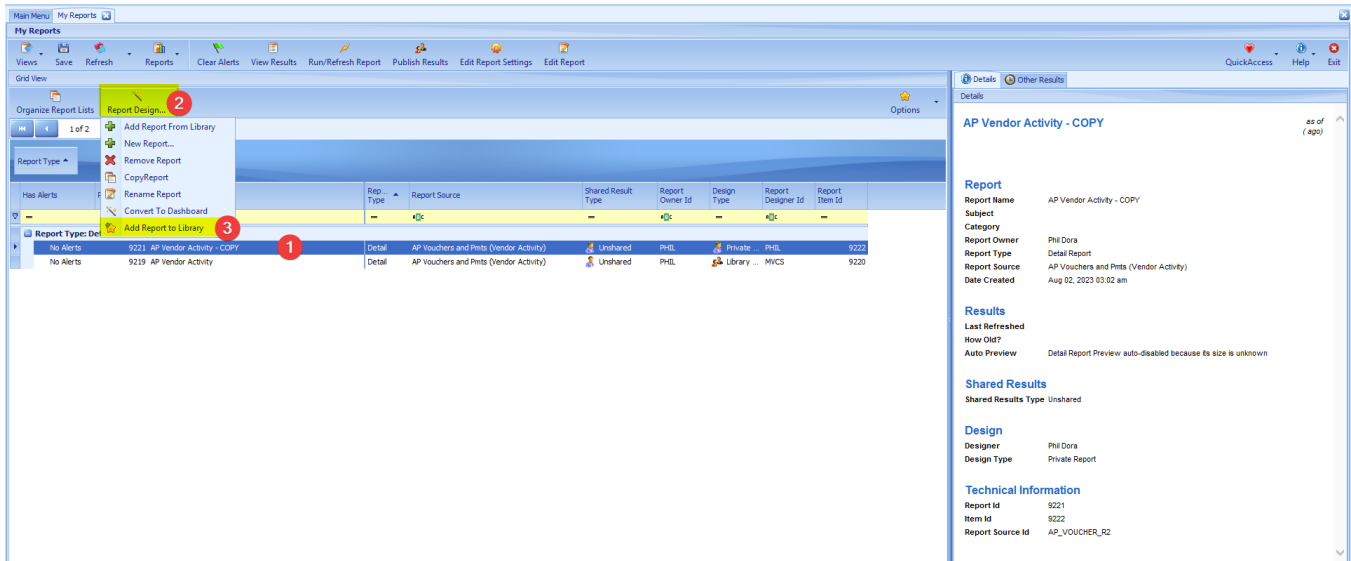
Detailed Reports - Basics

Time: 13:00 - 14:00

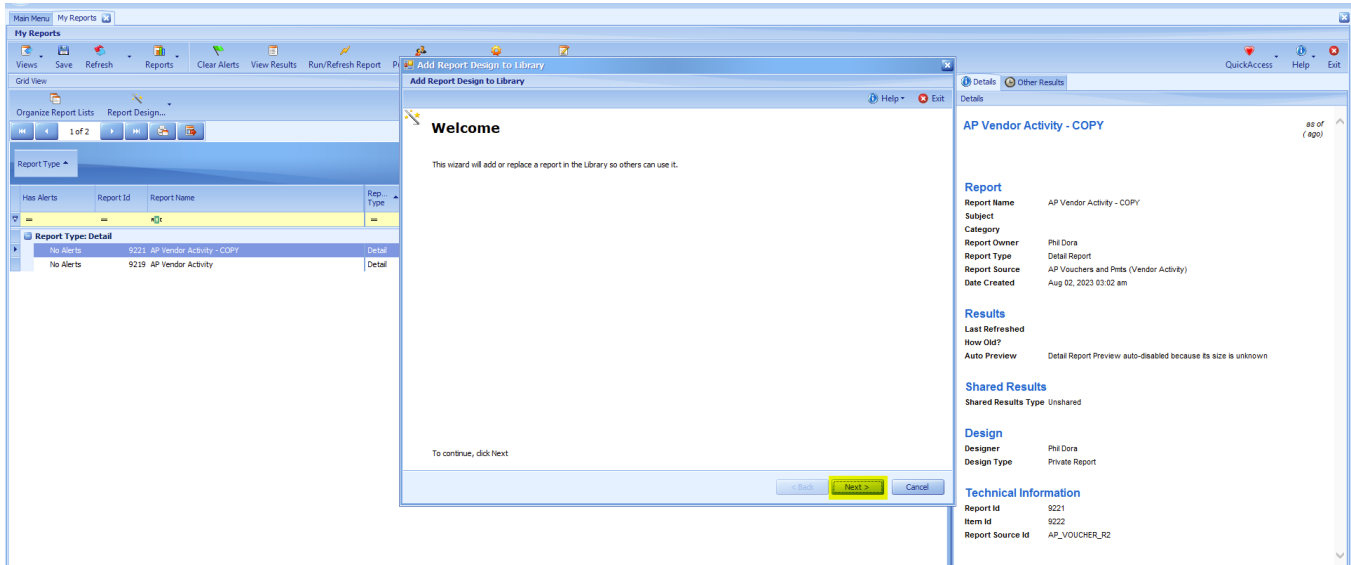
Date: Monday, October 16, 2023

Time: 10:00 - 11:00

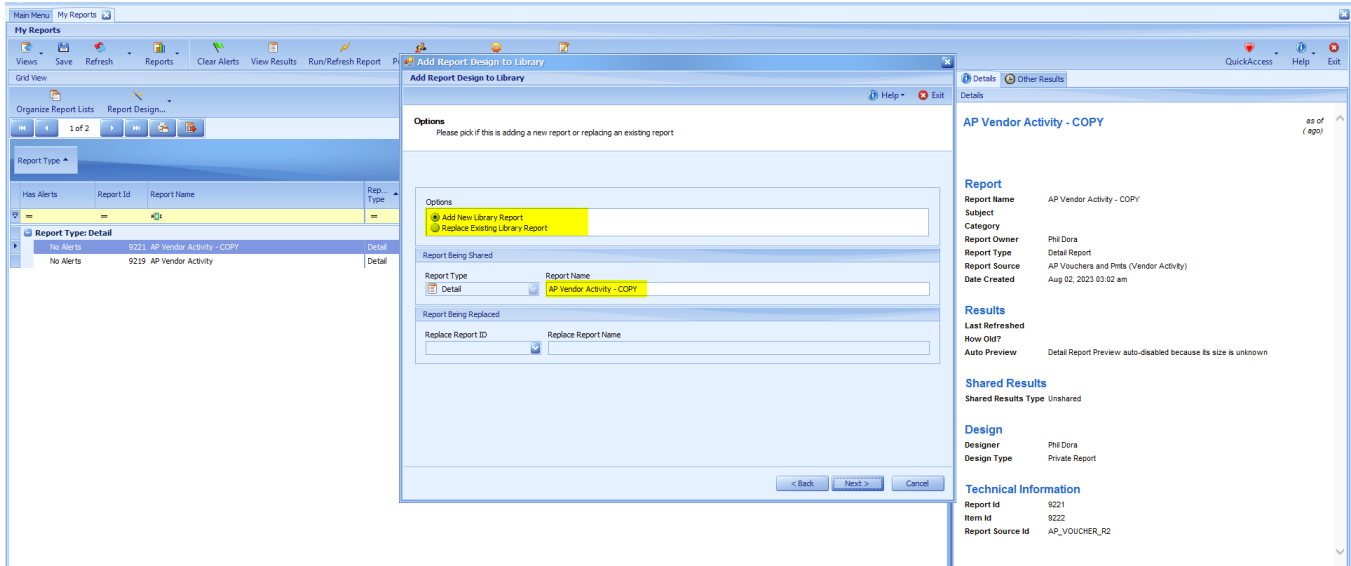
Date: Tuesday, October 17, 2023



A wizard will appear prompting you to add the report. Select “Next” to begin the process.



First, select if this is a new report or a replacement of an existing Library report. If this is the first time adding this report to the Library, Multiview will default as new. You also have the option to change the report name that will be displayed in the ViewPoint Analytics Library. Click next once ready to proceed.



Add Report Design to Library

Options
Please pick if this is adding a new report or replacing an existing report

Options
☐ Add New Library Report
☐ Replace Existing Library Report

Report Being Shared
 Report Type: Detail
 Report Name: AP Vendor Activity - COPY

Report Being Replaced
 Replace Report ID:
 Replace Report Name:

AP Vendor Activity - COPY (as of 1 ago)

Report
 Report Name: AP Vendor Activity - COPY
 Subject:
 Category:
 Report Owner: Phil Dora
 Report Type: Detail Report
 Report Source: AP Vouchers and Prints (Vendor Activity)
 Date Created: Aug 02, 2023 03:02 am

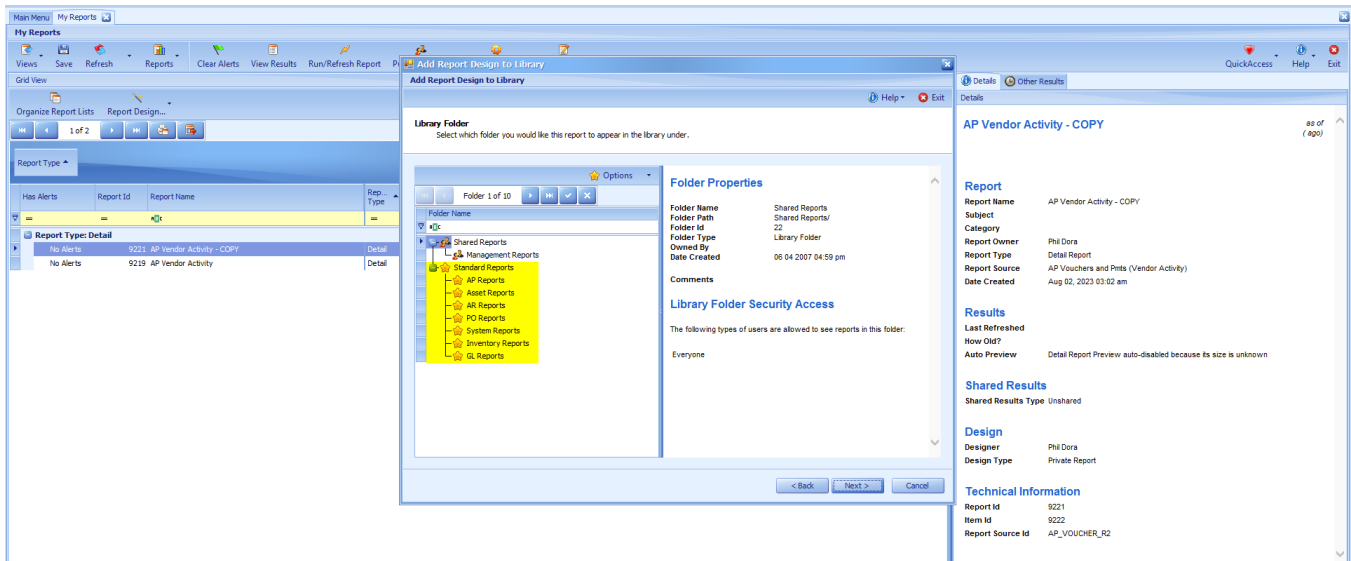
Results
 Last Refreshed:
 How Old?
 Auto Preview: Detail Report Preview auto-disabled because its size is unknown

Shared Results
 Shared Results Type: Unshared

Design
 Designer: Phil Dora
 Design Type: Private Report

Technical Information
 Report Id: 9221
 Item Id: 9222
 Report Source Id: AP_VOUCHER_R2

Next, select the folder where the report will be saved and click “Next”.



Add Report Design to Library

Library Folder
Select which folder you would like this report to appear in the library under.

