Virginia Department of Accounts

Financial Accountability. Reporting Excellence.

https:\\reportline.doa.virginia.gov

Reportline User Manual

—Rev. October 18, 2011—

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Reportline Overview

Introduction

The Department of Accounts (DOA) has developed a web-based system to provide access to digital reports generated by the accounting and financial management systems operated by DOA and for which Statewide users key data transactions into.

Authorized users may access **Reportline** using the internet at

https://reportline.doa.virginia.gov

Reportline is user-friendly and requires little intervention from outside resources. However, DOA realizes there may be some functions individuals may need assistance with and it has developed this administrative manual to guide system users.

REPORTLINE Features

Reportline provides Commonwealth of Virginia agency personnel, as well as Treasurer and Clerk of the Court locality personnel, with the means to:

- View reports **not printed remotely onsite** for **3 years** past the report run date.
- Download multiple reports simultaneously to view, print, and/or store.
- Store electronic versions of these reports on an agency-based server or individual personal computer.
- Perform searches for specific verbiage found in the electronic reports.
- Maintain agency user access internally.
- View Help pages associated with each **Reportline** online screen.

Database Security

State-of-the-art security features are provided to maintain confidentiality of report information.

- **Application Security**—requires a Logon ID and password for system access. Individuals will be required to keep this information confidential to provide the utmost security to Commonwealth data.

- **Secure Socket Layer (SSL)—**uses a 128-bit encryption routine to protect the data as it travels back and forth over the Internet.

- **Encrypted File System (EFS)—**is an operating system feature that protects sensitive data and prevents unauthorized access to the file directory.

Continued on next page

Reportline Overview, Continued

Access Requirements

- Browser must be enabled for Java Script.
- Browser must be enabled for Cookies.
- Browser must be enabled for Secure Socket Layer (SSL) Security (128-bit version).
- If connecting to the site from behind a firewall or proxy server, it must allow SSL (port 443) communication.
- ***Internet Explorer*** browser, version 4.0 or higher.
- Designed to be viewed at a screen resolution of 800 by 600 or greater, with a minimum of 256 colors.
- Connection speed of 56k modem (or higher) is recommended.

Security Enhancements

Reportline's enhanced security protects sensitive information and to conform to VITA/NG security regulations. Enhanced security includes the following:

1. Requires a password phrase when making a temporary password request.
2. Passwords are case sensitive.
3. Passwords have new criteria.
4. Ability for a user to reset his password instead of requesting a temporary password—AFTER 24 HOURS.
5. Requires answering *Challenge Questions* for certain changes.

Reportline User Security

Security Levels

Reportline has four levels of application security.

- *Application Administrator*—DOA Database Administration personnel who establish Systems Administrator security.
- *Systems Administrator*—DOA application specific (i.e., CARS, CIPPS, FAACS) personnel who establish line agency Reportline Security Officer security.
- *Reportline Security Officer*—Line agency security officer who establishes Individual User security.

➢ **Individual User—Line agency personnel who utilizes Reportline to access electronic reports. Reportline Users ARE able to change passwords within 24 hours to maintain agency and locality report access. Details are covered below in the following topics:**
❶ How to Update an Expired Password
❷ Forgot Your Password

Locality User Setup & Request Form

NOTE
Treasurer and Clerk of the Court personnel are established with individual user security for CARS report access by the Department of Accounts.

Locality personnel use the **REPORTLINE LOCALITY REQUEST FORM FOR CARS MONTHLY REPORT ACCESS** located at the DOA web site as follows:

http://www.doa.virginia.gov/Admin_Services/Reportline/ReportlineLocalityRequestForm.pdf

---

Agency User Setup

Your Agency Reportline Security Officer sets up your individual security so you can access Reportline.

Agency User Request Form

To access specific reports on Reportline, your Agency Reportline Security Officer will have you complete the Reportline Request Form. This form is located on DOA's Reportline website for use under the REPORTLINE link on the right-hand side of the MAIN PAGE . Its web location and a sample follow. **Return the form to your agency's Reportline Security Officer who adds you directly into the Reportline system**.

Once you are added, your agency's Reportline Security Officer will notify you of your Log-on ID and Password.

Reportline User Security, Continued

Agency User Request Form Sample

The agency user **Reportline Request Form** is located as follows:
http://www.doa.virginia.gov/Admin_Services/Reportline/ReportlineRequestForm.pdf

DOA
Virginia Department of Accounts
Financial Accountability. Reporting Excellence.

Reportline Request Form (Agency Use)

Date	/ /		**User Type** *(check one)*	❑ Agency User ❑ Agency Security Officer
Logon ID *(5 to 8-Character/Alpha-Numeric)*				
Your Agency Number			**Action** *(check one)*	❑ New ❑ Change ❑ Delete

Name				
	First	*Middle*	*Last*	

Signature		
E-mail Address		
Telephone		

Approved Agencies—*List individual agency numbers*

_____

_____

—Reportline Access—

Report Families: BENEFITS, CARS, CIPPS, FAACS, HEALTHCARE, LEAVE, VRS

Report Family *(See List Above)*	**Level of Security** *(Choose only one)*	**List Reports Here For Security Levels C or D**
_____	❑ **A.** No reports for system ❑ **B.** All reports for system ❑ **C.** **ONLY** listed reports for system ***Use next column to list reports*** ❑ **D.** All reports for system **EXCEPT** listed ***Use next column to list reports***	_____ _____ _____
_____	❑ **A.** No reports for system ❑ **B.** All reports for system ❑ **C.** **ONLY** listed reports for system ***Use next column to list reports*** ❑ **D.** All reports for system **EXCEPT** listed ***Use next column to list reports***	_____ _____ _____

Authorized by: _____ *Signature* _____ *Date*

Entered by: _____ *Signature* _____ *Date*

Continuation Page Attached ? ____ **No** ____ **Yes**

ReportlineRequestForm.doc Revised 1/28/11

Getting Started: How to Create Your New Password and Challenge Question Answers

Introduction

Your Password needs to conform to VITA/NG security standards.

To do this, perform the following:

① Request a TEMPORARY PASSWORD be sent to your E-mail box, and

② Use this TEMPORARY PASSWORD to log in to create a PERMANENT PASSWORD and answers to two CHALLENGE QUESTIONS.

This topic guides you through the Reportline screens for this procedure.

Set Up Temporary AND Permanent Passwords

Although you have to have been activated with security as a Reportline User, it is necessary to perform a couple of new SECURITY SETUPS.

In turn, you will receive a system-generated E-mail with a **TEMPORARY PASSWORD**. Use this temporary password to log in and create a **PERMANENT PASSWORD**.

Web Address to Log On

https:\\reportline.doa.virginia.gov

DOA Home Page to Log On

From the DOA Home Page, under LINKS click **REPORTLINE**. Then, click REPORTLINE WEB SITE button.

