

Reports

How to Access Reports in FAMIS

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How to Access Reports

Reports can be found in the following locations:

- FAMIS Custom Reports
- Discoverer
- FAMIS Self Service

FAMIS Custom Reports

1. Log into FAMIS

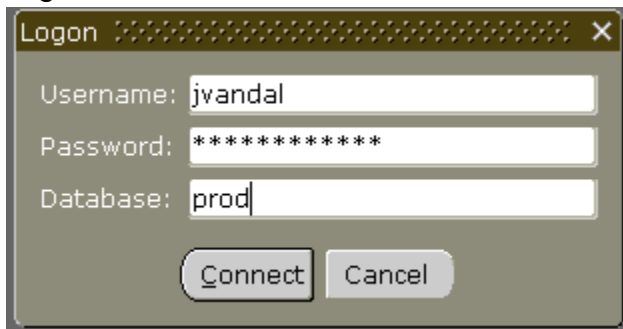


Figure 1 FAMIS Login

2. In the FAMIS Xi Navigator, select CUSTOM REPORTS from the drop down menu (menu items will vary depending on your assigned roles).

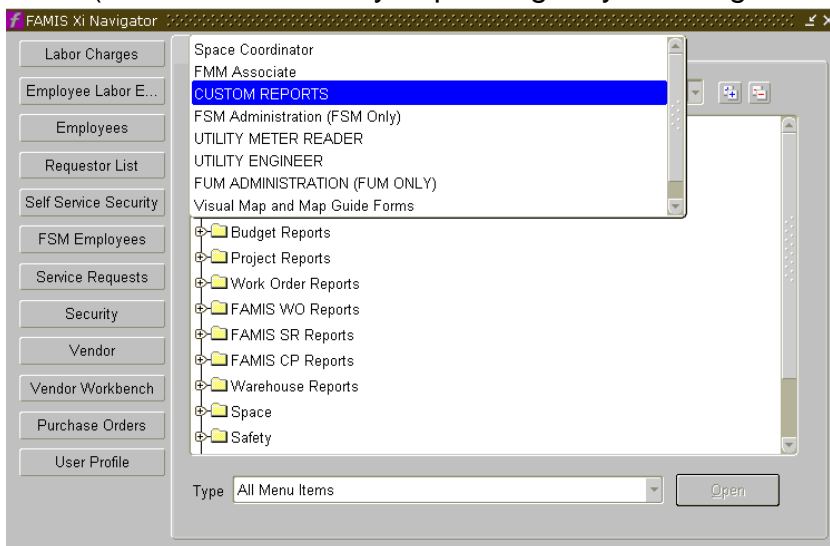


Figure 2 - FAMIS Custom Reports