Folder Name
 Folder 1 of 10
 Shared Reports
 Management Reports
 AP Reports
 Asset Reports
 AR Reports
 PO Reports
 System Reports
 Inventory Reports
 GL Reports

Folder Properties
 Folder Name: Shared Reports
 Folder Path: Shared Reports/22
 Folder Id: 22
 Folder Type: Library Folder
 Owned By: 06 04 2007 04:59 pm
 Comments:

Library Folder Security Access
 The following types of users are allowed to see reports in this folder:
 Everyone

AP Vendor Activity - COPY (as of 1 ago)

Report
 Report Name: AP Vendor Activity - COPY
 Subject:
 Category:
 Report Owner: Phil Dora
 Report Type: Detail Report
 Report Source: AP Vouchers and Prints (Vendor Activity)
 Date Created: Aug 02, 2023 03:02 am

Results
 Last Refreshed:
 How Old?
 Auto Preview: Detail Report Preview auto-disabled because its size is unknown

Shared Results
 Shared Results Type: Unshared

Design
 Designer: Phil Dora
 Design Type: Private Report

Technical Information
 Report Id: 9221
 Item Id: 9222
 Report Source Id: AP_VOUCHER_R2

Next, you have the ability to add additional security to this report to restrict who can view/access it from the Library. Select “Security to use this report” for the dropdown of options. If you choose to share this report using an option other than “Everyone”, ensure that your User ID/Role ID is selected so that you can also view the data.

You can select “Mandatory Report” which will force the report onto the “My Reports” module for all users with security access. This option can only be selected if the security is set to any option other than “Everyone”. Once security has been chosen, click “Next” to continue.

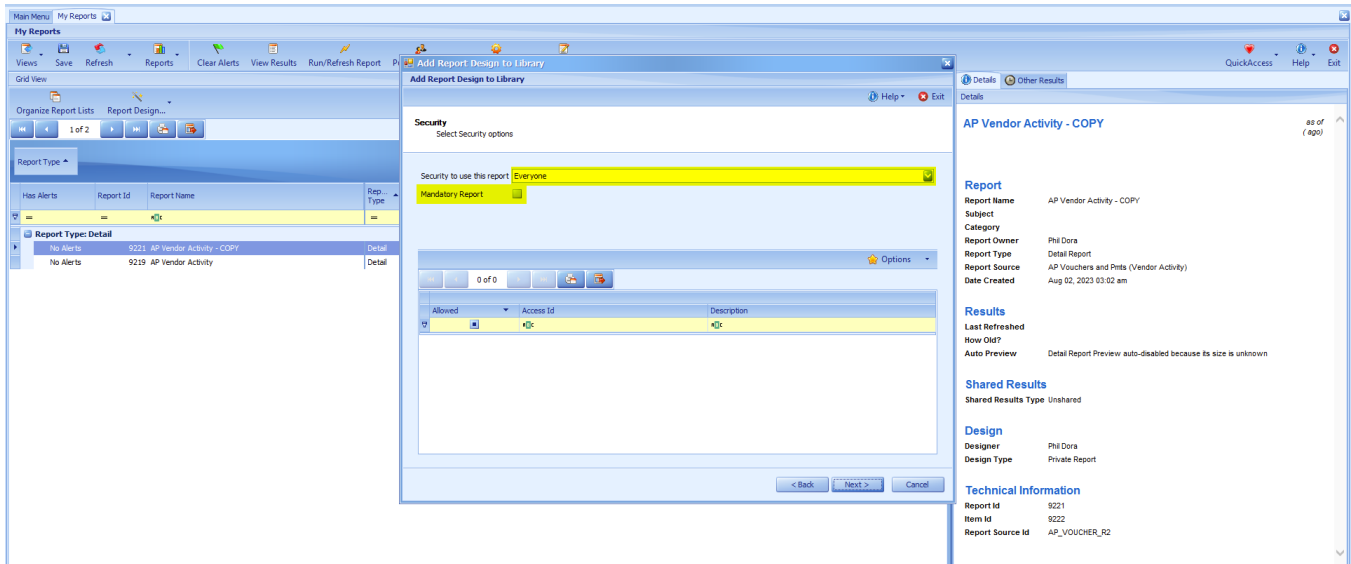
Detailed Reports - Basics

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Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



Add Report Design to Library

Security
Select Security options

Security to use this report: **Everyone**

☒ Mandatory Report

Allowed

Access Id	Description

Options

Details

AP Vendor Activity - COPY

Report

Report Name: AP Vendor Activity - COPY
Subject:
Category:
Report Owner: Phil Dora
Report Type: Detail Report
Report Source: AP Vouchers and Pmts (Vendor Activity)
Date Created: Aug 02, 2023 03:02 am

Results

Last Refreshed:
How Old?:
Auto Preview: Detail Report Preview auto-disabled because its size is unknown

Shared Results

Shared Results Type: Unshared

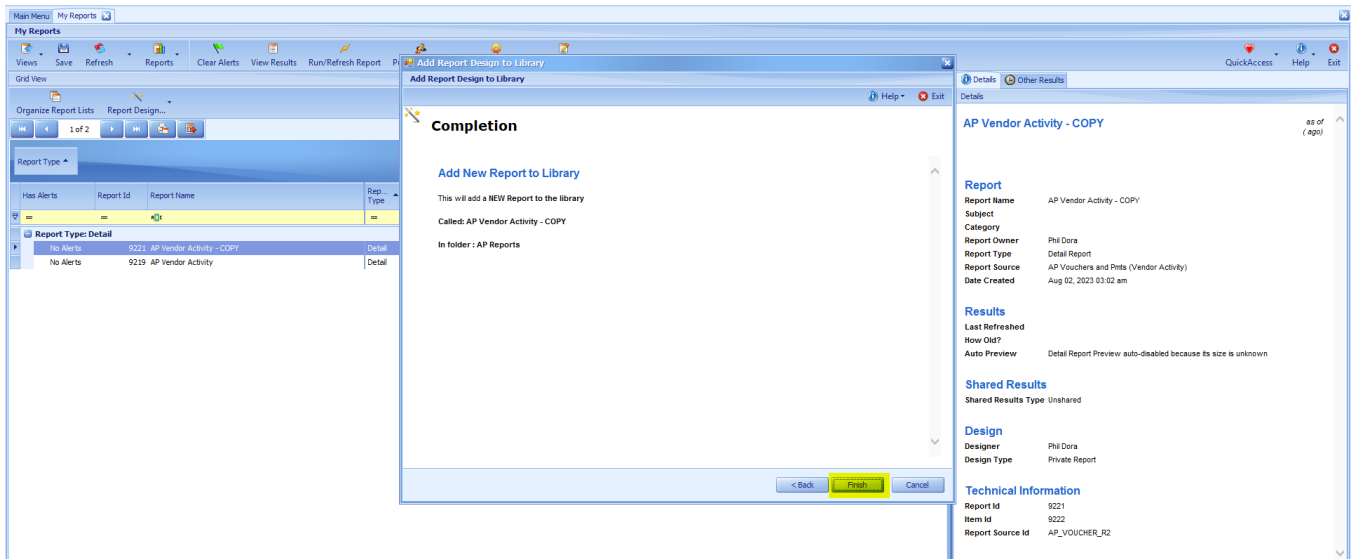
Design

Designer: Phil Dora
Design Type: Private Report

Technical Information

Report Id: 9221
Item Id: 9222
Report Source Id: AP_VOUCHER_R2

Lastly, click “Finish” and the report will be added to the Library.



Add Report Design to Library

Completion

Add New Report to Library

This will add a NEW Report to the library

Called: AP Vendor Activity - COPY

In folder: AP Reports

Details

AP Vendor Activity - COPY

Report

Report Name: AP Vendor Activity - COPY
Subject:
Category:
Report Owner: Phil Dora
Report Type: Detail Report
Report Source: AP Vouchers and Pmts (Vendor Activity)
Date Created: Aug 02, 2023 03:02 am

Results

Last Refreshed:
How Old?:
Auto Preview: Detail Report Preview auto-disabled because its size is unknown

Shared Results

Shared Results Type: Unshared

Design

Designer: Phil Dora
Design Type: Private Report

Technical Information

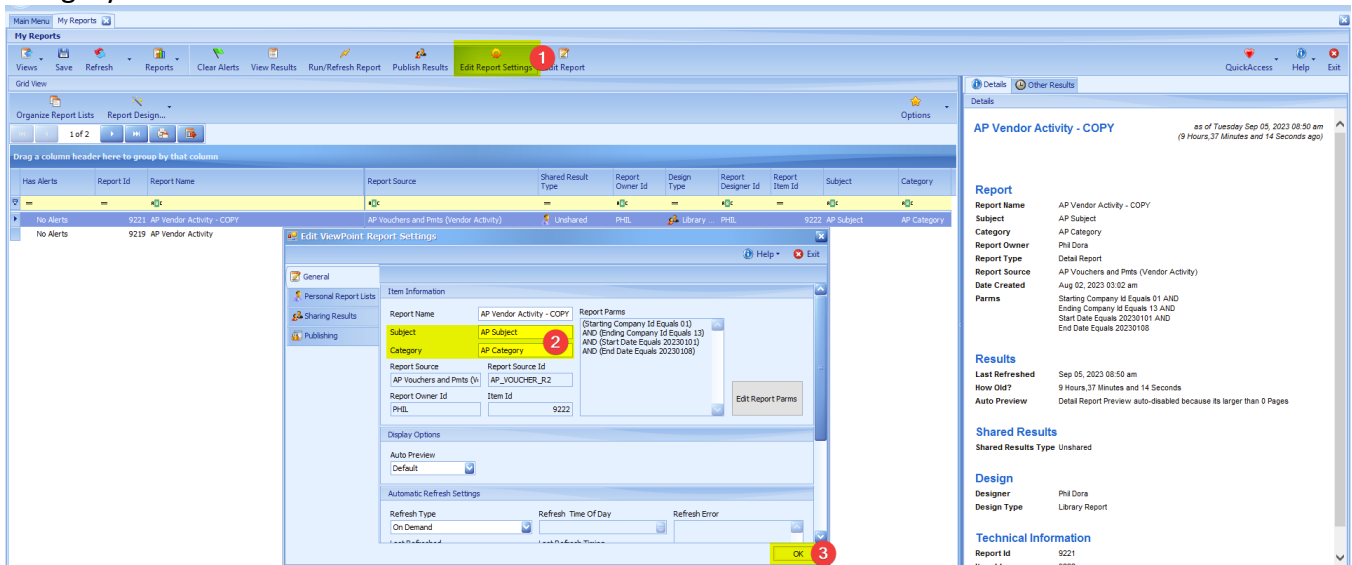
Report Id: 9221
Item Id: 9222
Report Source Id: AP_VOUCHER_R2

Organizing Reports

Add a Category and Subject

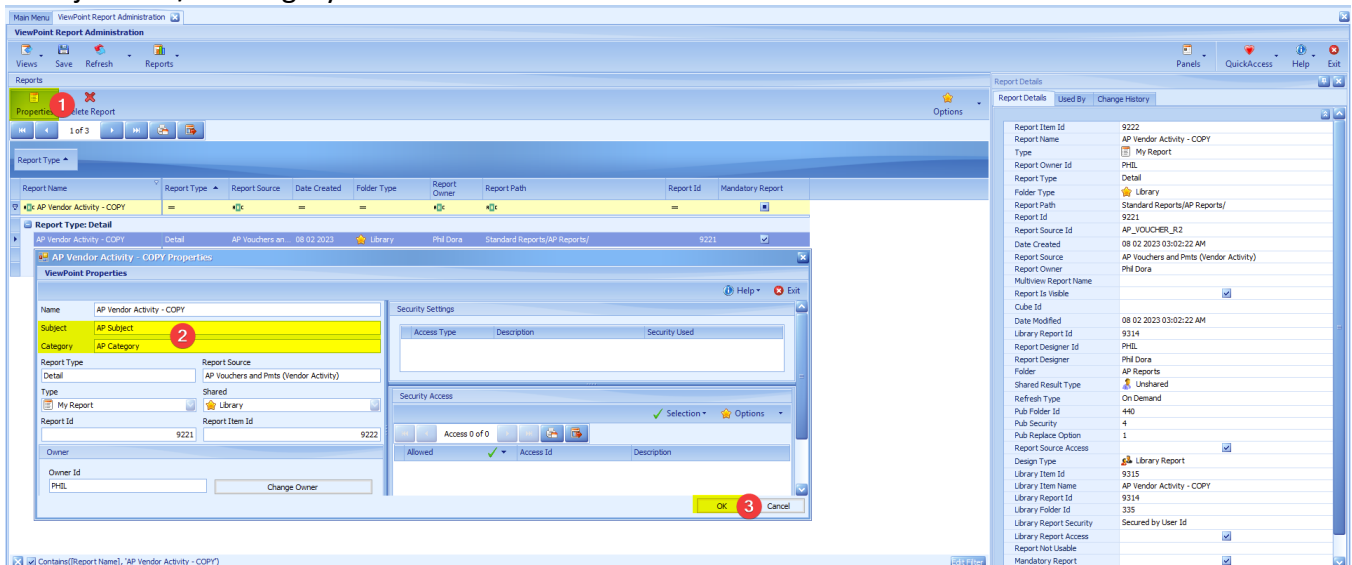
Folders can be used to organize reports. In “My Reports”, you can add a subject and a category to any report. There are multiple ways to add a subject and/or category on a report. Below are two examples, but similar options exist in other modules when looking at a report’s properties or a report’s settings.