Continued on next page

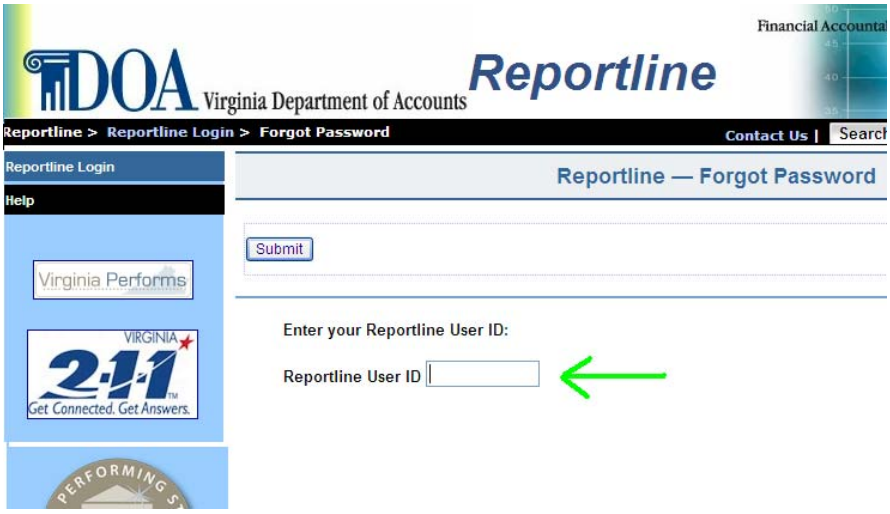
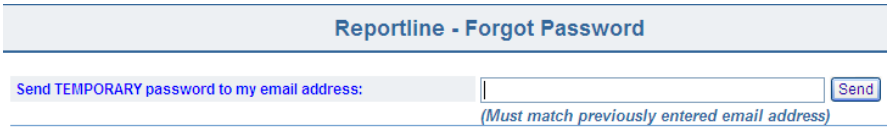
Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

Request Your Temporary Password

Perform the following steps to receive a **TEMPORARY** password. To do this, you will NOT log in; INSTEAD, you will click **FORGOT PASSWORD**.

Step	Action
1	Access the Reportline website (see above). At the Login screen, you can set a Reportline DESKTOP ICON to log on for future sessions without going through the DOA web site. To do this, right click your mouse; select SET AS DESKTOP ITEM or CREATE SHORTCUT.
2	You have to receive a **TEMPORARY** password from the Reportline system E-mailed so you can create your **PERMANENT** password. **IMPORTANT** □ **Do NOT enter data in USER ID or PASSWORD fields.** □ **Instead, click FORGOT PASSWORD.**

Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

Step	Action
3	At the **FORGOT PASSWORD** screen, enter your **USER ID** and click **SUBMIT**. 
4	Next, enter your **E-Mail Address;** click **SEND**. 

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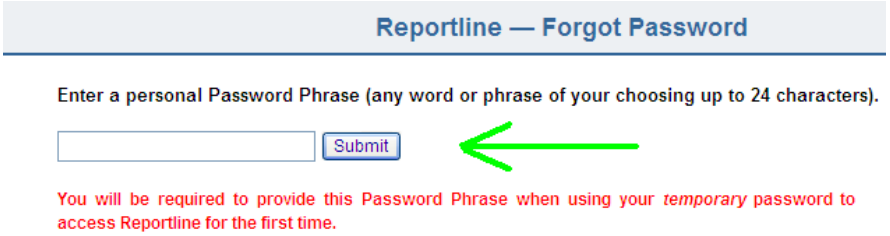
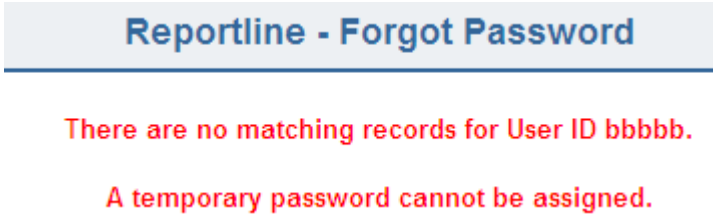
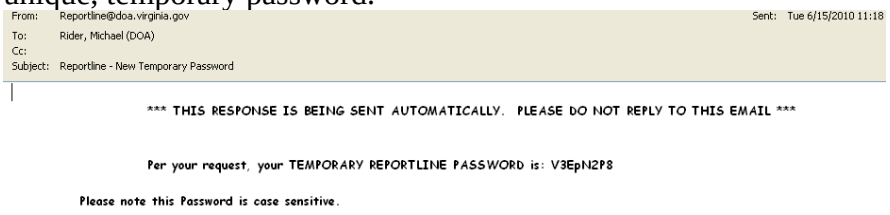
Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

Step	Action
5	Enter a **TEMPORARY PASSWORD PHRASE** (no special characters required). **Remember this phrase or make a note because you need it later.** 
6	**NOTE** **Reportline uses the E-mail address in your Reportline security record. If you do NOT receive an E-mail message with the temporary password, have your REPORTLINE AGENCY SECURITY OFFICER verify your E-mail address for accuracy in your security record.** **The following message is for a User ID not in Reportline. See your REPORTLINE AGENCY SECURITY OFFICER.** 
7	The system-generated, E-mail is sent to your In-Box and contains a unique, temporary password. 

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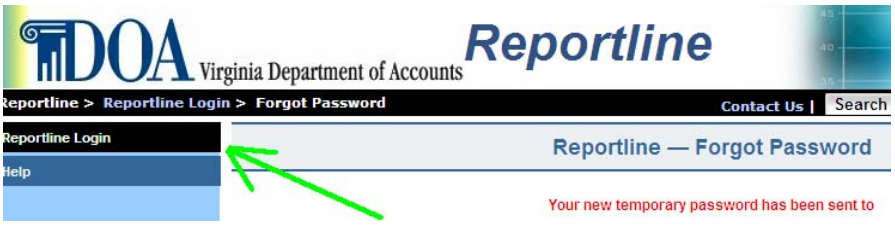
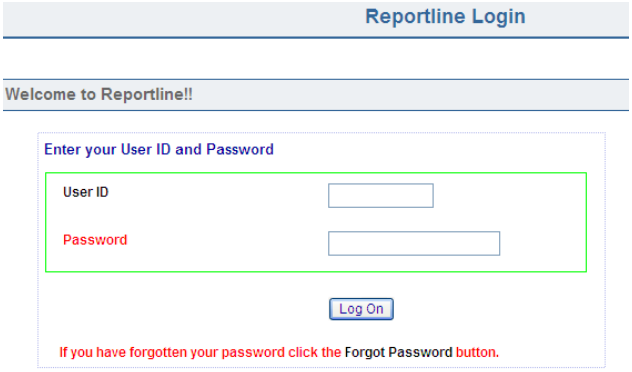
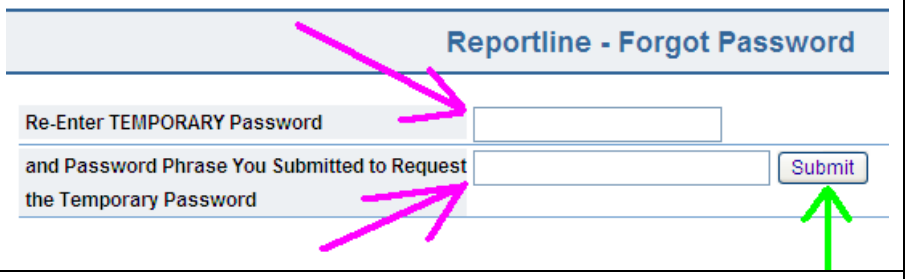
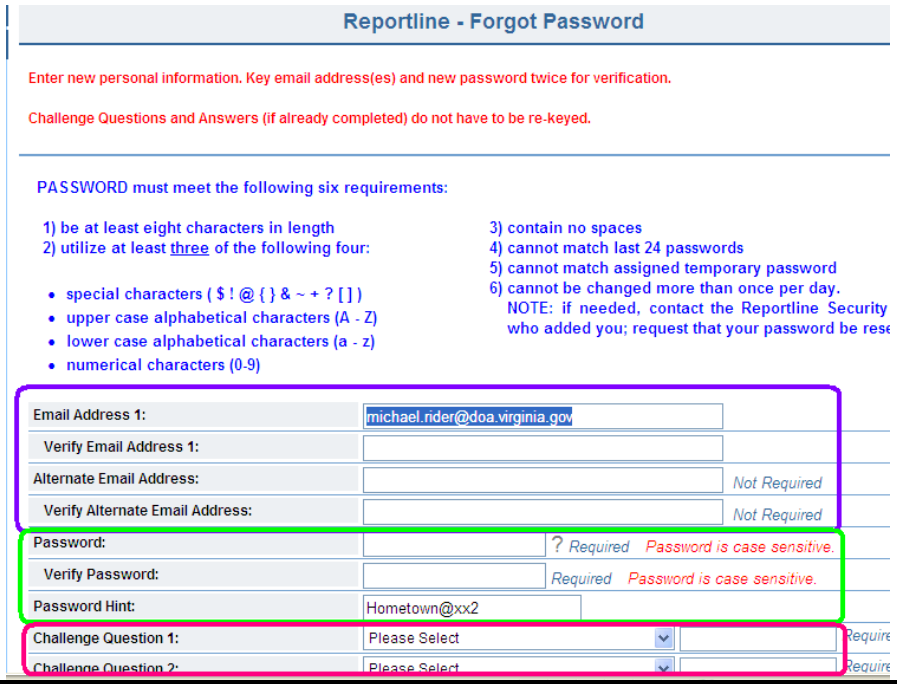
Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