3. Custom Reports Screen

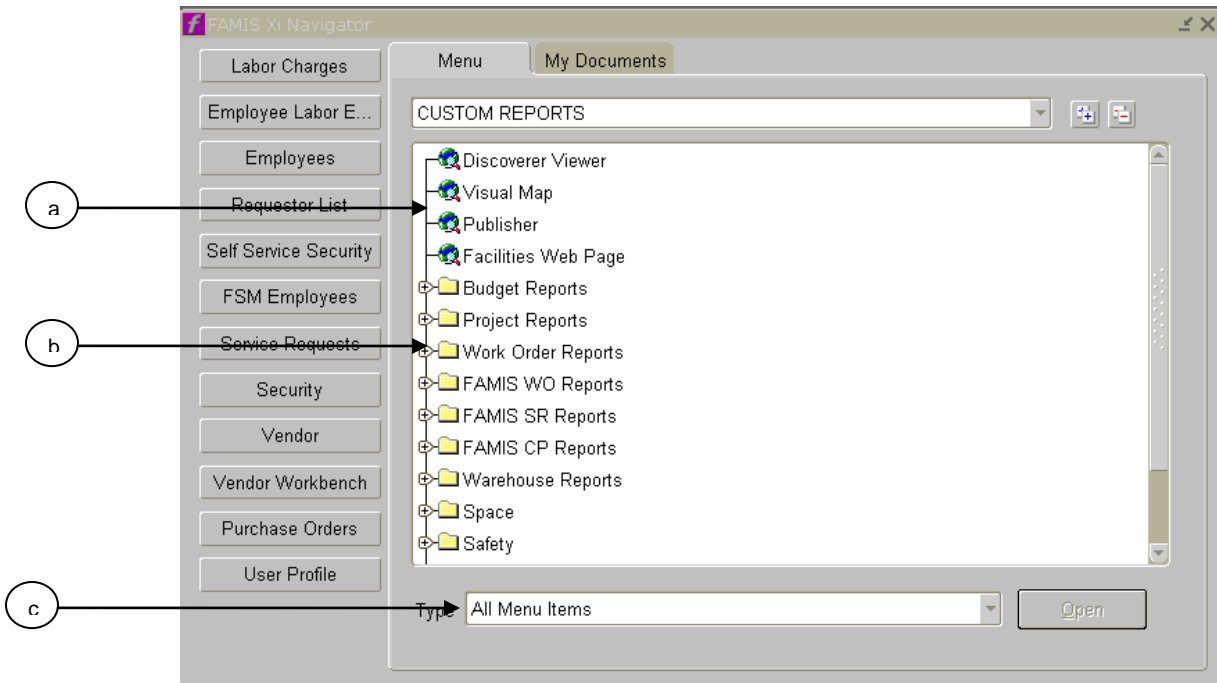


Figure 3 - Custom Reports Nomenclature

- b. Report Folders
- c. Report Type Drop Down List

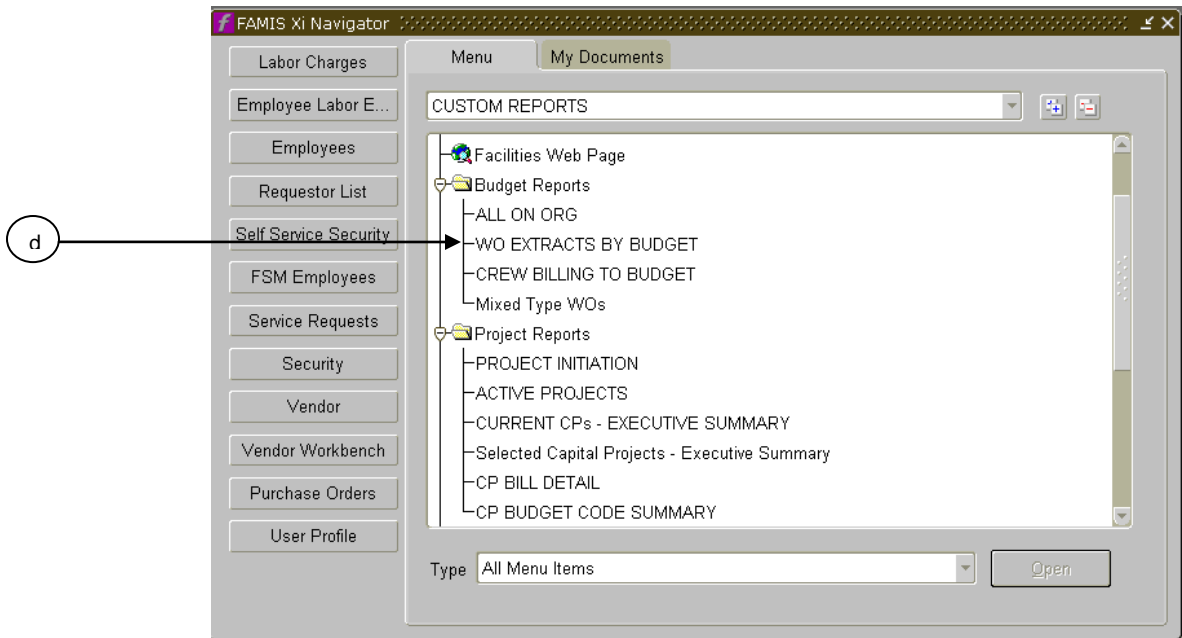


Figure 4 - Reports

- d. Reports in Expanded Report Folders

Accessing Web Based Reports Within FAMIS

1. To access web based reports from within FAMIS, click one of the links at the top of the Custom Reports menu.
2. The report will open in your default web browser (such as Firefox or Internet Explorer). In the example below, Discoverer Viewer was clicked.