- Select a specific report in “My Reports” and select “Edit Report Settings” to add a subject and/or category.



The screenshot shows the 'My Reports' window with a table of reports. The report 'AP Vendor Activity - COPY' is selected. The 'Edit Report Settings' dialog box is open, showing the 'General' tab. The 'Subject' field is highlighted with a red circle and the number 2. The 'Category' field is highlighted with a red circle and the number 3. The 'Report Name' is 'AP Vendor Activity - COPY'. The 'Report Source' is 'AP Vouchers and Prints (Vendor Activity)'. The 'Report Owner' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Design Type' is 'Library'. The 'Report Designer Id' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Category' is 'AP Category'. The 'Report Subject' is 'AP Subject'. The 'Report Source' is 'AP Vouchers and Prints (Vendor Activity)'. The 'Report Owner' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Design Type' is 'Library'. The 'Report Designer Id' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Category' is 'AP Category'. The 'Report Subject' is 'AP Subject'.

- Select one or more reports in “ViewPoint Report Administration” and select “Properties” to add a subject and/or category.

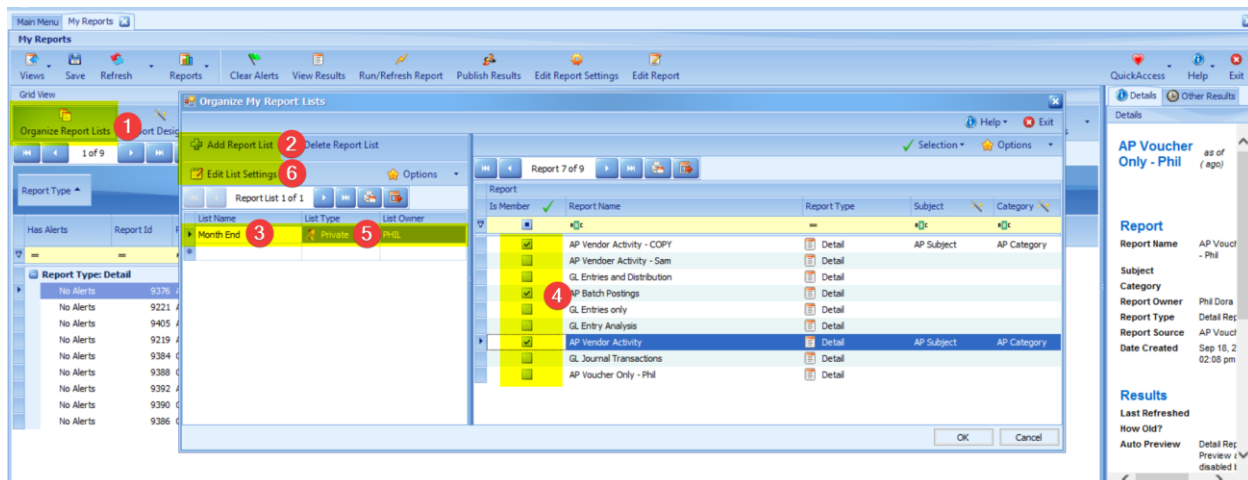


The screenshot shows the 'ViewPoint Report Administration' window with a table of reports. The report 'AP Vendor Activity - COPY' is selected. The 'Properties' dialog box is open, showing the 'ViewPoint Properties' tab. The 'Subject' field is highlighted with a red circle and the number 2. The 'Category' field is highlighted with a red circle and the number 3. The 'Report Name' is 'AP Vendor Activity - COPY'. The 'Report Source' is 'AP Vouchers and Prints (Vendor Activity)'. The 'Report Owner' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Design Type' is 'Library'. The 'Report Designer Id' is 'PHL'. The 'Report Item Id' is '9222'. The 'Report Category' is 'AP Category'. The 'Report Subject' is 'AP Subject'.

Report Lists

Report lists can be created as private or shared. A Private List groups together your own reports to organize them, or to be able to calculate them all at once using the Refresh Report List feature. A Shared List groups together reports and shares them out to other users. These users will not be able to run/refresh the report on demand. They will only see the most recent results as when the group owner last refreshed the report list. By adding a report to a Shared Report List, included users will have access to the report on their “My Reports” module with a Shared Result Type of “Shared To Me”.

Report Lists are created in Multiview > ViewPoint BI > My Reports. Select “Organize Report Lists” (Step 1). Select “Add Report List” to create a new list and give a name (Step 2). Once named (Step 3), you can select reports to be included in the list (Step 4). Afterwards, you can make the report either private or shared (Step 5). If the report list is shared, select “Edit List Settings” to choose how the report is shared and who will have access (Step 6).

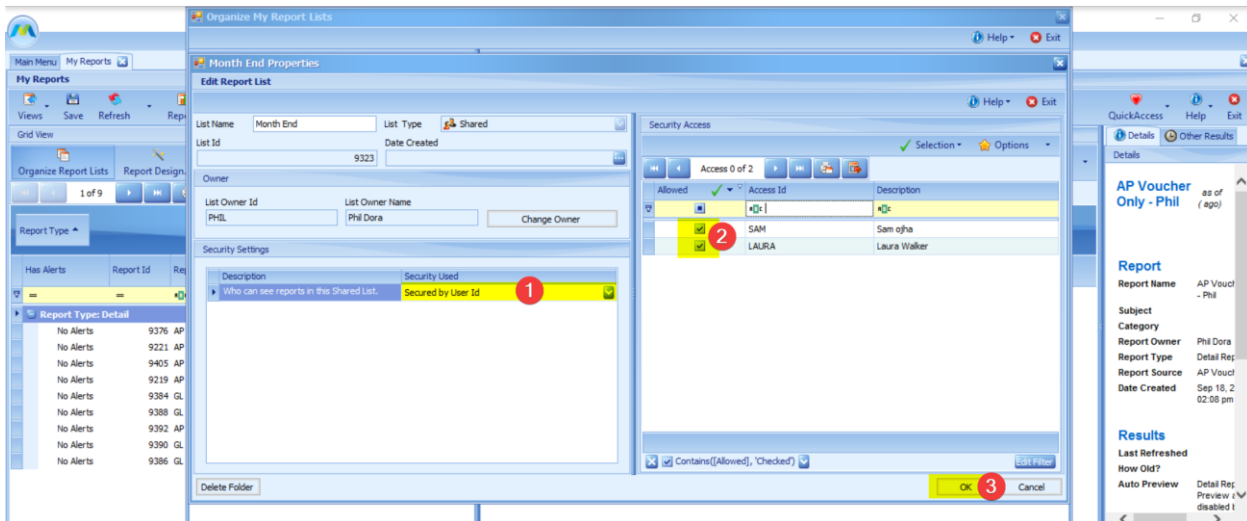


After select “Edit List Settings”, select the security used and who has access.

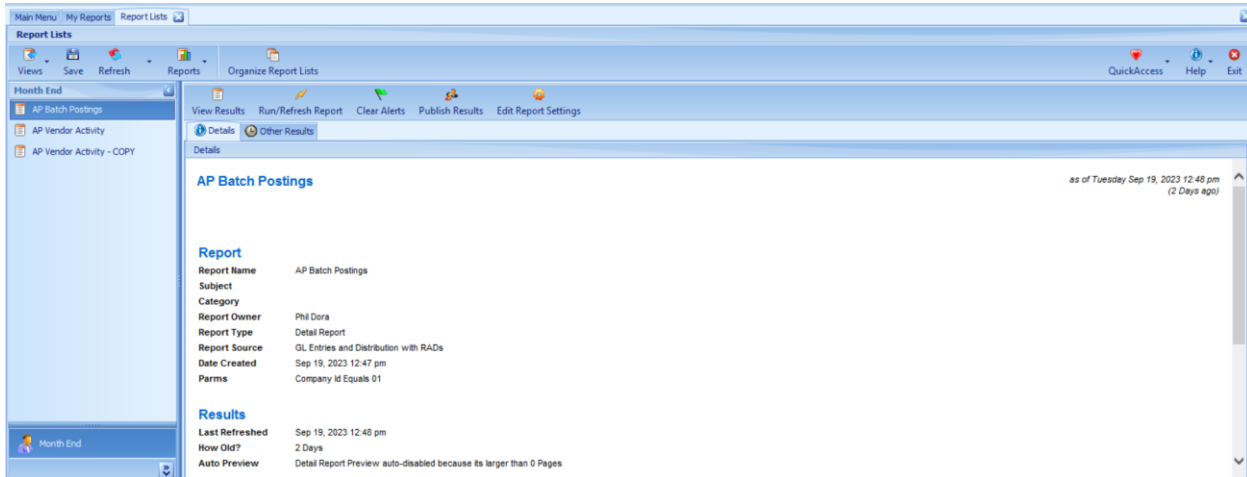
Detailed Reports - Basics

Time: 13:00 - 14:00 Date: Monday, October 16, 2023

Time: 10:00 - 11:00 Date: Tuesday, October 17, 2023



Report Lists can be viewed in Multiview > ViewPoint BI > My Report Lists shown below.



Entire Report Lists can be refreshed in Multiview > ViewPoint BI > Refresh Report Lists. Select the Report List and the date that you would like the reports refreshed. Once set, select "OK" to see the results. Please note that this will only work with Analytic reports.

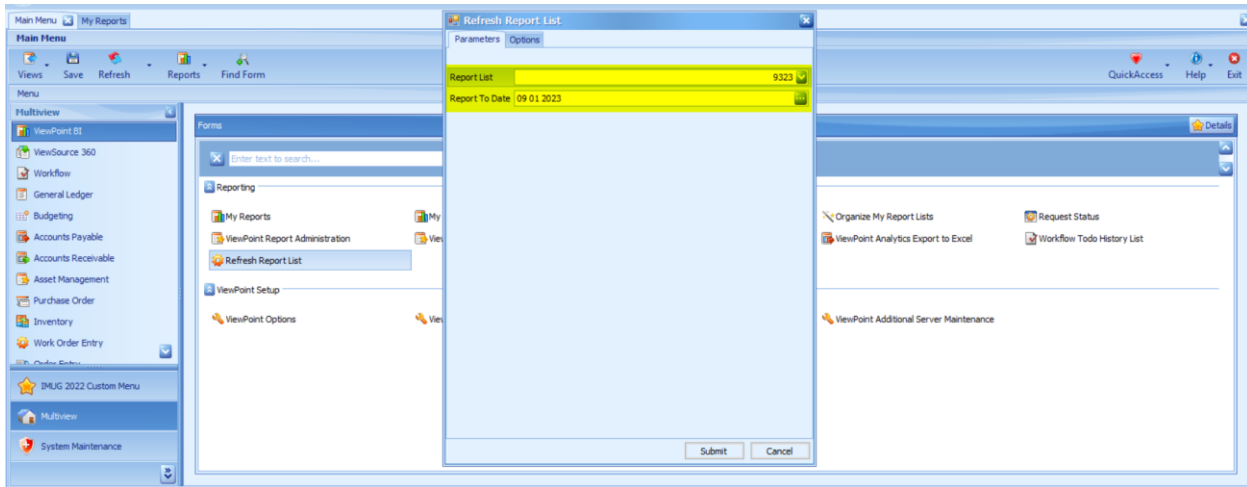
Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

