ViewDirect – Enterprise Edition Job Aid

This job aid provides information about using ViewDirect – Enterprise Edition.

Enterprise Folders is a graphical representation containing links with all of the information necessary for accessing reports from ViewDirect. Choosing to use the Enterprise Folders option:

- Allows you to personalize access to information and create multiple views of the same report -- for example, by date, by type, or by customer -- without ever replicating the reports.
- Allows you to modify the contents of folders by dragging any item from the document server - including reports, report versions, sections, topics, topic versions, or topic items.
- Allows you to copy or move reports within Enterprise Folders.
- There is no limit on the number of Enterprise Folders you can create.

If you opt for Enterprise Folders functionality, there are additional downloads you may need to install. Visit https://apps.uillinois.edu/support/documentdirect/ for more information on these additional requirements.

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Quick Instructions: Accessing Reports with ViewDirect

1. Go to the following url: https://docdirectpweb.admin.uillinois.edu/ddrint/servlet/ddrintee
2. Click on DocumentDirect & UI2 Report.
3. A pop-up window will appear. Enter your Enterprise ID and password (the same ID and password you use to logon to Banner) to logon to ViewDirect.
4. A menu will appear on the left side of the screen displaying "Topic" and "Report".
5. Click on the "Report" heading. You will see the list of reports available to your ID.
6. Select the report you would like to view.

   To see all versions of the report:
   - Click once on the plus sign of the icon, or
   - Double-click on icon

   To get the latest version of the report, click once on the Quick Open icon 📜.

7. The report displays. If the report is a PDF, it displays in the version of Adobe Acrobat Reader that is installed on your computer.

NOTE: ViewDirect times out after one hour of inactivity.
Navigating ViewDirect

After opening a report, your browser will appear similar to the picture below. The left pane displays your available reports, while the right one displays the report, once you have selected one to display. Each area is covered in more detail below.

**Left Pane - Displays available reports**

- ViewDirect
- Enterprise Guide and UI2 Report
- Report
- GL Transaction Lines: 001
- General Ledger Statement Chart
- General Ledger Statement Chart 2

**Right Pane – Displays selected report**

1. Error Description:
   - Error Level: E
   - Error Time: 09/22/2008 11:11:49

2. Error Description:
   - Error Level: E
   - Error Time: 09/22/2008 11:11:49

3. Error Description:
   - Error Level: E
   - Error Time: 09/22/2008 11:11:49
The Left Pane

In the graphic below, each area of the left pane is displayed.

- Left Navigation Tool Bar
- Use the + to expand and the - to collapse report
- Report ID
- Use the arrow to move viewing window
- Scroll Bar
- Report Name
The Right Pane

Once you have a report open, it displays in the right side of the browser window, as the example below (BANNER and HTML report view):
**Tool Bar Icons**

The tool bar icons, both for the left and right panes of ViewDirect, are listed below.

**Left Pane**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Label</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Locate" /></td>
<td>Locate</td>
<td>Allows you to directly access a report by report name and other search criteria (for example, an organization, if you have access to more than one).</td>
</tr>
<tr>
<td><img src="image" alt="Open" /></td>
<td>Open</td>
<td>Opens the most recent version of the report you have selected.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refresh</td>
<td>Updates the list of reports.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Print</td>
<td>Allows you to print the entire report.</td>
</tr>
<tr>
<td><img src="image" alt="Download" /></td>
<td>Download</td>
<td>Downloads the report to your computer or other specified location.</td>
</tr>
<tr>
<td><img src="image" alt="New" /></td>
<td>New</td>
<td>Creates a new personal folder for you</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Delete</td>
<td>Allows you to delete a personal folder, or a report you have created in your personal folder.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>Copy</td>
<td>Allows you to copy reports into your personal folders</td>
</tr>
<tr>
<td><img src="image" alt="Move" /></td>
<td>Move</td>
<td>Allows you to move reports within your personal folders</td>
</tr>
<tr>
<td><img src="image" alt="Preferences" /></td>
<td>Preferences</td>
<td>View the folder location on your computer where your personal folders are stored</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Displays online help for ViewDirect</td>
</tr>
</tbody>
</table>
Right Pane (BANNER, HTML report view)

-OR-

Right Pane (PDF, Text report view)

<table>
<thead>
<tr>
<th>Icon</th>
<th>Label</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous Page</td>
<td>Scrolls to the next page in the report</td>
</tr>
<tr>
<td></td>
<td>Next Page</td>
<td>Scrolls to the previous page in the report</td>
</tr>
<tr>
<td></td>
<td>Print</td>
<td>Allows you to print the entire report</td>
</tr>
<tr>
<td></td>
<td>Print Current page</td>
<td>Prints only the page of the report displaying</td>
</tr>
<tr>
<td></td>
<td>Search</td>
<td>Searches within the report for text. If a match is found, the first 'found' match is highlighted in blue. To search for other possible matches, use the “Search Again icon.</td>
</tr>
<tr>
<td></td>
<td>Search Again</td>
<td>See above; locates additional text matches within the report.</td>
</tr>
<tr>
<td></td>
<td>Go To</td>
<td>Allows you to go to a specific page of the report</td>
</tr>
<tr>
<td></td>
<td>Filter by field</td>
<td>Filter output in data definition table</td>
</tr>
<tr>
<td></td>
<td>Filter by line</td>
<td>Filter output in data definition table</td>
</tr>
<tr>
<td></td>
<td>Download</td>
<td>Downloads the report to your computer or other specified location</td>
</tr>
<tr>
<td></td>
<td>Change View</td>
<td>Increase or decrease the report image</td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td>Allows you to change the format of the report (i.e. PDF, HTML, etc.)</td>
</tr>
<tr>
<td></td>
<td>Create a table</td>
<td>Provides a template for exporting.</td>
</tr>
<tr>
<td></td>
<td>Help</td>
<td>Displays online help for ViewDirect.</td>
</tr>
<tr>
<td></td>
<td>Logoff</td>
<td>Logs out of ViewDirect. Note that ViewDirect times out after 1 hour of inactivity.</td>
</tr>
</tbody>
</table>
Tips

General

- Please remember to look in the heading of the report to make sure that the criteria of the report is the what you need (i.e. Date range, Organization, etc.).