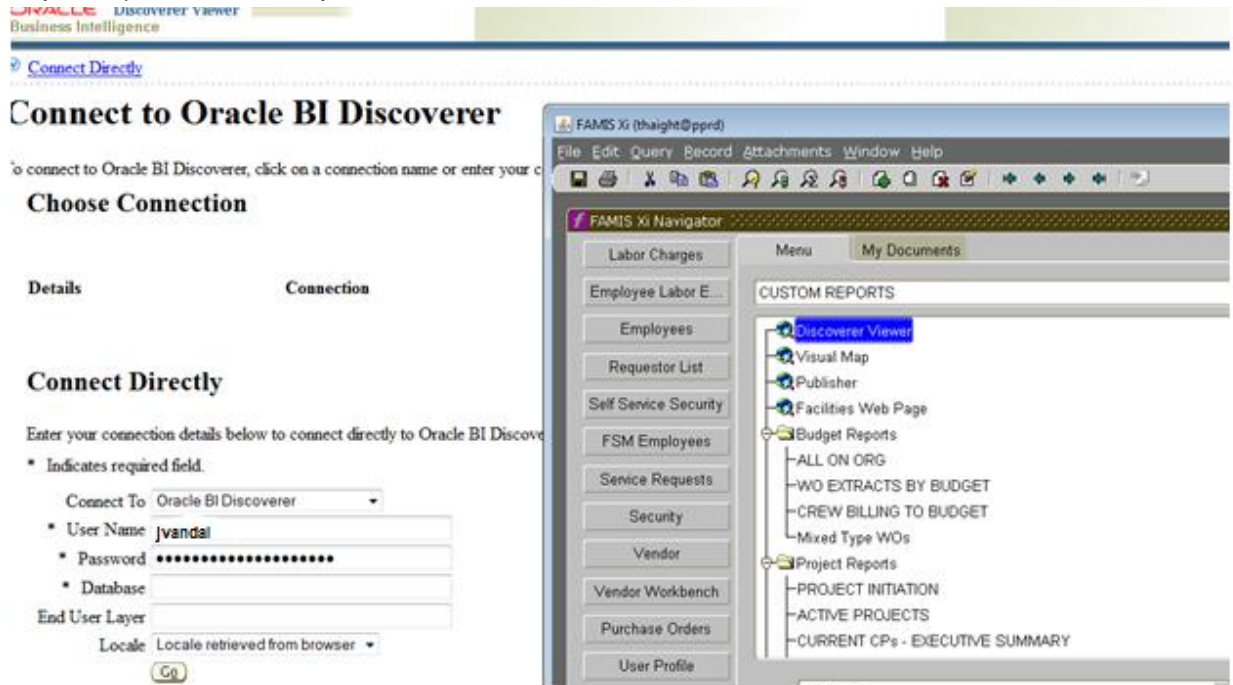


Figure 5 Discoverer Login

3. Note, if the page does not open, your pop-up blocker may be preventing the page from opening. To change your pop-up options, see the section below for instructions for your browser.

Allowing for Pop Ups In Firefox

If you get this message when you try to open a web page from FAMIS:

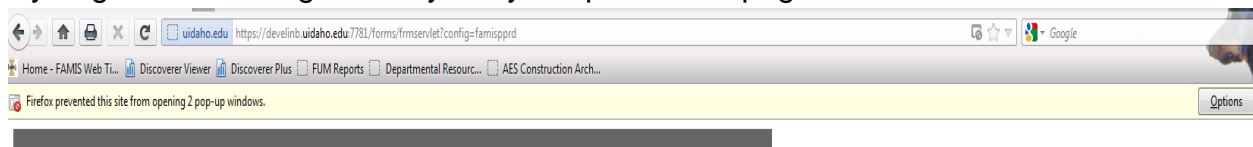


Figure 6 Firefox Pop-Ups

1. Click the Options button

2. Select Allow pop-ups for *site.domain* (usually the top selection)

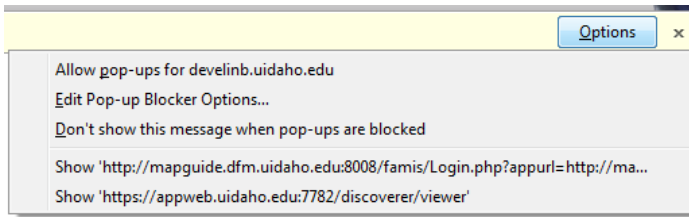


Figure 7 - Select Site to Allow Pop-Ups

3. The yellow bar should close
4. Try the site again.

Allowing for Popups in Internet Explorer For A Specific Site

1. In Internet Explorer, click Tools
2. Click **Pop-Up Blocker**, then click **Pop-Up Blocker Settings**

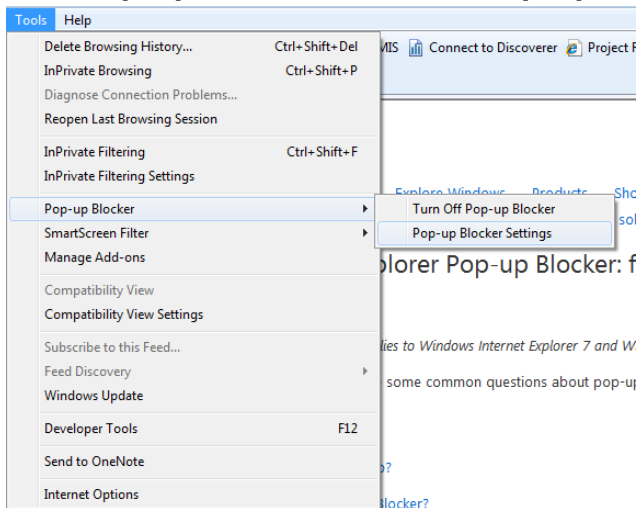


Figure 8 IE Pop-Ups

3. In the **Address of the website to allow**, type the address of the website you want to see pop-ups from, then click **Add**.

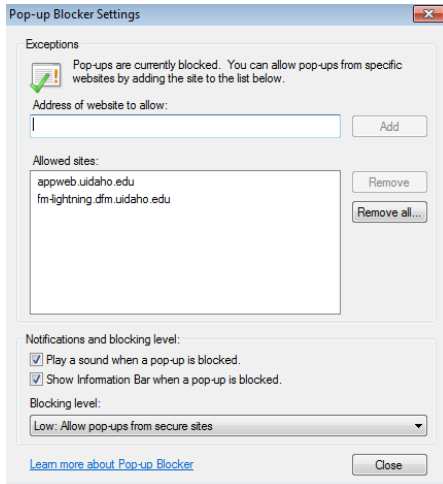


Figure 9 - IE Pop-Up Settings

4. Repeat step 3 for each site you want to allow pop-ups from
5. When you are finished, click **Close**.
(Internet Explorer Pop-up Blocker: frequently asked questions)

Accessing FAMIS Custom Reports

To access a Custom Report in FAMIS:

1. In FAMIS, click on the desired report

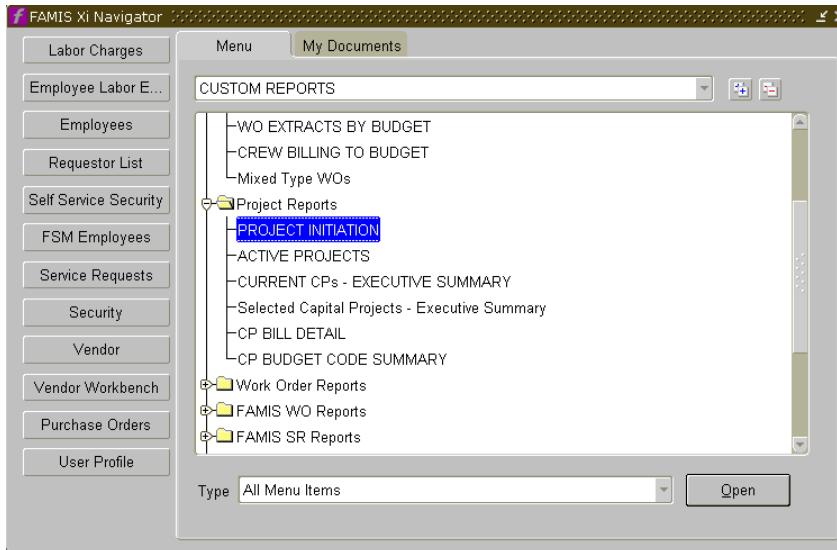


Figure 10 - Custom Reports In FAMIS

2. Oracle Reports page will open in your default web browser.
3. In the Database User Authentication screen, enter your
 - a. User name,

- b. Password,
- c. Database
 - i. PROD – Production
 - ii. PPRD – Pre-Production (Test)

Database User Authentication

User name:

Password:

Database:

4. **Figure 11 - Oracle Reports Login**

- 5. If the report has a Report Parameters screen, select or enter the desired parameters. In this example, the Project Initiation Report was selected.