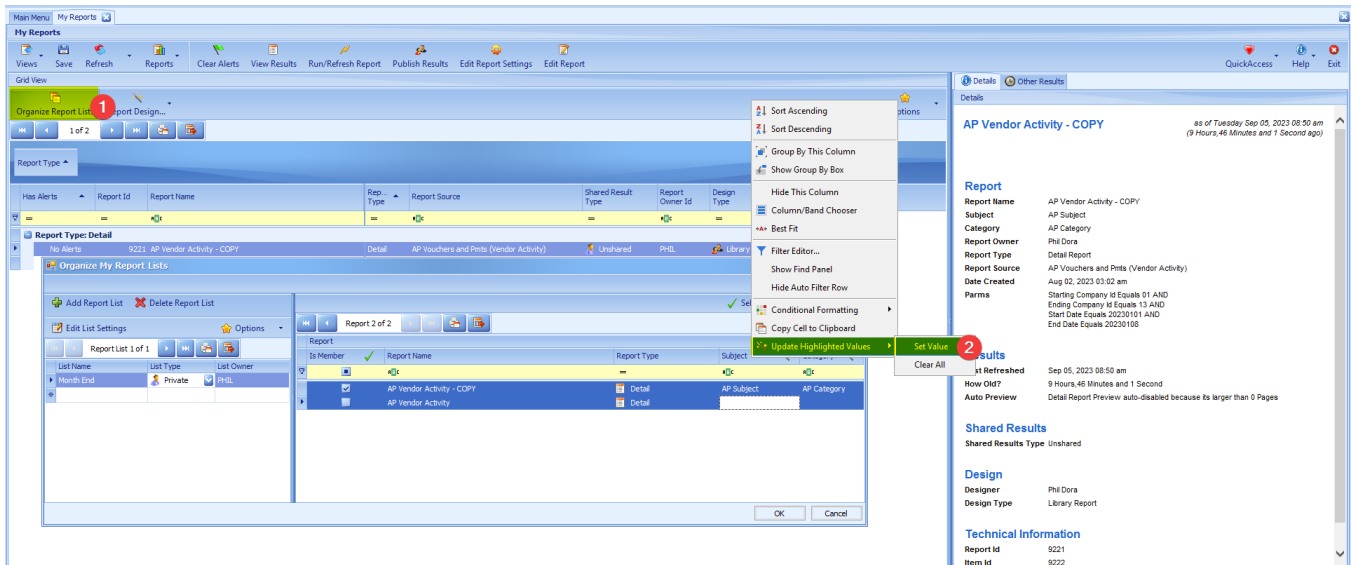
Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



Using Subject & Category with Report Lists

Subjects and/or categories can be used with Report Lists. To mass add a subject and/or category, select “Organize Report Lists” in the “My Reports” module. Use the grid of your reports to select multiple reports by using the Ctrl and Shift button and clicking on the reports you wish to use. Right click on the Subject or Category column heading and select “Updated Highlighted Values” and select “Set Value”. Enter the new value and press OK to save changes.



All chosen reports will now display with the new Subject and/or Category.

Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023

Main Menu | My Reports

My Reports

Views Save Refresh Reports Clear Alerts View Results Run/Refresh Report Publish Results Edit Report Settings Edit Report

Grid View

Organize Report Lists Report Design... Options

1 of 2

Drag a column header here to group by that column

Has Alerts	Report Id	Report Name	Report Source	Shared Result Type	Report Owner Id	Design Type	Report Designer Id	Report Item Id	Subject	Category
No Alerts	9221	AP Vendor Activity - COPY	AP Vouchers and Prints (Vendor Activity)	Unshared	PHL	Library	PHL	9222	AP Subject	AP Category
No Alerts	9219	AP Vendor Activity	AP Vouchers and Prints (Vendor Activity)	Unshared	PHL	Library	MVCS	9220	AP Subject	AP Category

Details **Other Results**

AP Vendor Activity - COPY

88 of Tuesday Sep 05, 2023 08:50 am
(10 Hours, 4 Minutes and 16 Seconds ago)

Report

Report Name: AP Vendor Activity - COPY
Subject: AP Subject
Category: AP Category
Report Owner: Phil Dora
Report Type: Detail Report
Report Source: AP Vouchers and Prints (Vendor Activity)
Date Created: Aug 05, 2023 10:02 am
Params: Starting Company Id Equals 01 AND
Ending Company Id Equals 13 AND
Start Date Equals 20220101 AND
End Date Equals 20220105

Results

Last Refreshed: Sep 05, 2023 08:50 am
How Old?: 10 Hours, 4 Minutes and 16 Seconds
Auto Preview: Detail Report Preview auto-disabled because its larger than 0 Pages

Shared Results

Shared Results Type: Unshared

Design

Designer: Phil Dora
Design Type: Library Report

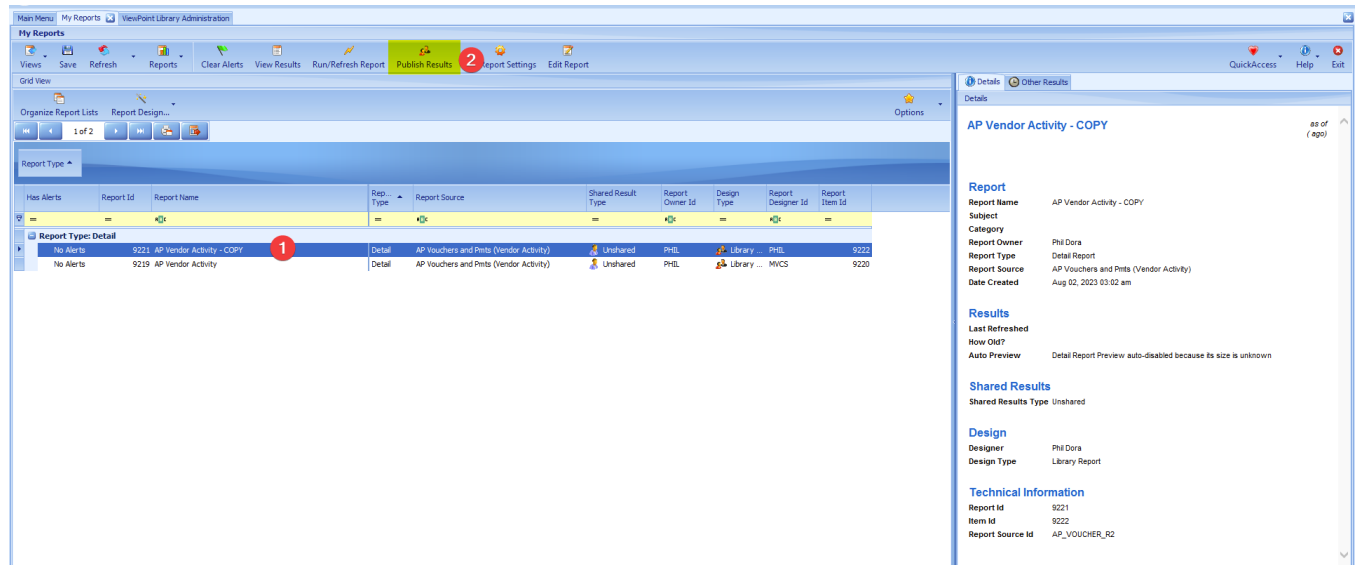
Technical Information

Report Id: 9221
Item Id: 9222

Publishing Reports

Publishing Report Results

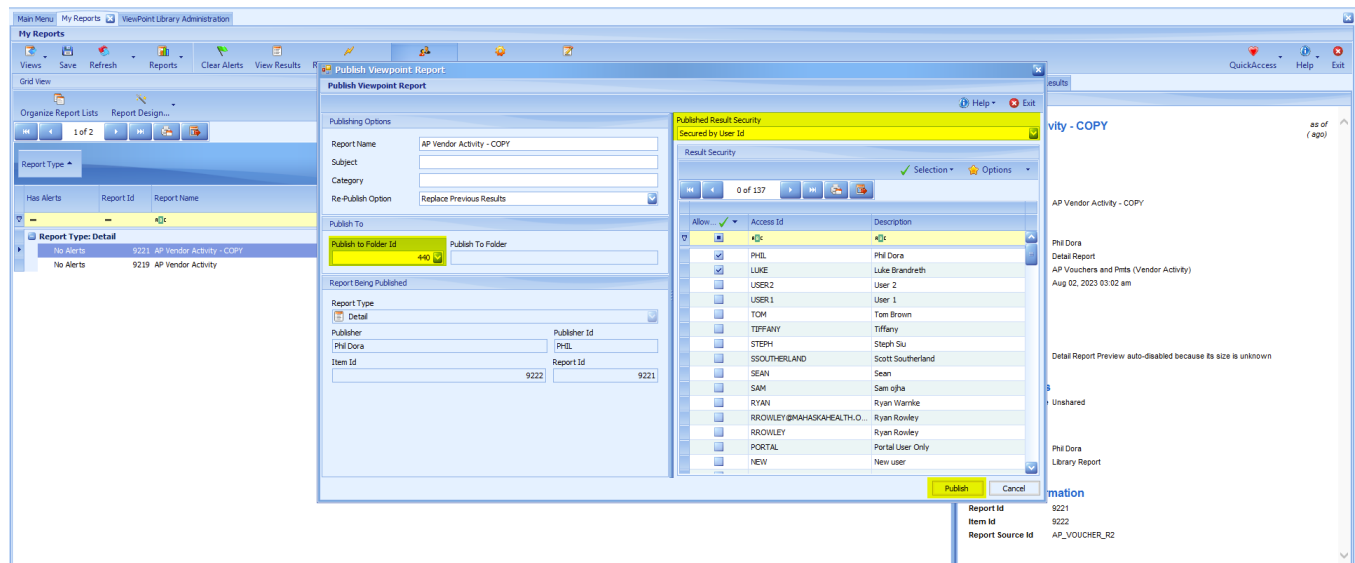
Publishing report results will allow users to view report results without making any changes. Navigate to Multiview > ViewPoint BI > My Reports and select the report. Next, select “Publish Results” which will open a new window.



Has Alerts	Report Id	Report Name	Rep. Type	Report Source	Shared Result Type	Report Owner Id	Design Type	Report Designer Id	Report Item Id
No Alerts	9221	AP Vendor Activity - COPY	Detail	AP Vouchers and Pmts (Vendor Activity)	Unshared	PHIL	Library	PHIL	9222
No Alerts	9219	AP Vendor Activity	Detail	AP Vouchers and Pmts (Vendor Activity)	Unshared	PHIL	Library	MVCS	9220

Report
Report Name AP Vendor Activity - COPY
Subject
Category
Report Owner Phil Dora
Report Type Detail Report
Report Source AP Vouchers and Pmts (Vendor Activity)
Date Created Aug 02, 2023 03:02 am
Results
Last Refreshed
How Old?
Auto Preview Detail Report Preview auto-disabled because its size is unknown
Shared Results
Shared Results Type Unshared
Design
Designer Phil Dora
Design Type Library Report
Technical Information
Report Id 9221
Item Id 9222
Report Source Id AP_VOUCHER_R2

Select the security you would like added to the Published Results and select the Folder ID to select the location. Once set, click “Publish”.