8	Once you receive the temporary password and you have NOT timed out of Reportline, you can remain at this Reportline screen and click REPORTLINE LOGON to re-enter Reportline. Otherwise, you need to access the Reportline logon screen. 
9	**Note** You can **COPY** the temporary password from your E-mail and **PASTE** it directly into the Password field at the Reportline Login screen. This helps prevent making a keying error. At the Reportline Login screen, enter **USER ID** and the **TEMPORARY PASSWORD** which is case sensitive. It has to be entered exactly as it appears in the E-mail.  Click **Log On**.

Continued on next page

Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

10	At the following screen— a) Re-enter the TEMPORARY PASSWORD E-mailed to you. b) Enter the Password Phrase you keyed earlier when you requested the temporary password. c) Click **SUBMIT**. 
11	The next setup screen is organized into three areas as follows: **1) E-mail Address verification** **2) Password** **3) Challenge Questions** 

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Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

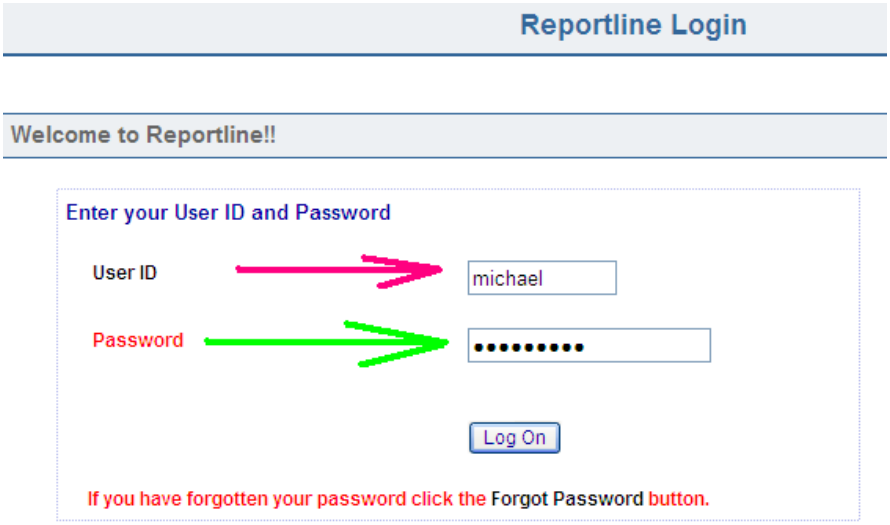
12	**E-Mail Verfication** Your E-mail address appears in the first field. If this entry is not correct, delete it and key your correct E-mail address. In **VERIFY EMAIL ADDRESS 1** field, rekey your E-mail address.
12	**Password** For your convenience, the **RULES** for a Reportline Password are provided on this screen. **First, familiarize yourself with the six requirements.** Highlights **Password is case sensitive.** **Password cannot be changed BY YOU more than once per 24 hours (Rule # 6) unless it is reset by the Agency Security Officer or a DOA Administrator.** **Password expires every 90 days.** Enter a password. Verify the password by keying it again in the VERIFY PASSWORD field. Key a PASSWORD HINT.
13	**Challenge Questions** Use the drop-down boxes to select both Challenge Questions and key your response beside each question. **Responses are case sensitive. Please remember this.**
14	Review your entries for— E-mail Password Challenge Questions Click **SUBMIT.**
15	The **PASSWORD REQUIREMENTS STATUS** screen appears and shows what Password Requirements you meet (OK) and what requirements you did not (FAILED).

Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

16	If you did **NOT** meet some requirements, correct your entry in the field directly on the PASSWORD REQUIREMENTS STATUS screen. Click **SUBMIT** when you have finished.
17	**When you meet all password requirements, you do NOT see a Password Requirements Status screen. Click SUBMIT.**
18	The following screen asks you to CONTINUE TO REPORTLINE! **Reportline Password Updated** Your Password has been successfully updated! Please continue to the Reportline Application: Continue to Reportline!
19	The Broadcast Screen appears. Click MAIN MENU to continue using Reportline. **Broadcast Messages** —WELCOME TO REPORTLINE— CARS—[Valerie Dunmars-Hurdle] Valerie.Dunmars@doa.virginia.gov / (804) 371-8383 FAACS & LAS—Bobby. Eddleton@doa.virginia.gov / (804) 225-2257 CIPPS & Leave—Cathy.McGill@doa.virginia.gov / (804) 371-7800 Courts & Treasurers CARS Reports—Donna.Rabender@doa.virginia.gov / (804) 225-3063 DOA Contact—Michael.Rider@doa.virginia.gov / (804) 225-3051

Continued on next page

Getting Started: How to Create Your New Password and Challenge Question Answers, Continued

20	Instead, Click LOG ON button on the left-hand menu. This takes you to the login screen. Remember to enter your NEW password this time. Dots appear to guard password security; key it carefully. Click LOG ON. 

How to Update an Expired Password

Password Expires Every 90 Days

Your password is valid for 90 days. When it expires, the system generates the screen so you can enter a new password, along with a password hint.