Report Parameters
Enter values for the parameters

Destination Type

Format (PDF to E-Mail)

Days Before Present

Earliest Request Date

Safety Requests?

Sort by -

Show - Reject/Cancel? Hold/Suspend? Comments?

Cache ▾

PDF

7

01-SEP-02
(01-JUL-99, 01-SEP-02, 30-JUN-11)

ALL ▾

DATE ▾

Enter number of days before present that project was entered into FAMIS. Enter earliest date for project request. Filter Safety Requests. Order by Date Ascending or Priority Descending. Select Y or N to show Rejected/Suspended or Hold

Figure 12 - Oracle Reports Parameters Screen

- a. For dates, enter in the format dd-MON-YYYY, such as 30-JUN-2011.
- b. Select options from the drop down lists to narrow down the report request.
- c. In the example below, the Earliest Date Request was changed to 30-JUN-11, and SAFETY was selected from the Safety Requests? drop down list.

Report Parameters
Enter values for the parameters

Destination Type
Format (PDF to E-Mail)
Days Before Present
Earliest Request Date
Safety Requests?
Sort By -
Show - Rejected/Cancel? Hold/Suspend? Comments?

Cache
PDF
7
30-JUN-11
(01-JUL-99, 01-SEP-02, 30-JUN-11)
SAFETY
DATE

Submit Query Reset

number of days before present that project was entered into FAMIS. Enter earliest date for project request. Filter Safety Requests Order by Date Ascending or Priority Descending Select Y or N to show Rejected/Suspended or Hold

Figure 13 - Oracle Reports Parameters

- d. Click the Submit Query button
- e. The report will be converted to PDF format, and will appear in your default web browser.

University of Idaho
FACILITIES PROJECT INITIATION
Sort by DATE
New projects entered into FAMIS up to 7 days ago Projects since - 30-JUN-11 Show - SAFETY Rejected /Cancelled? Y Hold ? Y Comments? Y
Last Modified 11/28/08

Review Projects -

Request	Description	Priority	Proj. No.	Dept. Contact	PM	Budget	Status
29-JUN-12	MORRILL HALL 4TH FLOOR EPSCOR MOVE UPGRADES	4	SR142363	LODI PRICE			REVIEW
# 1	017 MORRILL HALL	INCLUDES MISCELLANEOUS PAINTING AND CARPET UPGRADES TO FOURTH FLOOR TO ACCOMMODATE THE MOVING OF EPSCOR STAFF INTO THE BUILDING. PROJECT WILL ALSO INCLUDE LIGHT REMODELING AND RENOVATION OF ROOM 402 TO COVERT THIS SPACE INTO A MULT-MEDIA AV CONFERENCE ROOM.					

>>> End of Projects for Review <<<

Figure 14 - Report Example

Accessing Discoverer Reports

Discoverer reports can be accessed by either:

1. Clicking the Discoverer Viewer link in FAMIS under Custom Reports

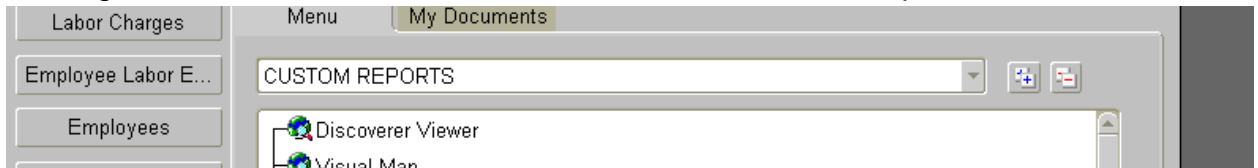


Figure 15 - Discoverer in FAMIS

2. Going to FAMIS Self Service (<https://bannerweb.uidaho.edu:7781/FAMIS/uiss.home>) , then clicking Discoverer Viewer
3. In the Connect to Oracle BI Discoverer screen, enter your
 - a. User Name

- b. Password
- c. Database
 - i. PROD – Production
 - ii. PPRD – Pre-Production (Test)
- d. Click the Go button

Connect Directly

Enter your connection details below to connect directly to Oracle BI Discoverer.

* Indicates required field.