Publishing Options
Report Name AP Vendor Activity - COPY
Subject
Category
Re-Publish Option Replace Previous Results

Publish To
Publish to Folder Id **Publish To Folder**

Report Being Published
Report Type Detail
Publisher Phil Dora
Publisher Id
Item Id 9222
Report Id 9221

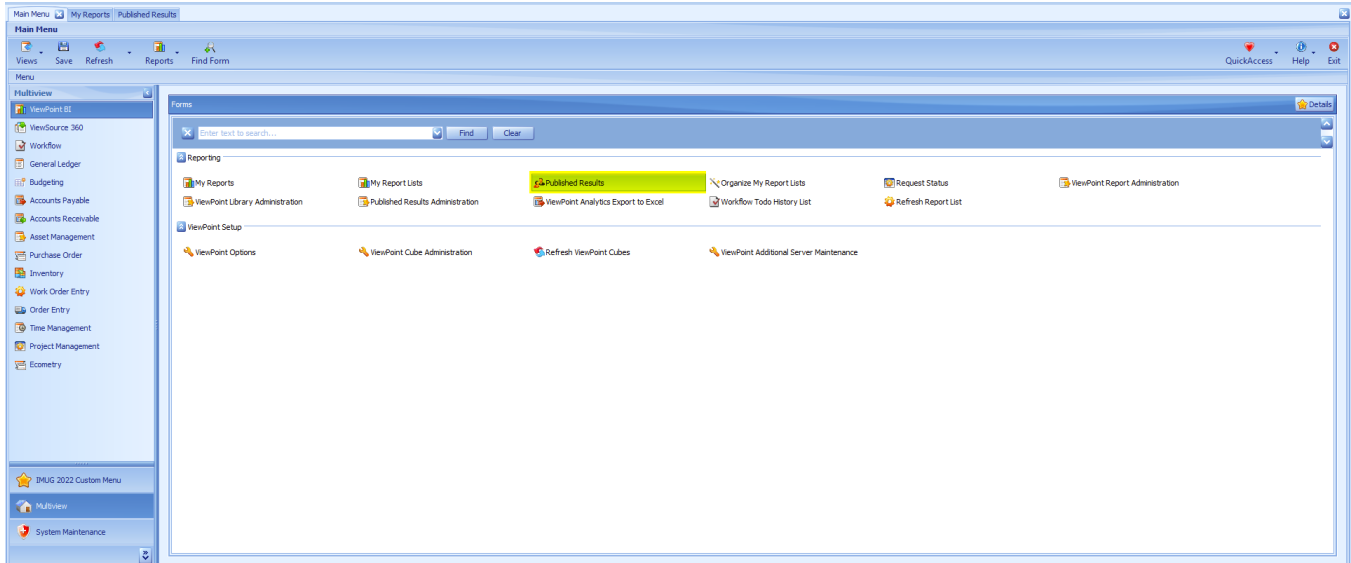
Published Result Security
Secured by User Id
Result Security

Allow	Access Id	Description
<input checked="" type="checkbox"/>	PHIL	Phil Dora
<input checked="" type="checkbox"/>	LUKE	Luke Brandreth
<input checked="" type="checkbox"/>	USER2	User 2
<input checked="" type="checkbox"/>	USER1	User 1
<input checked="" type="checkbox"/>	TOM	Tom Brown
<input checked="" type="checkbox"/>	TIFFANY	Tiffany
<input checked="" type="checkbox"/>	STEPH	Steph Su
<input checked="" type="checkbox"/>	SSOUTHERLAND	Scott Southerland
<input checked="" type="checkbox"/>	SEAN	Sean
<input checked="" type="checkbox"/>	SAM	Sam gha
<input checked="" type="checkbox"/>	RYAN	Ryan Wankle
<input checked="" type="checkbox"/>	BROWLEY@MAHASKIAHEALTH.O...	Ryan Rowley
<input checked="" type="checkbox"/>	BROWLEY	Ryan Rowley
<input checked="" type="checkbox"/>	PORTAL	Portal User Only
<input checked="" type="checkbox"/>	NEW	New user

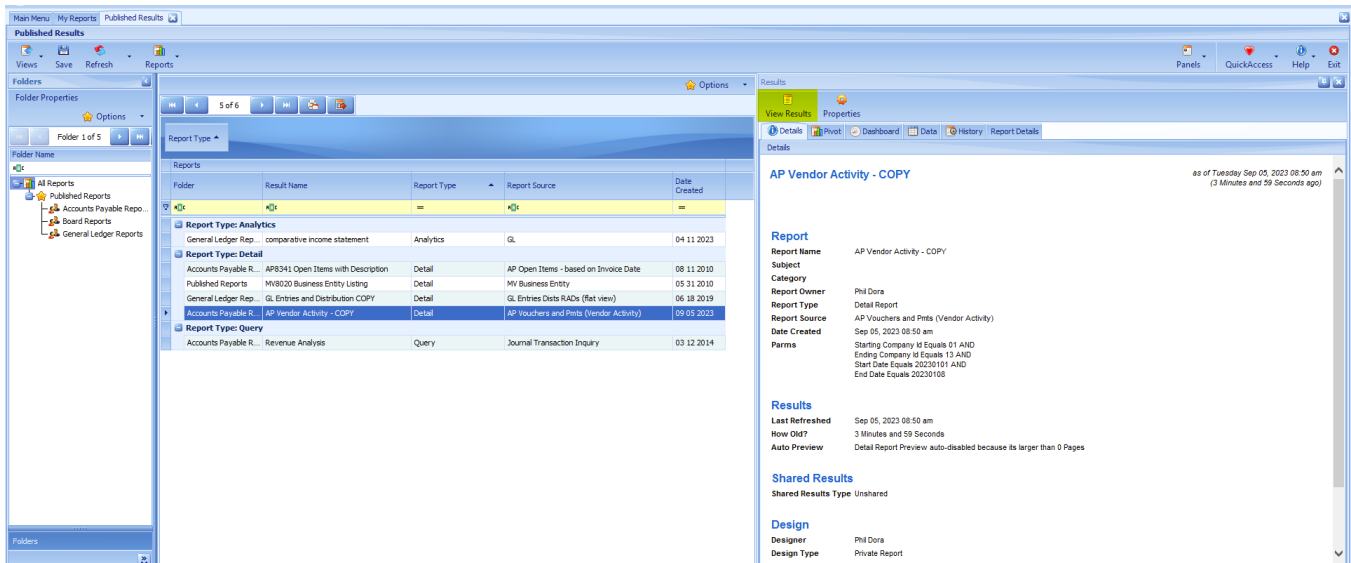
Publish **Cancel**

Published Results

Published report results can be viewed in Multiview > ViewPoint BI > Published Results.



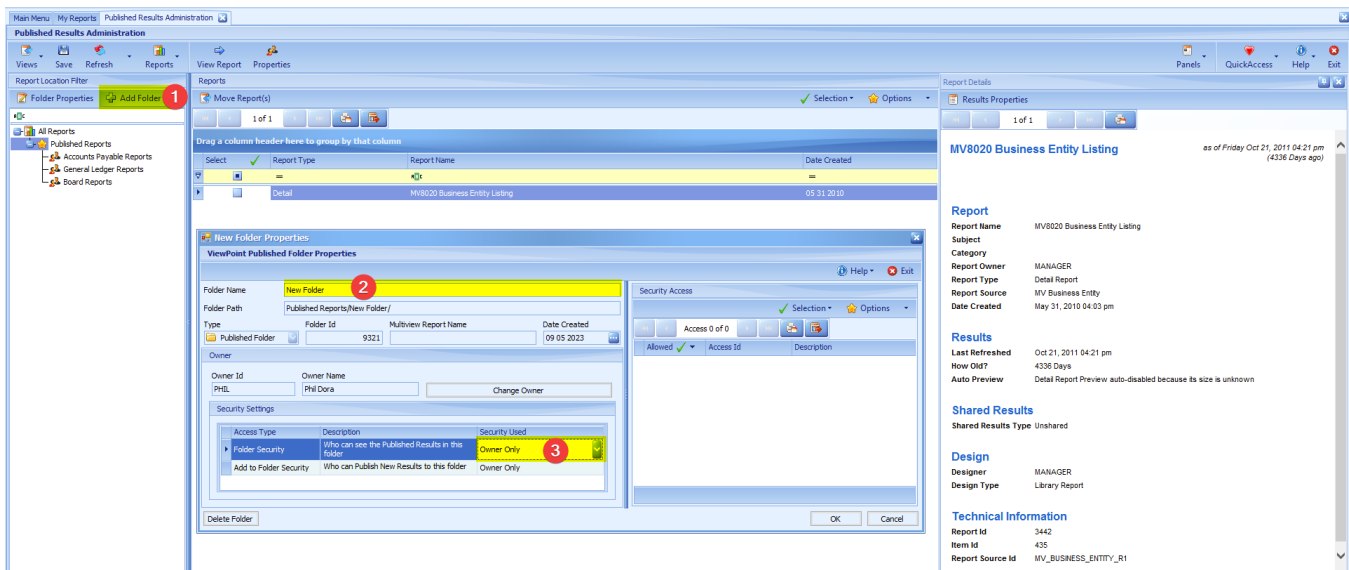
Select the report and select “View Results” to see the published results.



Administration Screens

Published Results Administration

All published reports can be seen in Multiview > ViewPoint BI > Published Results Administration. The report will show the last report ran that was published. Users will not have the ability to run their own queries in a published report. This screen will show the reports by folders. You can use this screen to add folders and move reports between folders. To add a folder, select “Add Folder” and add a folder name and assign security as necessary.



You can edit the Published Report properties by selecting “Properties”. A window will appear allowing you to edit the report security, name, report owner and other information.