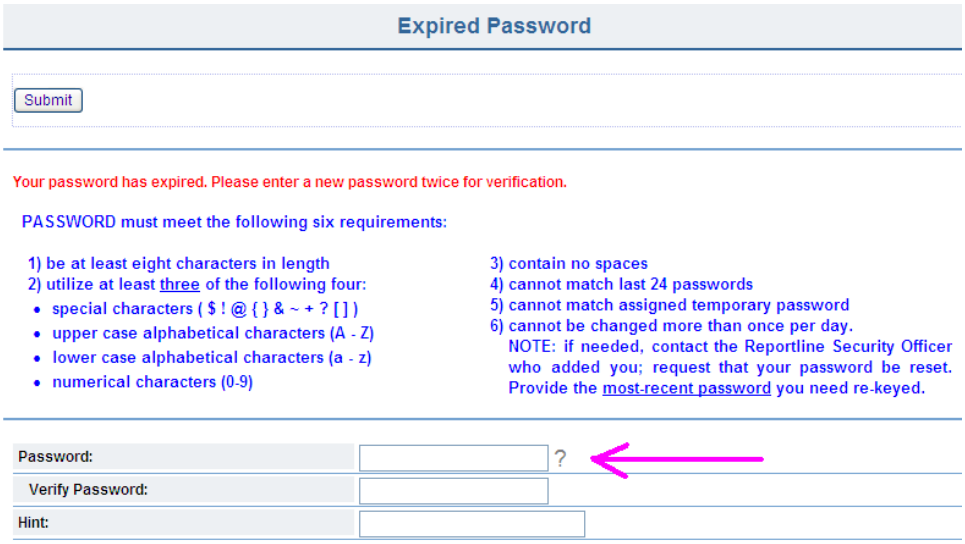
Password Expires if Reset by the Security Officer

If you forget your password and request a Reportline Security Officer to change your password, you receive an expired password message the first time you use the reset password. This is designed so **you** create a new password *immediately* to begin using Reportline.

Screen

The EXPIRED PASSWORD screen lists the Password rules to establish your password which has six (6) requirements.

Once you complete the three fields, click **SUBMIT** in the upper, left-hand corner.



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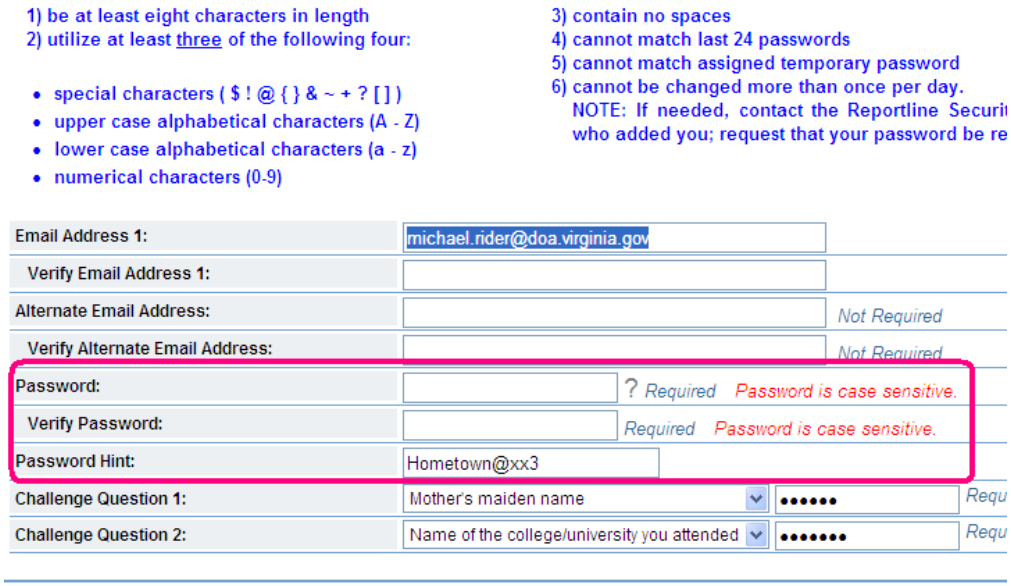
How to Update an Expired Password, Continued

Password Is Correct or Not Correct

The system lets you know if you succeeded or not to create a permanent password to satisfy the six (6) requirements.

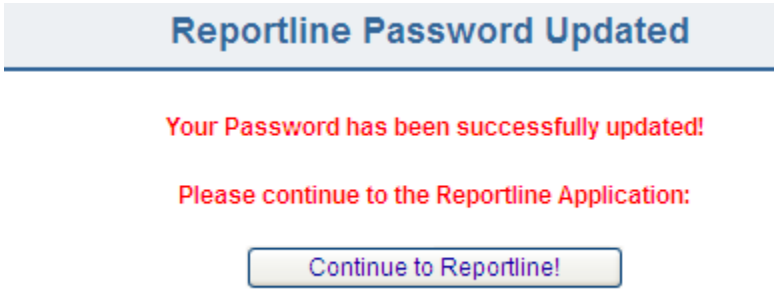
PASSWORD and VERIFY PASSWORD fields are blank should you need to try it again.

If you need to try again, enter the password and verify it. Click SUBMIT again.



Password Updated

The following screen confirms you have a correct password and you are ready to resume in Reportline.



Continued on next page

How to Update an Expired Password, Continued

Broadcast Screen Appears Next

The Broadcast Screen appears. Click MAIN MENU to continue using Reportline.

Broadcast Messages

—WELCOME TO REPORTLINE—

CARS—[Valerie Dunmars-Hurdle] Valerie.Dunmars@doa.virginia.gov / (804) 371-8383
FAACS & LAS—Bobby. Eddleton@doa.virginia.gov / (804) 225-2257
CIPPS & Leave—Cathy.McGill@doa.virginia.gov / (804) 371-7800
Courts & Treasurers CARS Reports—Donna.Rabender@doa.virginia.gov / (804) 225-3063
DOA Contact—Michael.Rider@doa.virginia.gov / (804) 225-3051

Accessing Reportline: AFTER Establishing Your Permanent Password

Web Address

https://reportline.doa.virginia.gov

From the DOA Home Page

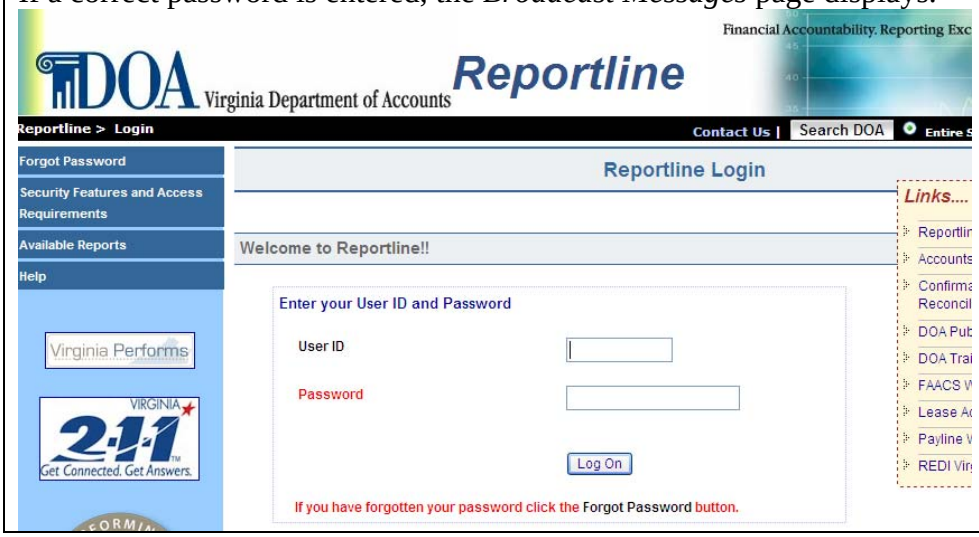
If you use the Department of Accounts Internet Home Page, click the **REPORTLINE** button located under ***LINKS…***.

