





ViewDirect Job Aid

This job aid provides information about using ViewDirect. The following sections are in this job aid:



Quick Instructions: Accessing Reports with ViewDirect	1
Navigating ViewDirect	2
The Left Pane	3
The Right Pane	4
Toolbar Icons	5
Tips	6
General	6
Searching	6
Display/Settings	7
Printing	7
Downloading	7
What If I Can't Access ViewDirect?	9

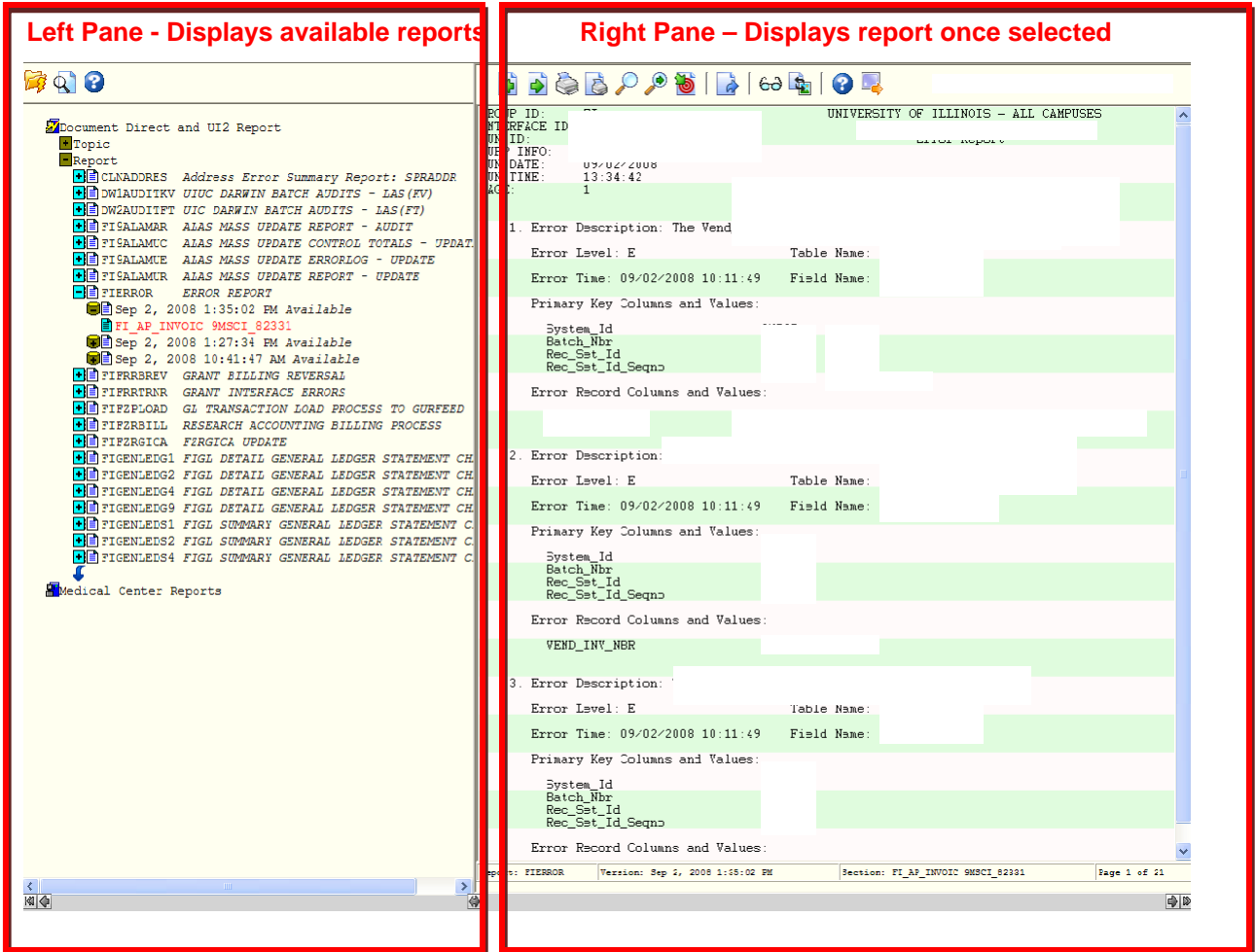
Quick Instructions: Accessing Reports with ViewDirect