Connect To

* User Name

* Password

* Database

End User Layer

Locale

Figure 16 - Discoverer Login

- e. The reports visible are those that you have been granted access to. You can scroll down the list to find the report, or you can enter part of the name in the Search box, then click Go.

Worksheet List

Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search All Workbooks


Result List

[Expand All](#) | [Collapse All](#)



Focus	Name	Description	Owner	Last Modified
▼ Discoverer Workbooks				
▶	cost_transfers_ui.DIS	Asset Accounting FAMIS Cost Transfer Report	FAMIS_LIBRARY	Tuesday, December 13, 2011 7:51:22 AM PDT
▶	cp_dead_budgets_ui.dis		FAMIS_LIBRARY	Wednesday, May 25, 2011 4:57:46 AM PDT
▶	cp_invoices_ui.DIS	Asset Accounting FAMIS Invoice/Misc. Cost Report	FAMIS_LIBRARY	Tuesday, December 13, 2011 7:46:21 AM PDT

Figure 17 - Worksheet List

- f. Click the  next to the report to expand the worksheets for the report



- g. Click the worksheet (usually underlined blue text)
- h. If there is a parameter screen, enter or select from the drop down lists to narrow the report results.

cost_transfers_ui.DIS - Cost Transfers

Last run Friday, June 29, 2012 11:24:02 AM PDT

Worksheets
Cost Transfers

Parameters Needed

Select values for the following parameters.
* Indicates required field

* Enter Begin Date
(Example: 29-JUN-2012)

* Accept Today's Date or Enter Earlier Date
(Example: 29-JUN-2012)

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[About Oracle BI Discoverer Viewer Version 11.1.1.4.0](#)
[Oracle Technology Network](#)

[Preferences](#) | [Exit](#) | [Help](#)

Figure 18 - Discoverer Parameters

- i. Dates have to be in dd-MON-yyyy format, unless told otherwise.
- j. Click the GO button.

Last run Friday, June 29, 2012 11:24:33 AM PDT

Actions
[Rerun query](#)
[Save](#)
[Save as](#)
[Revert to saved](#)
[Printable page](#)
[Export](#)
[Send as e-mail](#)
[Worksheet options](#)

Worksheets
Cost Transfers

FAMIS Cost Transfers Between Begin Date : '01-JAN-2012' , End Date : 'TODAY'

Report Date 29-JUN-12

Parameters

Select values for the following parameters.
* Indicates required field

* Enter Begin Date
(Example: 29-JUN-2012)

* Accept Today's Date or Enter Earlier Date
(Example: 29-JUN-2012)

Table

Tools [Layout](#) [Format](#) [Stoplight](#) [Sort](#) [Rows and Columns](#)

Page 1 of 5

25 Rows Row Navigation Options [Down](#) Rows 1-25 of 122, Columns 1-6 of 10 [Left](#) 6 Columns Column Navigation Options [Right](#)

WO	Misc Cost	MC Desc	Extract Date	MC Comment	Debit Org
WO164736	MC010465	COST TRANSFER	23-FEB-2012	LABOR CHARGES ON MAINTENANCE BUDGETS THAT WERE BILLED THAT NEED TO BE CREDITED BACK.	RCX672
WO170191	MC010466	COST TRANSFER	23-FEB-2012	LABOR CHARGES ON MAINTENANCE BUDGETS THAT WERE BILLED THAT NEED TO BE CREDITED BACK.	RCX140
WO173074	MC010656	COST TRANSFER	11-MAY-2012	LABOR CHARGES ON MAINTENANCE BUDGETS THAT WERE BILLED THAT NEED TO BE CREDITED BACK.	RCX672

Figure 19 - Discoverer Report Example

- k. To export the report to Excel, click Export
- l. In the Choose export Type, select Microsoft Excel Workbook (*.xls) from the drop down list.

Choose export type

Use the drop-down list to specify the export file format.

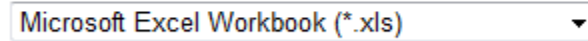
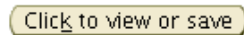


Figure 20 - Export Type

- m. Click the **Export** button (on the far right side of the screen).
- n. On the Export Ready screen, click **Click to view or save**

Export Ready

The export you requested is ready. Please click the button below to open the exported document to view or save it.