Logon

Perform the following steps to logon.

Step	Action
1	Access the Reportline web site: **https://reportline.doa.virginia.gov** **This will take you to the Reportline Home Page.** At this point, you can set a Reportline DESKTOP ICON to log in for future sessions without going through the DOA web site. To do this—at this Logon screen, right click your mouse; select SET AS DESKTOP ITEM.
	Enter Logon ID (7 to 9 Character/Alpha-Numeric).
2	Enter your password.
3	Click the **Logon** button.

If a correct password is entered, the *Broadcast Messages* page displays.



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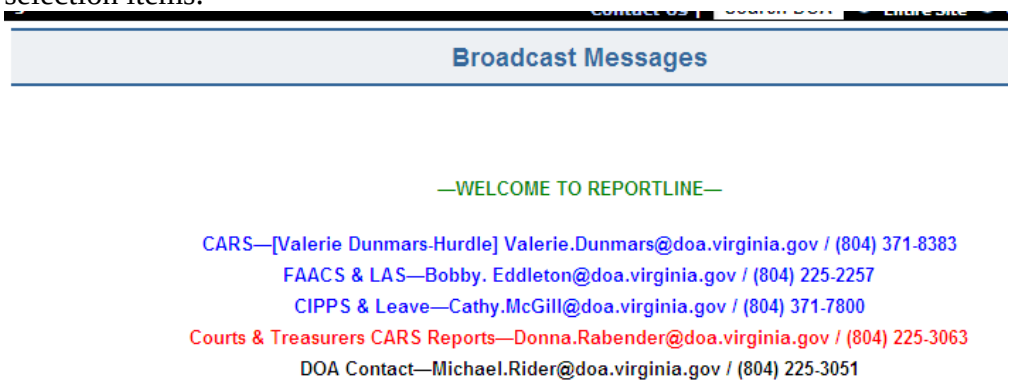
Accessing Reportline, Continued

Navigation

Navigation buttons located in the left-hand margin of the page AND the upper, right-hand corner of the screen, link you to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Access Files	Links you to the Access Files screen to obtain your DOA-generated systems' reports.
Broadcast Messages	Links you to the Broadcast Messages screen.
Available Reports	Opens a new window which shows all available reports in the Reportline application. Some reports will not be available to all users due to security requirements. Also, some reports may not be turned on and you have to request that a specific report is turned on. To do this, contact your Reportline Report Family Coordinator listed at the Broadcast screen when you log in.
Help	Opens a new window containing information about the Reportline - Login - Help page.
Contact Us	(Located in the top, right corner of the screen) Links to the Contact Us page and allows you to submit questions or information to the DOA Reportline staff.
Log Off	Allows you to exit the system.

You are linked to the **Broadcast Messages** page for messages and other menu selection items.



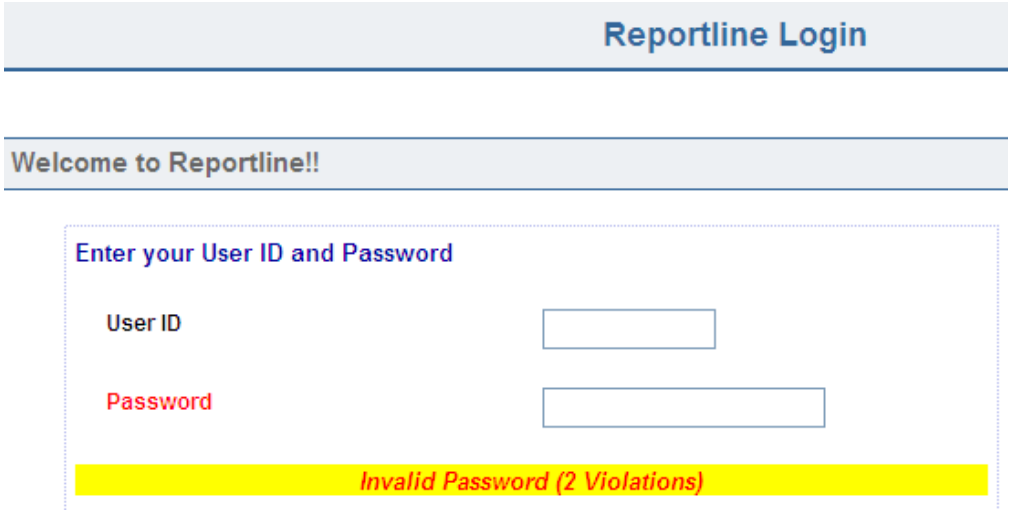
Accessing Reportline, Continued

Invalid Log On

When you enter an invalid Logon ID, you will see the error message in red ink:

Suspended Account

After 5 (five) failed logon attempts, the following message is displayed:



Violations are cleared in one of three ways—

1) During overnight computer processing
2) For AGENCY USERS, during the day by your Agency Reportline Security Officer
3) For LOCALITY USERS, during the day by a DOA Systems Administrator

To contact DOA, use the **Contact Us** button in the upper, right-hand corner of the screen to request the violations be cleared.

Continued on next page

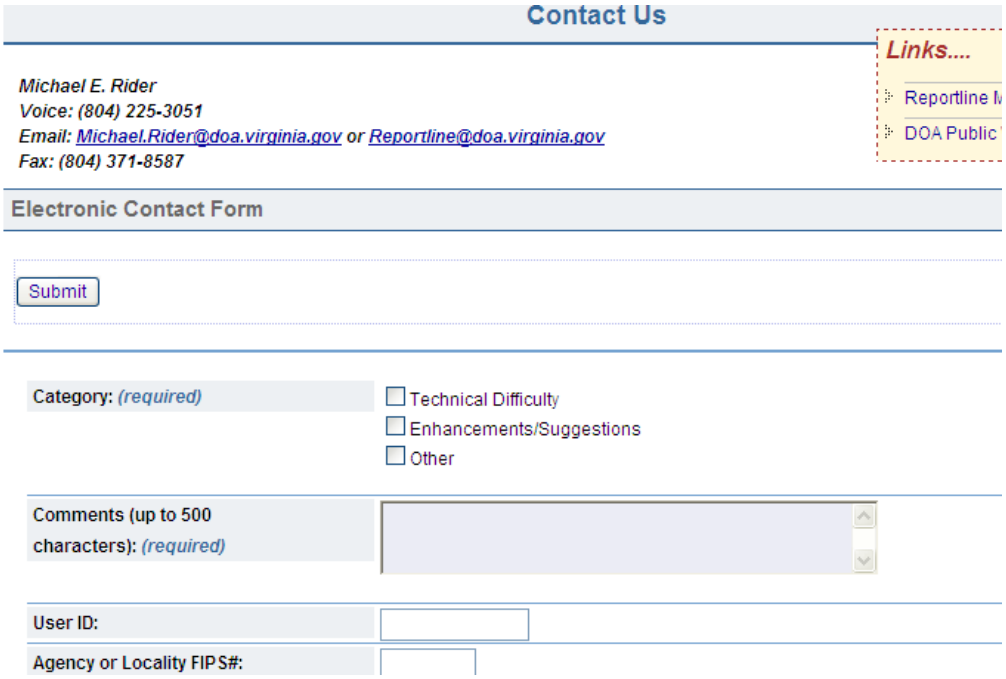
Accessing Reportline: AFTER Establishing Your Permanent Password, Continued

Contact Us Screen

Your **CONTACT US** button—located in the upper, right-hand corner of the Reportline system screens—generates an E-mail directly to DOA.