1. Go to the following url: <https://docdirectpweb.admin.uillinois.edu/ddrint/servlet/ddrint>
2. Click on  DocumentDirect & UI2 Reports.
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.  Report. You will see the list of reports available to your ID. Note: every time you open a folder or document, the name of that folder or document will be highlighted in red.
6. Next to each report you will see two icons:
 -  Clicking on the plus sign will display all versions of the report
 -  Clicking on the document will automatically display the most recent version of the report.
7. Select the report you would like to view.
8. 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 by clicking on the  or  icon, 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.

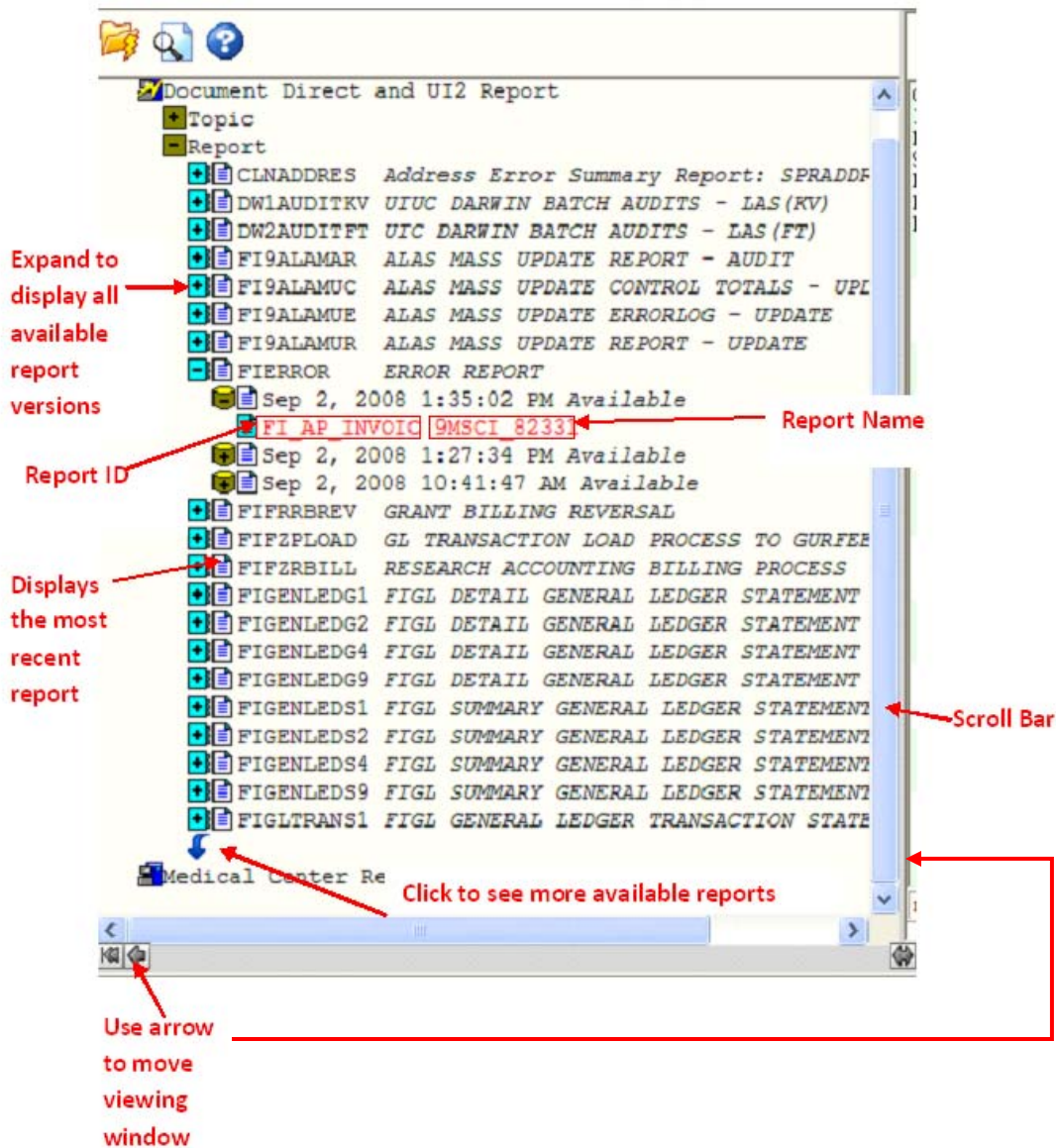


The screenshot displays the ViewDirect interface, divided into two main panes:

- Left Pane - Displays available reports:** This pane shows a hierarchical tree structure of reports. The top-level report is "Document Direct and UI2 Report". Underneath, there are several sub-reports, including "Report" and "Medical Center: Reports". The "Report" sub-report is expanded, showing a list of reports such as "CLNADDDRES Address Error Summary Report: SPRADDR", "DW1AUDITRV UIUC DARWIN BATCH AUDITS - LAS (KV)", "DW2AUDITPT UIUC DARWIN BATCH AUDITS - LAS (FT)", "FISALAMAR ALAS MASS UPDATE REPORT - AUDIT", "FISALAMUC ALAS MASS UPDATE CONTROL TOTALS - UPDAT", "FISALAMUC ALAS MASS UPDATE ERRORLOG - UPDATE", "FISALAMUR ALAS MASS UPDATE REPORT - UPDATE", "PIERROR ERROR REPORT", and several "Sep 2, 2008" reports. The "PIERROR" report is selected, indicated by a blue arrow.