[Return to worksheet](#)

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[About Oracle BI Discoverer Viewer Version 11.1.1.4.0](#)
[Oracle Technology Network](#)

- o. In the Opening xxxxxxxxxxxxxx.xls box, choose whether you want to open or save the spreadsheet (if you choose to save the file, it will be downloaded to your Downloads directory).

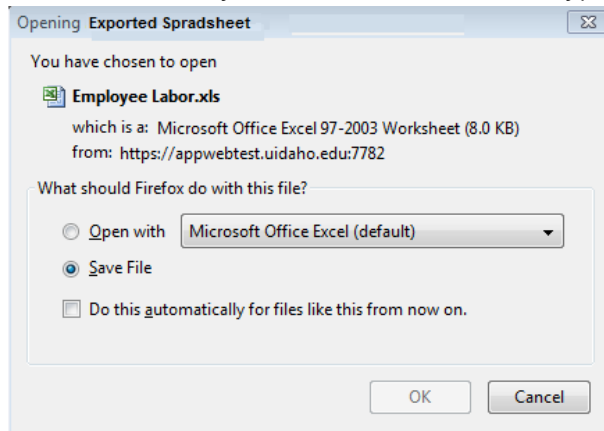


Figure 21 - Download Excel Spreadsheet

Employee	Work Date	Wo Numb	Description	Hours	Pay Code	Description	Labor Stat	Supervisor	Crew
HAITIM	25-Jun-12	S1200320	FACILITIES	8	REGULAR DEFAULT	E APPRO'	REACAR	FMADMIN	
HAITIM	26-Jun-12	S1200320	FACILITIES	8	REGULAR DEFAULT	E APPRO'	REACAR	FMADMIN	
HAITIM	27-Jun-12	S1200320	FACILITIES	8	REGULAR DEFAULT	E APPRO'	REACAR	FMADMIN	
HAITIM	28-Jun-12	S1200320	FACILITIES	8	REGULAR DEFAULT	E APPRO'	REACAR	FMADMIN	
HAITIM	29-Jun-12	S1200320	FACILITIES	8	REGULAR DEFAULT	E APPRO'	REACAR	FMADMIN	

Figure 22 Example of Spreadsheet

FAMIS Self Service

Accessing Reports from the Departmental Resource Center

The web based reports in the Departmental Resource Center are for the OSP Space Survey. To access these reports:

1. Go to the FAMIS Home Page (<http://banner.uidaho.edu/famis/index.htm>)

FAMIS Self-Service




2. Click
3. Click  *Space Survey Resources
4. In the Departmental Resource Center, log in using your:
 - a. User Name
 - b. Password

Figure 23 - Dept Resource Center Login

5. Click the Login button

Departmental Resource Center

FAMIS Guide and Space Survey Training Materials

The Space Survey is necessary in order for the UI to most effectively prepare an F&A (Facilities and Administration) rate proposal to the Federal government. To legitimately maximize the F&A rate (the rate the UI charges outside parties for overhead) a Space Survey is required.

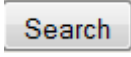
The FAMIS system has been modified to allow for entry of Space Survey data and the following guide has been created to help with the process.

- Phase I Training
- Instructions for Printing Phase II Spreadsheets in Excel
- Phase II Training
- Appendix A - Room Use Codes
- Appendix B - Room Function Codes
- Appendix C - Compare and Contrast Room Use vs. Functional Use
- Appendix D - Phase II Walk Through Do's and Don't's
- Appendix E - Room Function Examples
- Appendix N - A Note about Notebooks
- Appendix P - Payroll - NWRPREX
- Appendix U - FAMIS Space Survey User Guide
- FY12 Space Survey Calendar
- Space Survey FY12 (Dean's PowerPoint)

Survey Resources

- Certification Statement by Departmental Coordinator and Department Chairperson
- Building Reference Plans (BRP)
- Accounts Not Entered For Functional Code 2OR
- Function Code 1IDR Not Changed
- Rooms By Department ID
- Space Coordinators FY12

Figure 24 - Departmental Resource Center

6. Click the link to the desired report.
7. Many of the reports have a drop down to select a department. Select the department, and then click the  button.

Departmental Resource Center

Select Dept   

* You may have to click the Print Report button twice the first time when printing reports.

Figure 25 - Parameter Screen

8. Click the  to export the report to Excel

Departmental Resource Center

Select Dept: 126 - COLLEGE OF ENGINEER

* You may have to click the Print Report button twice the first time when printing reports.