Use this button during your workday when your Agency Reportline Security Officer is not available and for a DOA Administrator to clear your five, logon attempt violations during the business day.

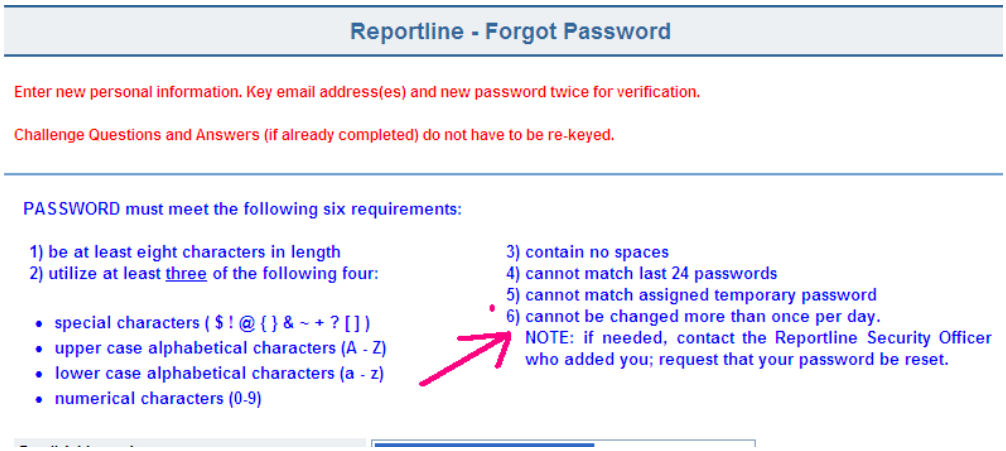
You can use the CONTACT US button screen for all DOA-related, Reportline questions you encounter.



Forgot Your Password?

Password Change Rule

You can change your Password within 24 hours of it having been just added or changed by your Agency Reportline Security Officer or a DOA Reportline Administrator.



In Reportline, when you forget your password, do the following—

1. Contact your REPORTLINE AGENCY SECURITY OFFICER and ask to reset the password.

2. **Agency Security Officers** can contact a DOA Reportline Administrator to reset the password to a new one as well.

3. After you re-log into Reportline with the password the Security Officer has used to reset you, you will get a message indicating that you have to create a new password. You will be prompted to do this immediately in order to continue using Reportline because the system is programmed to give you an Expired Password error message.

4. To change the password after you are reactivated by a security officer, you can use one of methods **shown as separate topics in this manual** as follows:

   ① FORGOT PASSWORD (procedures follow directly below)
   ② HOW TO UPDATE AN EXPIRED PASSWORD (procedures shown in a separate topic previously)

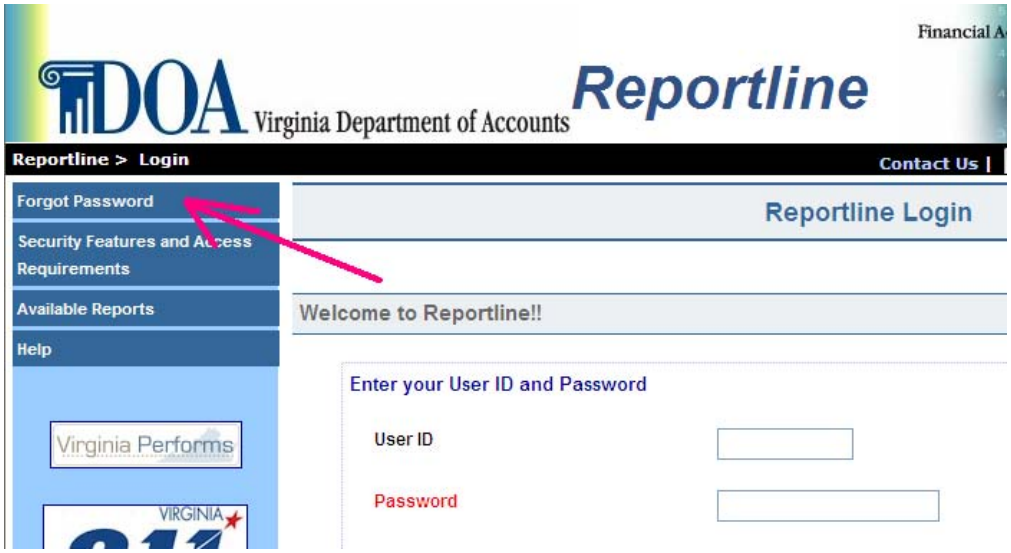
Continued on next page

Forgot Your Password?, Continued

Forgot Password Button After 24 Hours Have Passed

If you forget your password AFTER 24 HOURS of it being established, go to the Login screen. You can also use this screen if your password has **expired**.

Click **Forgot Password**. You will go to the *Forgot Password* page.



At the FORGOT PASSWORD screen, enter your logon ID and press SUBMIT.

Continued on next page

Forgot Your Password?, Continued

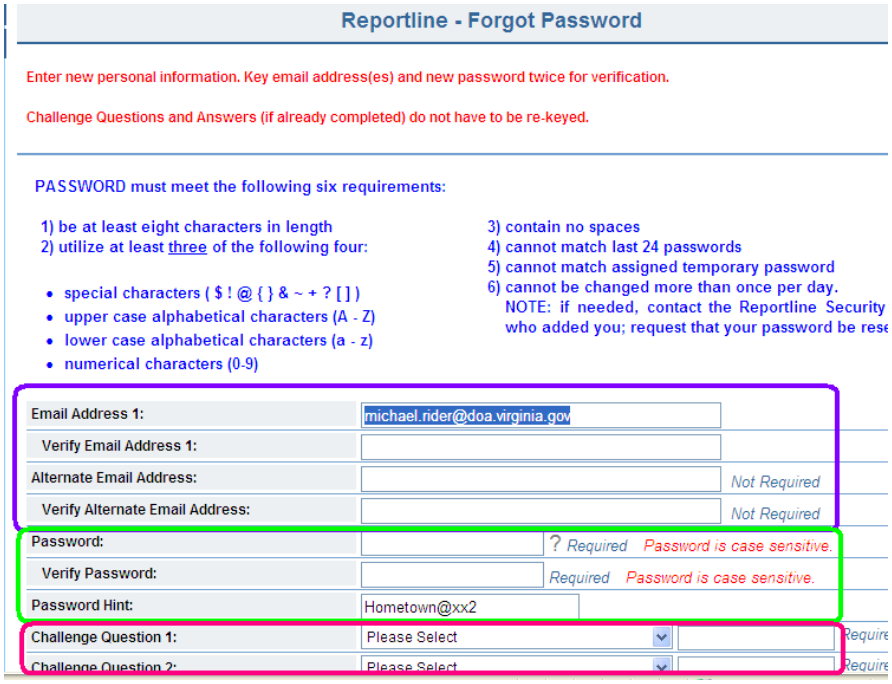
Submit Challenge Questions

You are asked to submit answers to your previously-stored CHALLENGE QUESTIONS.