- Right Pane - Displays report once selected:** This pane displays the details of the selected "PIERROR" report. The report title is "PIERROR" and the section is "FI_AP_INVOIC 9MSCI 82331". The report content is organized into sections for each error record. The first error record has the following details:
 - 1. Error Description: The Vend
 - Error Level: E
 - Table Name:
 - Error Time: 09/02/2008 10:11:49
 - Field Name:
 - Primary Key Columns and Values:
 - System_Id
 - Batch_Nbr
 - Rec_Set_Id
 - Rec_Set_Id_Seqno
 - Error Record Columns and Values:
 - VEND_INV_NBRThe second and third error records follow a similar structure but with different error descriptions and values.

The Left Pane

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



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):

The screenshot shows a report viewer window with a navigation toolbar at the top. The report content is displayed in a scrollable area. The report header includes the following information:

- GROUP ID: **
- INTERFACE ID: Test
- RUN ID: Error Report
- SUPP INFO:
- RUN DATE: 09/02/2008
- RUN TIME: 13:34:42
- PAGE: 1

The report body contains three error entries, each with the following structure:

- 1. Error Description:
 - Error Level: E
 - Error Time: 09/02/2008 10:11:49
 - Table Name:
 - Field Name:
 - Primary Key Columns and Values:
 - System_Id
 - Batch_Nbr
 - Rec_Set_Id
 - Rec_Set_Id_Seqno
 - Error Record Columns and Values:
- 2. Error Description: -
 - Error Level: E
 - Error Time: 09/02/2008 10:11:49
 - Table Name:
 - Field Name:
 - Primary Key Columns and Values:
 - System_Id
 - Batch_Nbr
 - Rec_Set_Id
 - Rec_Set_Id_Seqno
 - Error Record Columns and Values:
 - VEND_INV_NBR
- 3. Error Description:
 - Error Level: E
 - Error Time: 09/02/2008 10:11:49
 - Table Name:
 - Field Name:
 - Primary Key Columns and Values:
 - System_Id
 - Batch_Nbr
 - Rec_Set_Id
 - Rec_Set_Id_Seqno
 - Error Record Columns and Values:

The footer of the report displays the following information:

- Report: FIERROR
- Version: Sep 2, 2008 1:35:02 PM
- Section: FI_AP_INVOIC SMSCL_82331
- Page 1 of 21

Annotations in red text and arrows point to the following elements:

- Navigation Tool Bar**: Points to the toolbar at the top of the report viewer.
- Page # and total # of pages in report**: Points to the footer text "Page 1 of 21".
- Report ID**: Points to the "Report: FIERROR" field.
- Report Version**: Points to the "Version: Sep 2, 2008 1:35:02 PM" field.
- Report Section**: Points to the "Section: FI_AP_INVOIC SMSCL_82331" field.
- Use arrow to move viewing window**: Points to the scroll bar on the right side of the report content area.

Toolbar Icons

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

Left Pane



Right Pane (BANNER, HTML report view)



-OR-

Right Pane (PDF, Text report view)




Icon	Label	Action
	Open	Opens the report which you have selected.
	Locate	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).
	Help	Displays online help for ViewDirect
	Previous Page	Scrolls to the next page in the report
	Next Page	Scrolls to the previous page in the report
	Print	Allows you to print the entire report
	Print Current page	Prints only the page of the report displaying
	Search	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.
	Search Again	See above; locates additional text matches within the report.
	Go To	Allows you to go to a specific page of the report.
	Download	Downloads the report to your computer or other specified location
	Change View	Increase or decrease the report image.
	Format	Allows you to change the format of the report (i.e. PDF, HTML, etc.)
	Help	Displays online help for ViewDirect
	Logoff	Logs out of ViewDirect. Note that ViewDirect times out after 1 hour of inactivity.

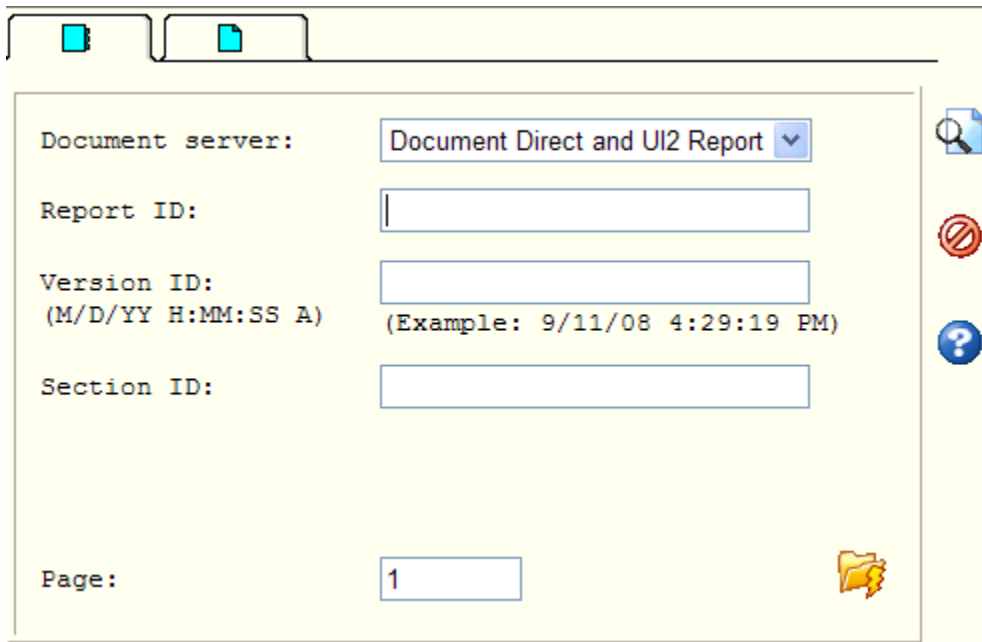
Tips

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.).