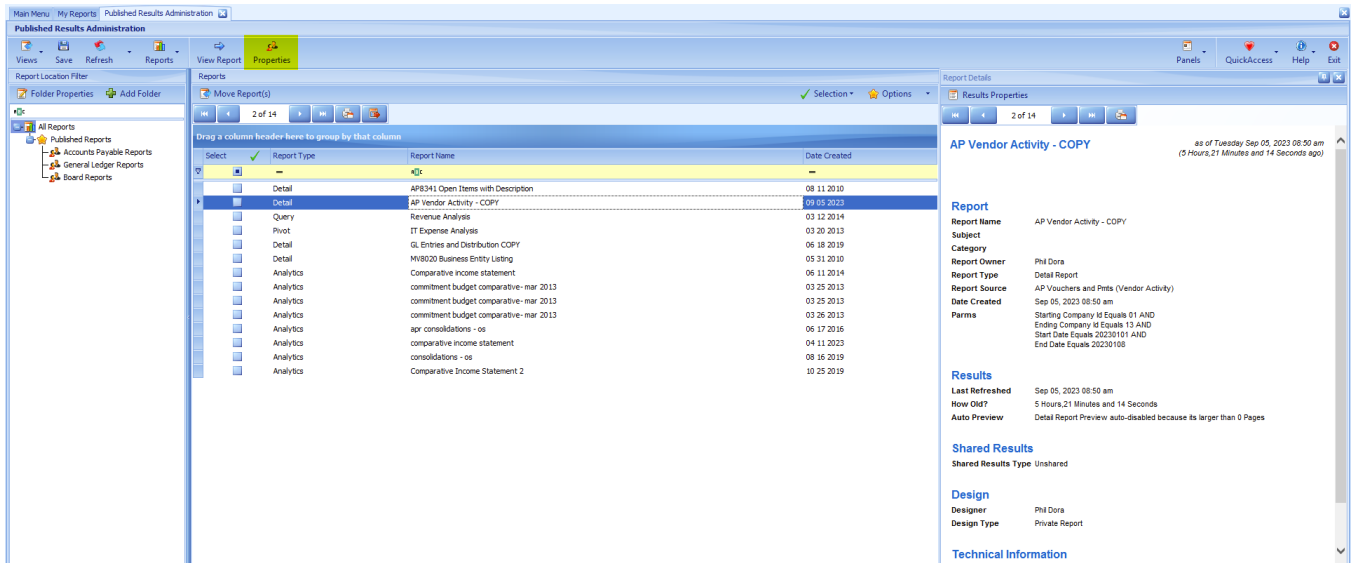
Detailed Reports - Basics

Time: 13:00 - 14:00

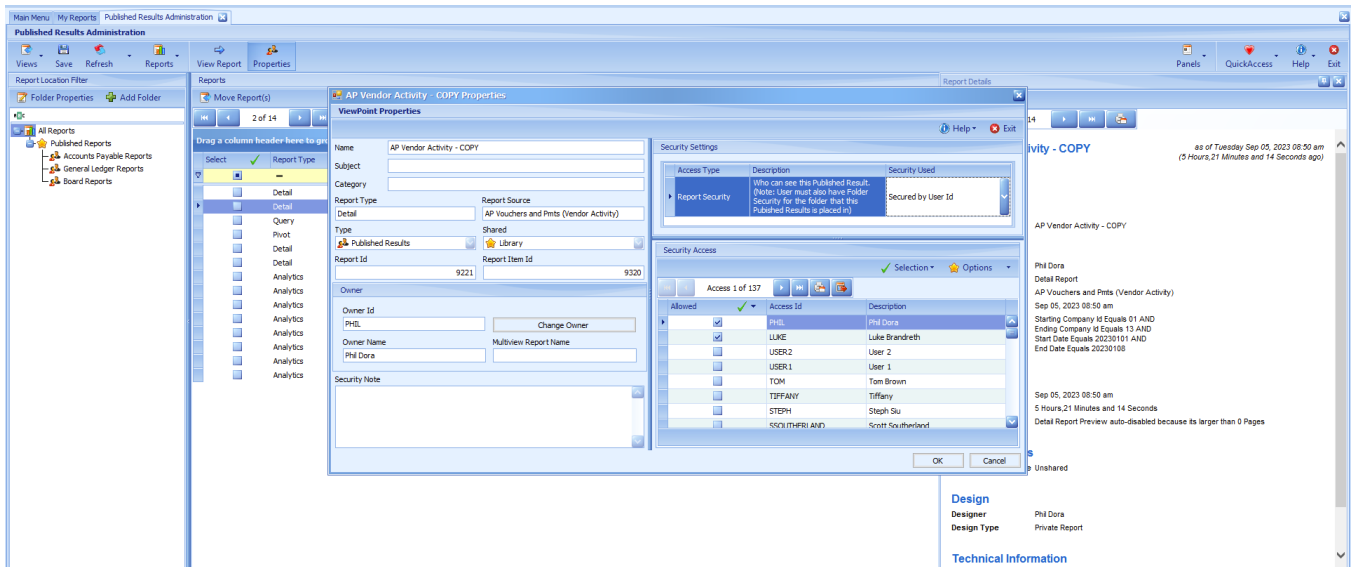
Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



The screenshot shows the 'Published Results Administration' window. The left sidebar contains a tree view with 'All Reports' expanded, showing 'Published Reports' and 'Accounts Payable Reports'. The main area displays a list of reports with columns for 'Select', 'Report Type', 'Report Name', and 'Date Created'. The 'AP Vendor Activity - COPY' report is selected. The right pane shows the 'Report Details' for this report, including 'Report Name', 'Subject', 'Category', 'Report Owner', 'Report Type', 'Report Source', 'Date Created', 'Params', 'Results', 'Shared Results', 'Design', and 'Technical Information'.



The screenshot shows the 'AP Vendor Activity - COPY Properties' dialog box. The 'ViewPoint Properties' tab is active, showing fields for 'Name', 'Subject', 'Category', 'Report Type', 'Report Source', 'Type', 'Published Results', 'Report Id', 'Report Item Id', 'Owner', 'Owner Id', 'Owner Name', 'Multiview Report Name', and 'Security Note'. The 'Security Settings' tab is also visible, showing 'Access Type', 'Description', 'Security Used', and 'Security Access'.

To view the report, select “View Report” and it will show you the last report ran.

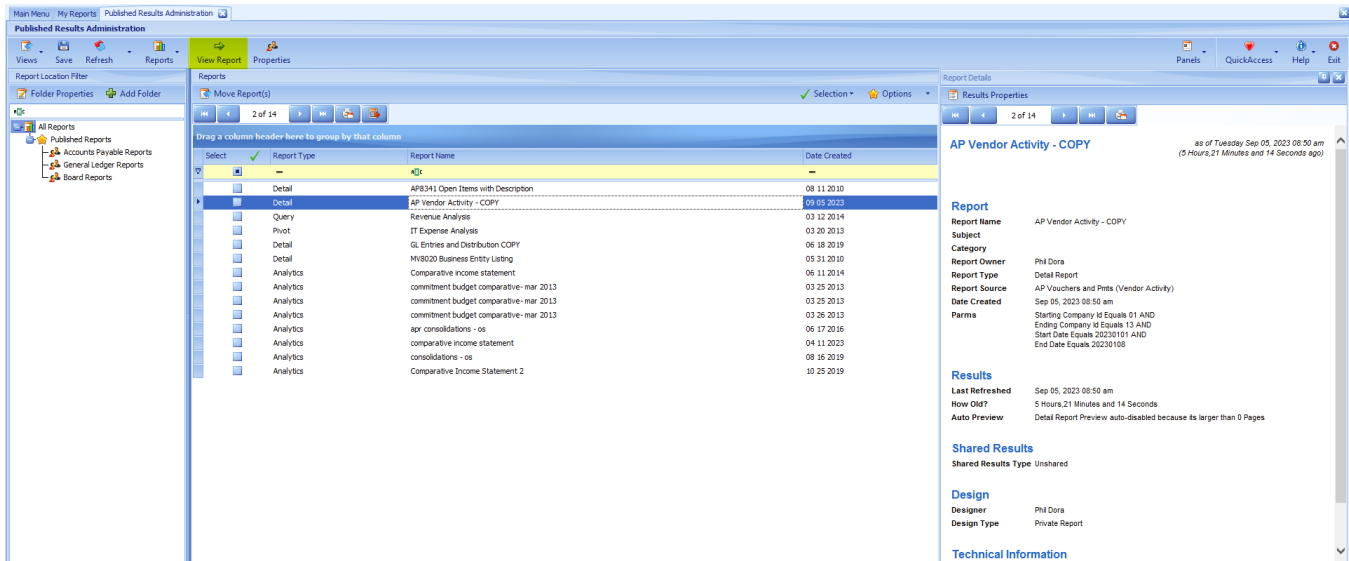
Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023

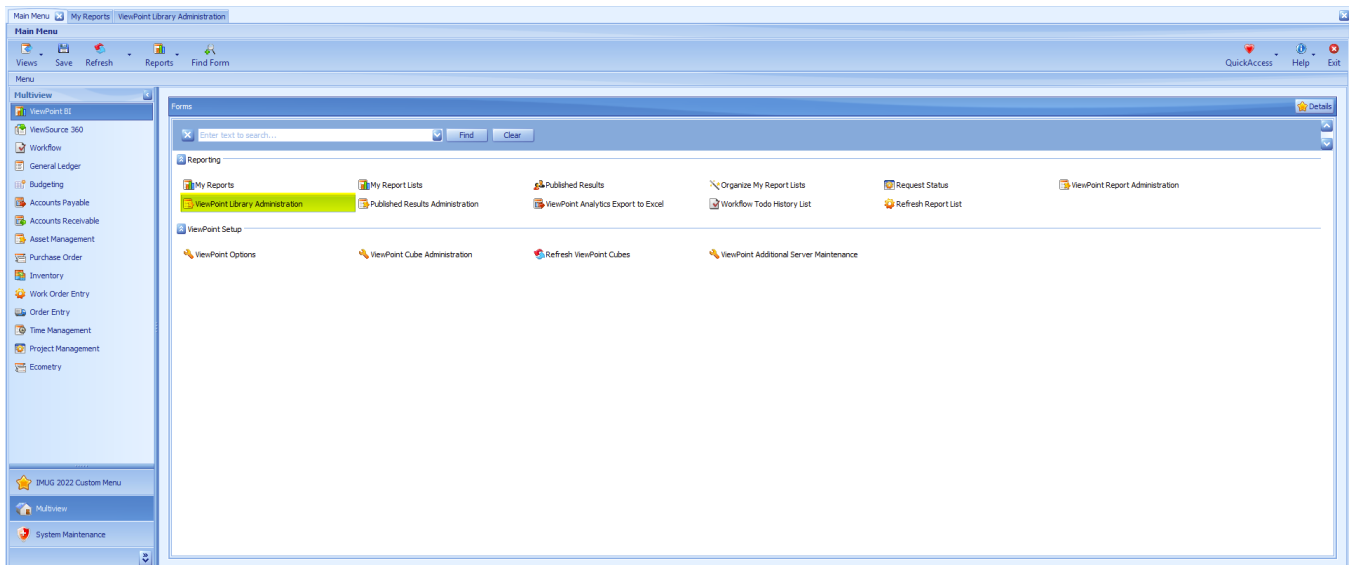


The screenshot shows the 'Published Results Administration' window. On the left, there's a 'Report Location Filter' with a tree view showing 'All Reports', 'Published Reports', 'Accounts Payable Reports', 'General Ledger Reports', and 'Board Reports'. The main area displays a table of reports with columns for 'Select', 'Report Type', 'Report Name', and 'Date Created'. The 'AP Vendor Activity - COPY' report is selected. On the right, the 'Report Details' panel shows information for 'AP Vendor Activity - COPY', including 'Report Name', 'Subject', 'Category', 'Report Owner', 'Report Type', 'Report Source', 'Date Created', 'Params', 'Results', 'Shared Results', 'Design', and 'Technical Information'.

Select	Report Type	Report Name	Date Created
<input type="checkbox"/>	Detail	AP8341 Open Items with Description	08 11 2010
<input checked="" type="checkbox"/>	Query	AP Vendor Activity - COPY	09 13 2023
<input type="checkbox"/>	Pivot	Revenue Analysis	03 12 2014
<input type="checkbox"/>	Detail	IT Expense Analysis	03 20 2013
<input type="checkbox"/>	Detail	GL Entries and Distribution COPY	06 18 2019
<input type="checkbox"/>	Detail	MVB020 Business Entity Listing	05 31 2010
<input type="checkbox"/>	Analytics	Comparative Income Statement	06 11 2014
<input type="checkbox"/>	Analytics	commitment budget comparative- mar 2013	03 25 2013
<input type="checkbox"/>	Analytics	commitment budget comparative- mar 2013	03 25 2013
<input type="checkbox"/>	Analytics	ap consolidations - os	06 17 2016
<input type="checkbox"/>	Analytics	comparative income statement	04 11 2023
<input type="checkbox"/>	Analytics	consolidations - os	08 16 2019
<input type="checkbox"/>	Analytics	Comparative Income Statement 2	10 25 2019

ViewPoint Library Administrations

To access the ViewPoint Library Administration, navigate to Multiview > ViewPoint BI > ViewPoint Library Administration.



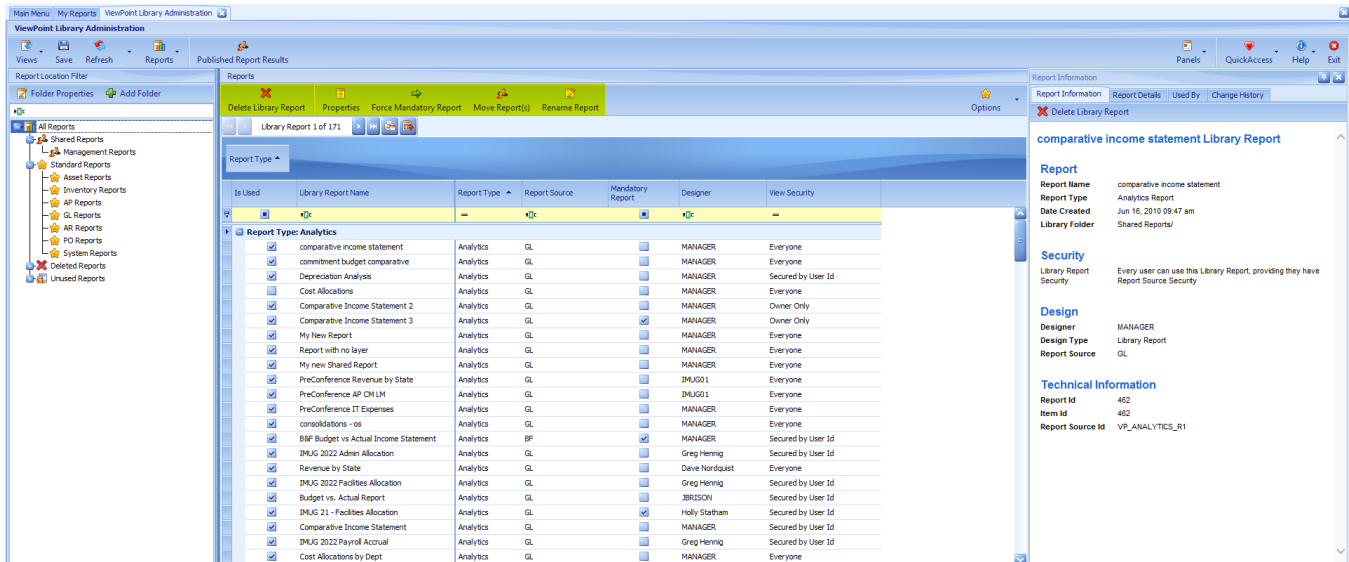
The screenshot shows the 'ViewPoint Library Administration' window. On the left, there's a 'Main Menu' with a tree view showing 'Multiview', 'ViewPoint BI', 'ViewSource 360', 'Workflow', 'General Ledger', 'Budgeting', 'Accounts Payable', 'Accounts Receivable', 'Asset Management', 'Purchase Order', 'Inventory', 'Work Order Entry', 'Order Entry', 'Time Management', 'Project Management', and 'Economy'. The main area displays a list of reports and folders, including 'My Report Lists', 'Published Results', 'ViewPoint Analytics Export to Excel', 'Workflow Todo History List', 'Request Status', 'Refresh Report List', 'ViewPoint Report Administration', 'ViewPoint Setup', 'ViewPoint Options', 'ViewPoint Cube Administration', 'Refresh ViewPoint Cubes', and 'ViewPoint Additional Server Maintenance'.