When you complete keying, click SUBMIT CHALLENGE ANSWERS.

Create New Password

Here, create a **NEW PASSWORD**.

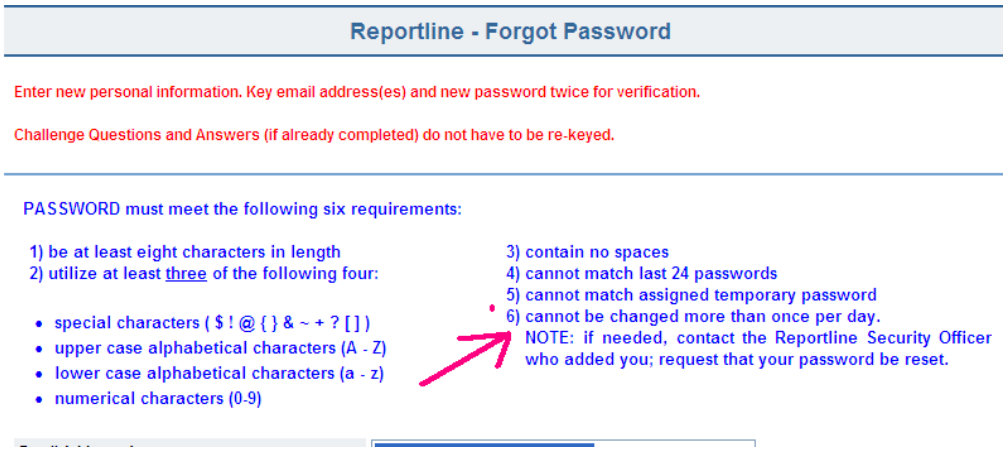


Continued on next page

Forgot Your Password?, Continued

Error Message Appears If Less Than 24 Hours

If you forget your password in less than 24 hours, you get the following error message highlighted that indicates FAIL beside Item # 6. You cannot proceed with the system. (However, see below…there's a way around this within the 24-hour period.)



To continue using Reportline within 24 hours of having just created a new Password, perform the following to have your Password reset.

If you are …	Then contact your …
Agency User	Agency Reportline Security Officer
Locality User	DOA Reportline Locality Coordinator
Reportline Security Officer	DOA Reportline System Administrator

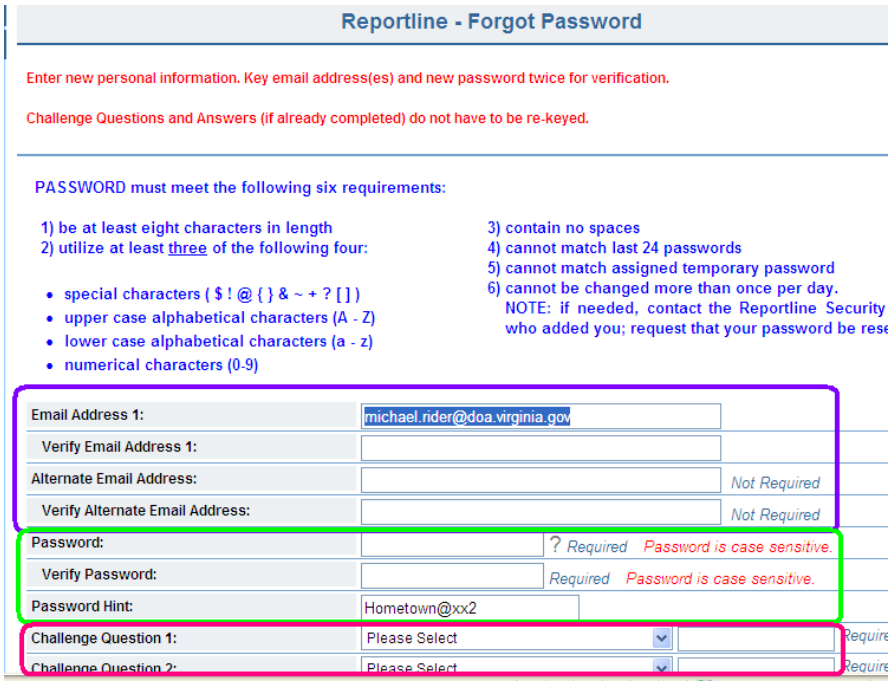
Continued on next page

Forgot Your Password?, Continued

If No 24-Hour Error Message

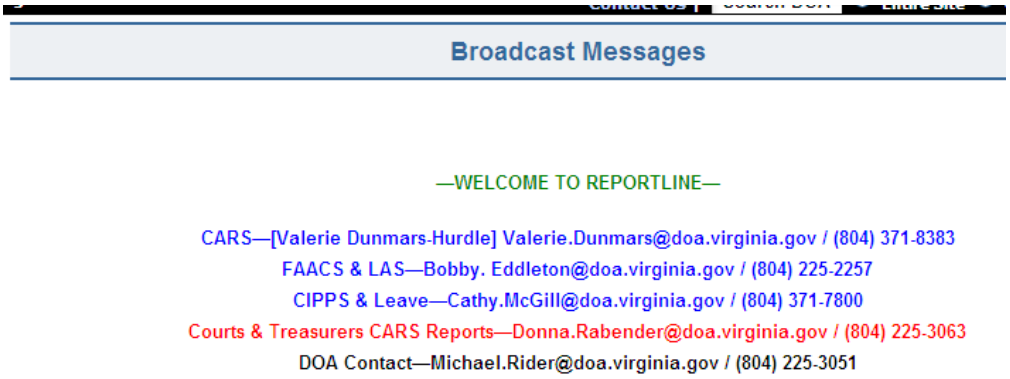
Proceed to establish a new password. You go through the same process as you did when you created your permanent password to use Reportline.

Click SUBMIT when all requirements are met.



Broadcast Messages

Broadcast Screen



The *Broadcast Messages* screen welcomes you to **Reportline**. It is used to communicate messages both globally and individually to the **Reportline** user population.

In the center of the screen is a global message intended for all **Reportline** users.