Searching

- **For a report:** Use the Locate icon  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



The screenshot shows a search popup window with a yellow background. At the top, there are two tabs, each with a blue document icon. The main area contains the following fields and controls:

- Document server:** A dropdown menu with the text "Document Direct and UI2 Report" and a downward arrow.
- Report ID:** A text input field.
- Version ID:** A text input field with the label "(M/D/YY H:MM:SS A)" below it. An example "(Example: 9/11/08 4:29:19 PM)" is shown to the right.
- Section ID:** A text input field.
- Page:** A text input field with the number "1" inside.

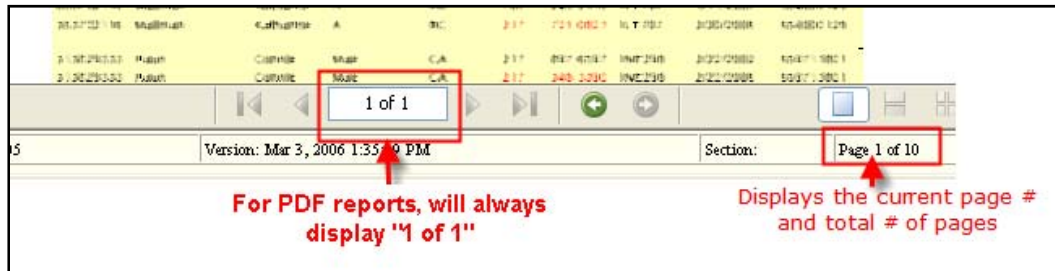
On the right side of the popup, there are three icons: a blue magnifying glass (Locate icon), a red circle with a diagonal slash (Prohibit icon), and a blue circle with a white question mark (Help icon). A yellow folder icon is located at the bottom right of the popup.



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.




- 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.

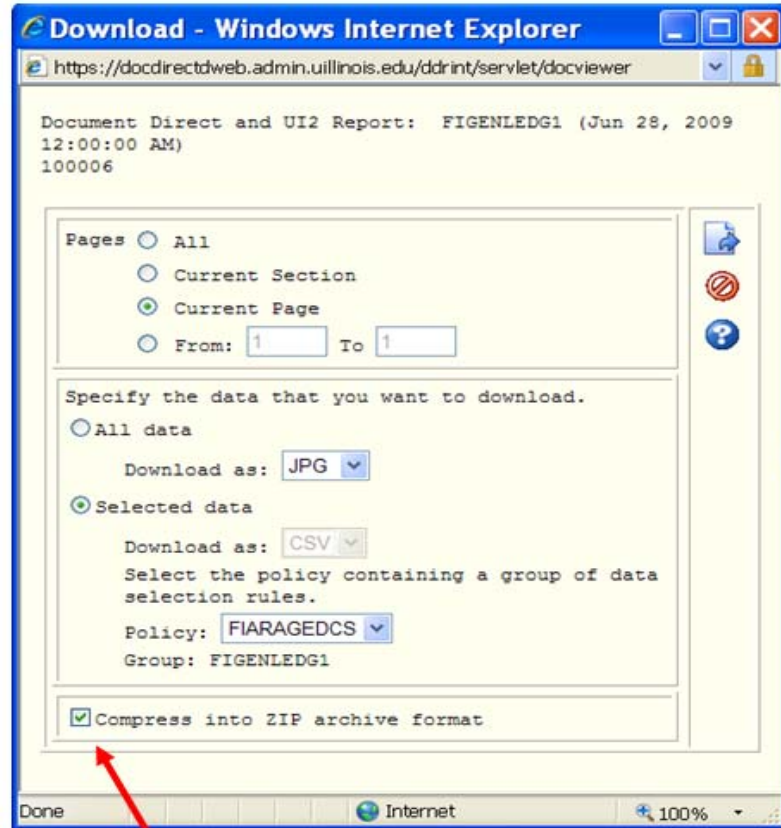
Printing

- 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 and 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 indexes 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 section 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 section 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 



You have the option to save in a zipped format
Check the box next to "Compress into ZIP archive format"


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.

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.