The Library is the centralized location for all standard reports and other user-created reports that have been added to the Library. The Library is organized in folders by module and shared reports can be found in similar folder organizations that are user-created.

This screen shows you a list of all the reports that are in the library and indicates whether or not they are currently used (i.e. in somebody's "My Reports" screen). You can tell if a report is in use by the "is used" checkbox. If a report is used, you can click on it and go to the "Used By" panel on the right to see

which users have this report in their My Reports screen. This is handy if you are thinking of editing or deleting a report since you can see what users would be impacted by the change.

The toolbar houses many other options that are useful when configuring library settings.



- **Delete Library Report** – This button will delete reports from specific folders.
- **Properties** – This button will open a new window that will look similar to those that we’ve seen before. Here, we can modify the name, subject and category. We can also change the security and the report owner. This is helpful if modifications to the report need to be made, but the report owner is out of office, or no longer works for the company. We are able to come in here and adjust the owner so that another user has the same access.
- **Force Mandatory Report** – This button is similar to the one we saw when sharing reports to the library. This button will force reports to the library of all users who have the necessary security clearance. Please note that the report must be added as a Mandatory Report when adding to the library. If it has not already been added as a Mandatory Report, have the Report Owner re-add it the Library from the “My Reports” module.
- **Move Reports** – This button allows us to move reports from one folder to another.
- **Rename Report** – This button is another location where we can rename a report.

User created folders can be renamed by selecting “Folder Properties” and changing the name. Afterwards, select “OK” and the folder name will change.

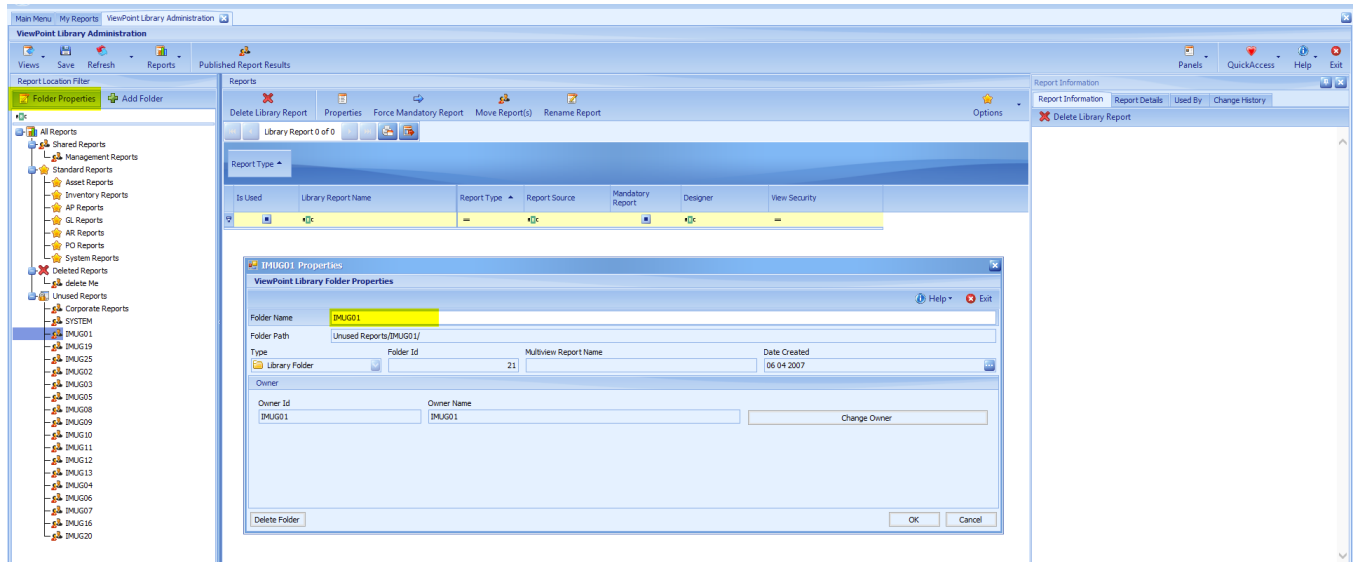
Detailed Reports - Basics

Time: 13:00 - 14:00

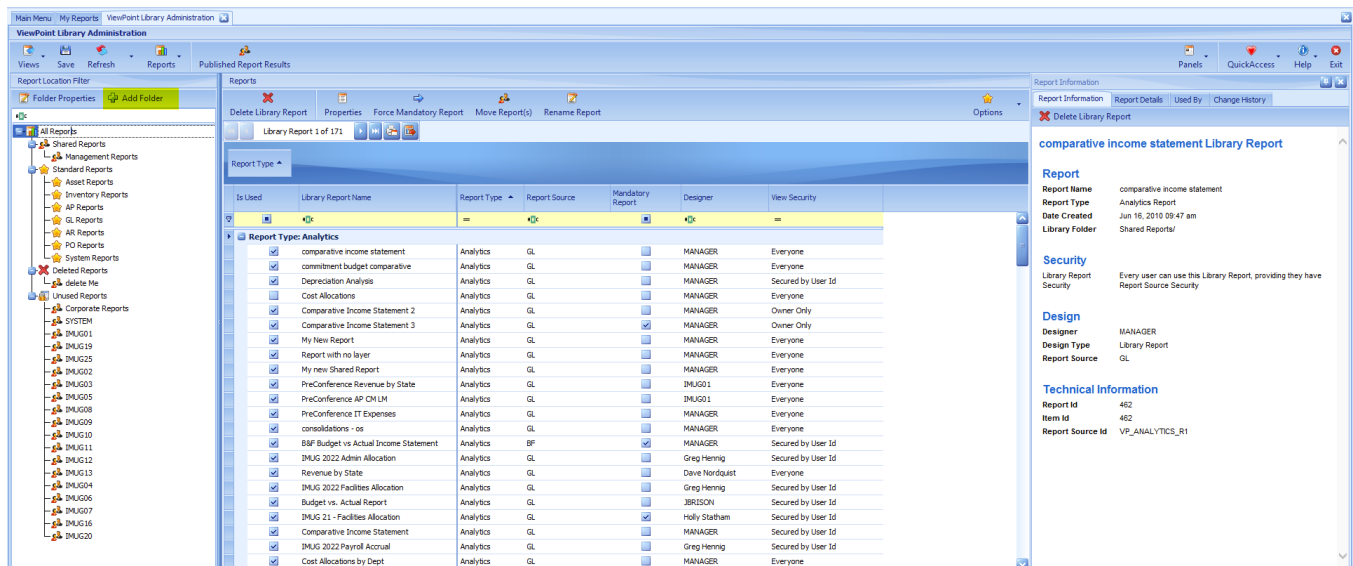
Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



Folders can be created to organize reports by selecting “Add Folder”. Once you create a name and press “OK”, you can then drag and drop reports from the Library into the folder for easy sorting.



ViewPoint Report Administration

Navigate to Multiview > ViewPoint BI > ViewPoint Report Administration to see a full list of all reports. This includes standard Multiview reports, reports added to the library and personal reports that have not been added to the library.

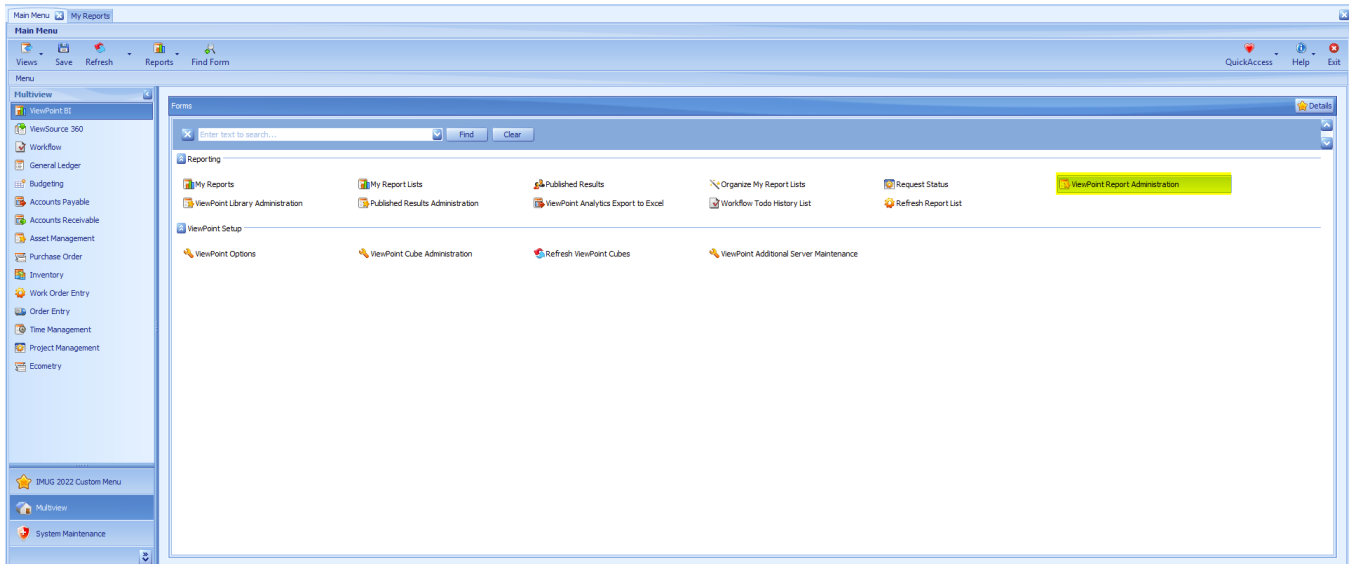
Detailed Reports - Basics

Time: 13:00 - 14:00

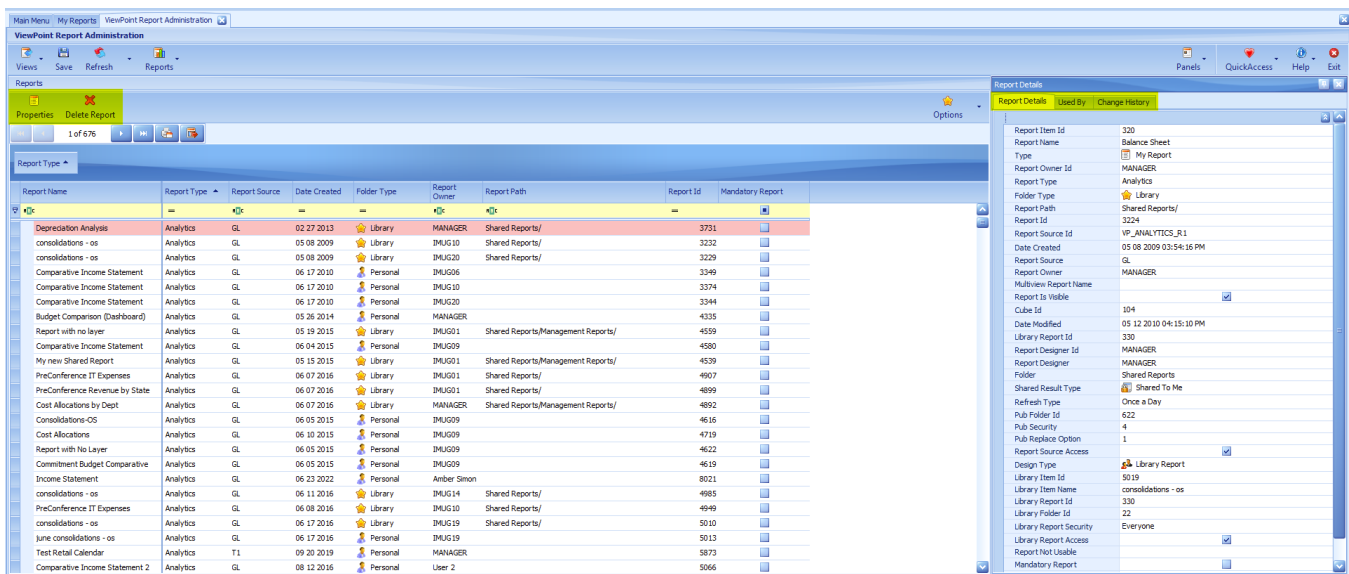
Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



In this module, you can delete reports, change report properties, see report details, view users of the report and view change history.