Working with Personal Folders

- When you create personal folders, that information is stored on your computer. If you are using a computer on which your folders have not been set up, your folders will not appear (for example, if you are using a workstation on which you normally do not work).

To create a personal folder:

1. Make sure the “Enterprise View” section of the menu is highlighted, as in the picture to the right. You cannot create folders if you are in the Document Direct and UI2 Reports section.

2. Click the New icon 📧. A new item will appear in the menu tree, as it does to the right.

3. Type the name of your new folder and hit Enter. In our example, we used ‘COA1SummaryReports’ as the name.

You can create as many folders as you wish, and you can also create sub-folders within folders if desired.

To move reports into your personal folder:

1. Highlight the report you want to copy
2. You can move the report one of two ways:
   - Click the Copy icon. You will be prompted to select the folder in which you wish for the report to be located.
   - Click the report and drag it to the personal folder.

If you pull the entire report folder into your personal folders, it will automatically update when the report updates. If you pull only a section of a report to your personal folder, it does not automatically update, and you must delete it for it to go away.
To delete reports in your personal folder:

1. Highlight the report in your personal folder you want to delete
2. Press the delete key, or click the Delete icon. You will be asked to confirm the deletion.

Searching

- **For a report:** Use the Locate icon on the left menu to search for a specific Report ID, Version ID and/or Section ID. When you click the locate icon, a popup window appears that allows you to enter the report name, date and section.

![Locate window](image)

**NOTE:** For many HR Reports, the section may equal various org codes, if you have access to more than one.

- **Within a report:** Use the magnifying glass icon to search for information within a report.

Display/Settings

- The page number that displays at the bottom of the Acrobat screen is how many pages are displaying at the moment. To find the full number of pages, for the index, please look at the very bottom of the ViewDirect screen.

![Display/Settings](image)
To display each page, one at a time, use the Next Page and Previous Page icons on the top toolbar in ViewDirect.

If your report is appearing separately on the left side of your document direct screen you need to change an Acrobat setting. Go into Acrobat and click on edit on the top toolbar. Then go to preferences and then Internet, click on the ‘Display PDF in browser’ box. This should correct the problem.

**Printing**

- If you want to print multiple sections, select the section you wish to print by clicking on the icon. Use the toolbar at the top of the ViewDirect screen. Click on the printer symbol. When the print box appears, select the last option under “Pages”, which will allow you to add the range of pages in the sections you wish to print. Take that number and use it in the top page number. The page one in the print selection is the current page you are in, in the report. This should give you the multiple indexes you wished to print.

- To print the current index you have chosen, use the toolbar at the top of the ViewDirect screen. Click on the printer symbol and when the print box comes up click on the current section choice. All of the pages for the index should print.

**Downloading**

You may download copies of reports in various formats, depending on the file format in which the file is written (PDF, HTML, etc.).

1. Select the report.
2. Once it appears in the viewing window, click the download icon.
3. Select the “Pages” you want to download.

4. “Specify the data that you want to download”:

   “All Data”
   - Next to “Download As”, change the file type to the file type you want.
   - Data options are JPG, BMP, PNG, PDF, HTML or Text depending on the type of file you have open.
   - Click the download icon again.

   “Selected Data”
   - Note: If you would like to download into Excel format you have this option in EnterpriseFolders.

5. Will give you additional information.
Export to Excel

1. In the viewing window, click the Create Table icon. The following tool bar is now displayed:

![Tool bar image]

You must select this icon to exit the excel view.

2. Highlight the area you would like to see in Excel by clicking and dragging your mouse over the data. A red box will highlight your area you have selected.

3. Now select the icon to create your data definition table.

Edit Table

- You can merge or split columns after selecting the columns you wish to work with.

- The icon allows you to edit the name of the columns in your table.

- To edit the settings for the data in your table select the column and then select .

- sets the constraints and is used to decide which reports and versions this table can be applied to.

View/Download Table

- After you have selected a data definition to view your table in excel select the icon.

- Hint: If you wish to only view only the data definition table and not the entire page select “From” and enter 1 to 2 (selecting “Current Section” will give you the entire page). See below:
View in Excel - Windows Int...

https://urbddr.admin.uillinois.edu:8443/ddrint/servlet/

Specify the part of the document from which you will extract data. The extracted data is displayed in Excel.

Pages:  
- All
- Current section
- Current page

From: 1 To: 2

Internet 100%
Saving and Exiting Excel

- Selecting the icon saves your table template to be used over again if you choose.
- The icon allows you to exit the system.

What If I Can't Access ViewDirect?

If you have problems logging into ViewDirect, please call the AITS Service Desk at:
UIC: (312) 996-4806
UIS & Urbana: (217) 333-3102
Email: helpdesk2@uillinois.edu.