Department: COLLEGE OF ENGINEERING (126)
Function Code 1IDR Not Changed (PPRD)

BUILDING	ROOM	DEPT_ID	DEPT_NAME	FUNCTION_CODE	FUNCTION_PERCENT
028	040	126	COLLEGE OF ENGINEERING	1IDR	80
028	040A	126	COLLEGE OF ENGINEERING	1IDR	80
028	128	126	COLLEGE OF ENGINEERING	1IDR	100
028	B34	126	COLLEGE OF ENGINEERING	1IDR	100

Latest Update: 28-JUN-2012

Figure 26 - Report Example

- To print the report, click the (you may have to click it twice for the report to print).

Accessing the Utility Management Budget Report

The Utility Management Budget Report displays utility budget information for the selected billing period. To access this report:

- Go to FAMIS Self Service (see the previous section for how-to instructions).
- Click
- Select the Bill Period from the "Select Budget" drop down list

Utility Management Budget Report

Select Bill Period 01-MAY-2012

Select Budget(s)

- BIS600
- BIY300
- BIY400
- NBY040
- NKA001

Parameters For instructions, click [here](#) (opens in a separate window).

Bill Period:

Budgets:

Figure 27 - Utility Budget Report

- Select the desired budget(s) from the "Select Budget(s) drop down list.
- To select multiple budgets,
 - Select the first budget

- b. Go to the next budget to be selected
- c. Hold the CTRL key
- d. Select the next budget
- e. Repeat b-d for each budget

Select Bill Period 01-MAY-2012

Select Budget(s)

- BIS600
- BIY300
- BIY400
- NBY040
- NKA001

Search Refresh

Figure 28 - Utility Budget Report Parameters

- f. Click the Search button

Utility Management Budget Report

Parameters For instructions, click [here](#) (opens in a separate window).

Select Bill Period: 01-MAY-2012 Bill Period: 01-MAY-2012

Select Budget(s): BIS600, BIY300, BIY400, NBY040, NKA001 Budgets: BIS600,NKA001

Search Refresh

DEBIT ORG	METER ID	UTILITY	BLDG	BLDG NAME	BILL PERIOD START DATE	USE	USE LAST YEAR	UNITS	PERCENT DIFFERENCE	AMOUNT
NKA001	CN0049-0-143	STEAM	143	STUDENT RECREATION CENTER	01-MAY-2012	200,000	211,249	LBS	-5.22%	\$2,062.00
NKA001	CN0050-0-143	STEAM	143	STUDENT RECREATION CENTER	01-MAY-2012	29,500	27,822	LBS	6.03%	\$204.15
NKA001	CN0051-0-143	STEAM	143	STUDENT RECREATION CENTER	01-MAY-2012	17,750	17,159	LBS	3.44%	\$182.99
NKA001	CW3008-0-143	CHILLED WATER	143	STUDENT RECREATION CENTER	01-MAY-2012	4,500	0	TON HOURS	0%	\$453.15
NKA001	DW7051-0-143	DOMESTIC WATER	143	STUDENT RECREATION CENTER	01-MAY-2012	39,903	39,903	CU FT	0%	\$121.70
BIS600	ELM004-0-072	ELECTRIC	072	FARM RESIDENCE - BEEF	01-MAY-2012	1,663	1,363	KWH	21.83%	\$90.13
NKA001	ELM047-0-143	ELECTRIC	143	STUDENT RECREATION CENTER	01-MAY-2012	59,266	87,828	KWH	-32.57%	\$3,212.21
NKA001	ELM048-0-143	ELECTRIC	143	STUDENT RECREATION CENTER	01-MAY-2012	7947	7918	KWH	0.37%	\$430.73
NKA001	SEW013-0-143	SEWER	143	STUDENT RECREATION CENTER	01-MAY-2012	85,563	85,563	GSP	0%	\$1,441.74
TOTAL										\$8,298.80

Figure 29 - Example Report

- g. Mouse over the field names for an explanation of the fields.

Bibliography

Internet Explorer Pop-up Blocker: frequently asked questions. (n.d.). Retrieved June 30, 2012, from windows.microsoft.com: <http://windows.microsoft.com/en-us/windows-vista/internet-explorer-pop-up-blocker-frequently-asked-questions>

Change History

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30 June 2012	Initial Document	Tim Haight