Automatic Refresh Settings

Reports can be automatically refreshed from the “My Reports” module. This is helpful if you publish the report and would like the report to automatically refresh on a set schedule so that you can avoid having to manually refresh the report for the users viewing the published report.

Select the report and select “Edit Report Settings”.

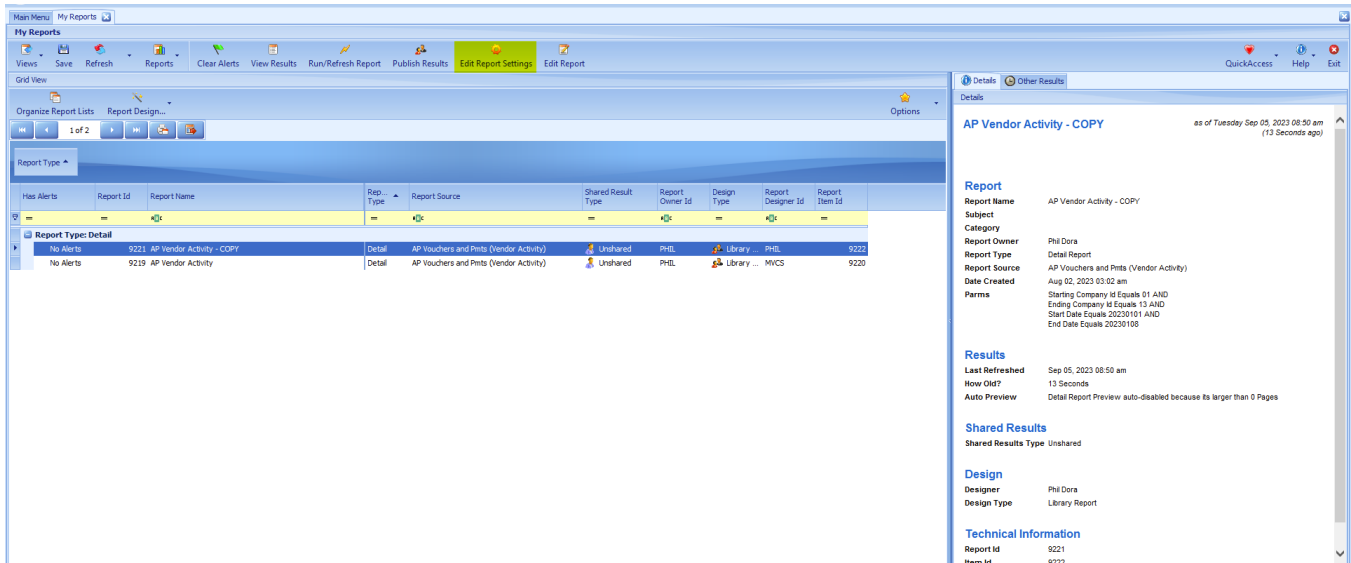
Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023



The screenshot shows the 'My Reports' window with the 'AP Vendor Activity - COPY' report selected. The report details are as follows:

Report Name	Subject	Category	Report Owner	Report Type	Report Source	Date Created	Params
AP Vendor Activity - COPY	AP Vendor Activity - COPY	Phil Dora	Detail Report	AP Vouchers and Pmts (Vendor Activity)	Aug 02, 2023 03:02 am	Starting Company Id Equals 01 AND Ending Company Id Equals 13 AND Start Date Equals 20230101 AND End Date Equals 20230108	

Results:

- Last Refreshed: Sep 05, 2023 08:50 am
- How Old?: 13 Seconds
- Auto Preview: Detail Report Preview auto-disabled because its larger than 0 Pages

Shared Results:

- Shared Results Type: Unshared

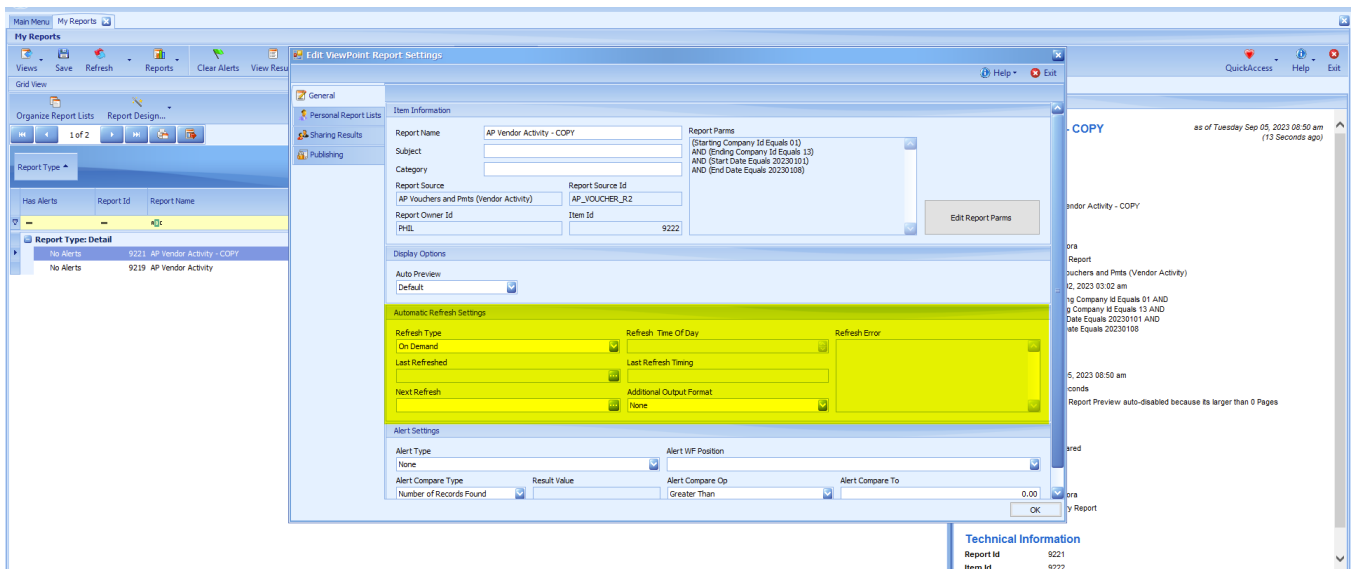
Design:

- Designer: Phil Dora
- Design Type: Library Report

Technical Information:

- Report Id: 9221
- Item Id: 9222

Located in the General tab are the report refresh settings. Once set, select "OK".



The screenshot shows the 'Edit ViewPoint Report Settings' dialog box with the 'General' tab selected. The settings are as follows:

Item Information:

- Report Name: AP Vendor Activity - COPY
- Subject: (Empty)
- Category: (Empty)
- Report Source: AP Vouchers and Pmts (Vendor Activity)
- Report Owner Id: PHIL
- Item Id: 9222

Report Params:

- (Starting Company Id Equals 01 AND
Ending Company Id Equals 13 AND
Start Date Equals 20230101 AND
End Date Equals 20230108)

Display Options:

- Auto Preview: Default

Automatic Refresh Settings:

- Refresh Type: On Demand
- Refresh Time Of Day: (Empty)
- Refresh Error: (Empty)
- Last Refreshed: (Empty)
- Next Refresh: (Empty)
- Additional Output Format: (Empty)

Alert Settings:

- Alert Type: None
- Alert Compare Type: Result Value
- Alert Compare Op: Greater Than
- Alert Compare To: 0.00
- Number of Records Found: (Empty)

If you find that the report is not automatically refreshing, verify the System Alert Service is Pending and not On Hold. This is found in System Maintenance > System Administration > Manage Services.

Detailed Reports - Basics

Time: 13:00 - 14:00

Date: Monday, October 16, 2023

Time: 10:00 - 11:00

Date: Tuesday, October 17, 2023

Manage Services

Views Save Refresh Reports Hold Service **Remove Hold** Run Now Edit Service Frequency Clear Service Error Flag

Auto Refresh

Services

Service 18 of 18

Service	Actual Run Frequency	Resubmit Type	Status	Batch Result	Time Until Service Runs Next	Next Time Service Will Run
ViewPoint Cube Refresh Group 2	60.00 Minutes	On Hold	On Hold	No Errors	On Hold	01/08/2014 11:44:42 AM
ViewPoint Cube Refresh Group 3	60.00 Minutes	On Hold	On Hold	No Errors	On Hold	01/08/2014 11:44:42 AM
ViewPoint Cube Refresh Group 4	60.00 Minutes	Pending	Pending	No Errors	23 Seconds	09/05/2023 03:02:33 PM
Purge Message, Logon and Audit Details	1.00 Sunday	On Hold	On Hold	No Errors	On Hold	02/08/2015 03:02:00 PM
ViewPoint Cube Refresh Group 1	1.00 Minutes	Pending	Pending	No Errors	5 Seconds	09/05/2023 03:02:15 PM
Pending Requisition Service	60.00 Minutes	On Hold	On Hold	No Errors	On Hold	05/05/2020 06:46:00 AM
Workflow Reminder Service	60.00 Minutes	Pending	Pending	No Errors	10 Minutes and 49 Seconds	09/05/2023 03:12:59 PM
Workflow Approve by Email Service	5.00 Minutes	Pending	Errors	3 Minutes and 43 Seconds	09/05/2023 03:06:53 PM	
External Document AutoLoad Service	1.00 Minutes	Pending	Errors	8 Seconds	09/05/2023 03:02:18 PM	
Email Service	1.00 Minutes	Pending	Errors	3 Seconds	09/05/2023 03:02:13 PM	
Logon Audit Download Service	60.00 Minutes	On Hold	On Hold	No Errors	On Hold	05/28/2010 03:30:04 PM
Optimize Journal Transaction Summary Service	60.00 Minutes	On Hold	On Hold	No Errors	On Hold	01/30/2017 11:25:17 AM
OCR File Transfer Service	1.00 Minutes	Pending	Pending	No Errors	7 Seconds	09/05/2023 03:02:17 PM
Expense Report Process Mailbox Service	60.00 Minutes	On Hold	Errors	On Hold	On Hold	01/30/2017 12:16:10 PM
Web Service List Publisher	1.00 Sunday	On Hold	No Errors	On Hold	On Hold	02/05/2017 11:39:00 AM
FTP File Transfer Service	1.00 Minutes	Pending	Errors	4 Seconds	09/05/2023 03:02:14 PM	
Interface WebService Service	1.00 Sunday	On Hold	Errors	On Hold	On Hold	02/05/2017 09:56:00 AM
System Alert Service	60.00 Minutes	Pending	Errors	13 Minutes and 53 Seconds	09/05/2023 03:13:05 PM	

Service Log Last Results Last Master Log Service

Result 0 of 0

Result Type Result Text View