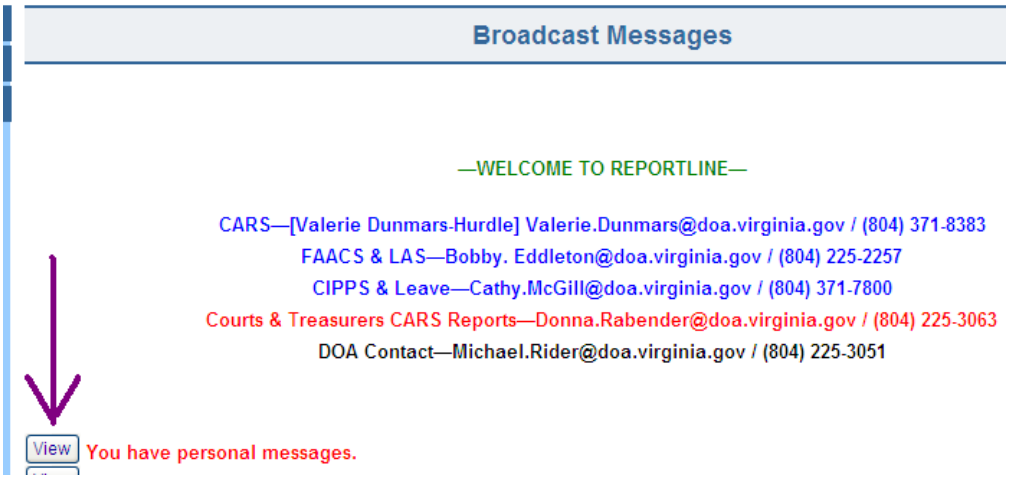
For specific Report Families you use, the DOA Contact's name, E-mail, and phone number are displayed. The DOA Reportline System Manager Contact data is also available.

Continued on next page

Broadcast Messages, Continued

Personal Message—Use VIEW BUTTON

Whenever DOA posts Reportline-related personal (individual) or special messages, you will find a VIEW button only when these messages have been posted. Click this button to view the message.



Informational messages may appear in the bottom, left-hand corner to provide feedback regarding actions which you have been taken such as login successful or you have special messages pending to be read.

Continued on next page

Broadcast Messages, Continued

Navigation

Navigation buttons located at the Broadcast Messages screen link you to other Reportline screens or perform requested functions as described below.

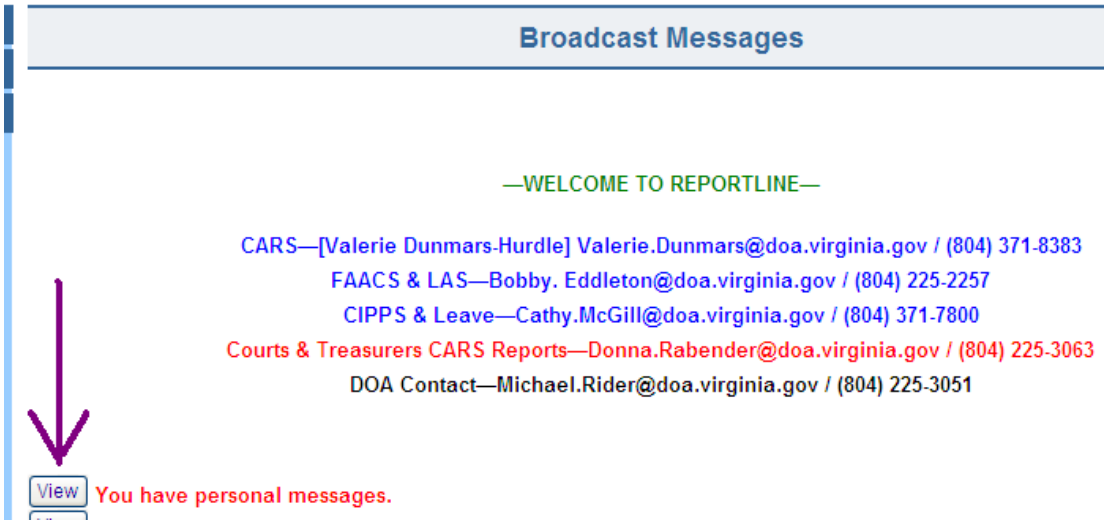
BUTTON	DESCRIPTION
VIEW Special Announcements	**If** a special announcement is available for viewing, this button displays. Additionally, the informational message "There is a Special Announcement" appears in the bottom left corner of the *Broadcast Message* page. Links the user to the *Special Announcement* page and displays additional global announcements directed to all **Reportline** users.
Personal Messages	If a personal announcement is available for viewing, this button displays. Additionally, the informational message "You have personal messages" appears in the bottom left corner of the *Broadcast Message* page. Links the user to the *Personal Messages* page and displays notices solely for the individual Reportline user.
Main Menu	Links the Main Menu page.
Log Off	Returns the to the *Logon* page and signs you out of Reportline.
Help	Links you to the Help screen.

Special Announcements & Personal Messages from DOA

Special Announcement

The *Special Announcements* page communicates global messages to the **Reportline** user population.

Read the announcement by clicking **VIEW** to the left of the message. After reading the message, click **DELETE** to remove the message.



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Special Announcements & Personal Messages from DOA, Continued

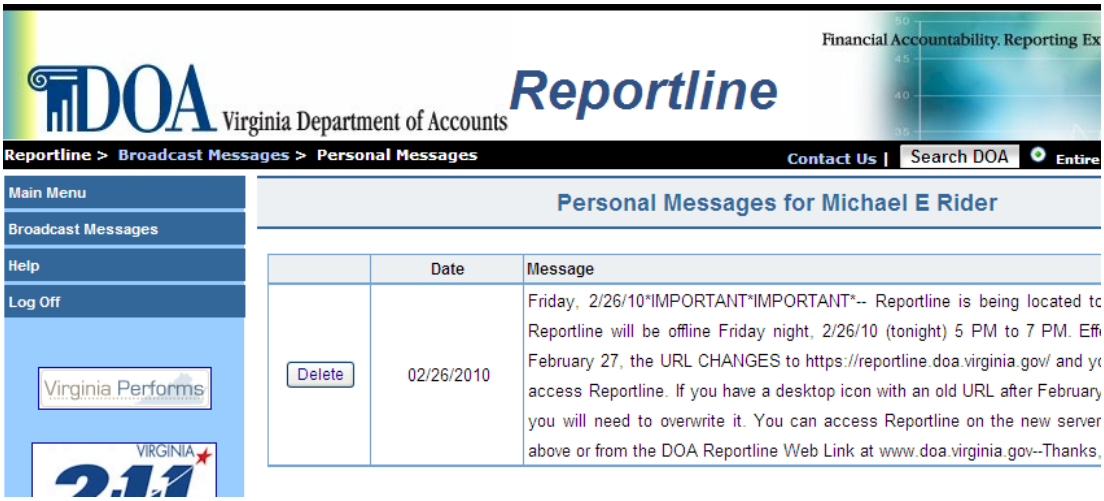
Personal Messages

The *Personal Messages* page communicates messages intended solely for the individual **Reportline** user logged on.

Remove a message by clicking **DELETE** shown to the left of the Date.

An informational message displays stating the message has been deleted.

Undeleted messages are deleted automatically within thirty days.



Main Menu Page

Main Menu

The *Main Menu* page is the central navigation page for **Reportline.**

Navigation

Navigation buttons located in the left-hand margin of the page link to other **Reportline** pages or perform requested functions as described below.

Button	Description
Access Files	Links to a listing reports available for viewing and downloading.
Personal Options	Links to a page containing personal data such as name and email address. Changes to personal information are made on this page.
Broadcast Messages	Links to the *Broadcast Messages* page where global and individual messages for all **Reportline** users can be viewed.
Available Reports	Opens a new window which shows all available reports in the Reportline application. Some reports will not be available to all users due to security requirements.
Help	Opens a new window containing information about the page.
Log Off	Logs you off the system.

Access Files Page

Selecting Your Reports

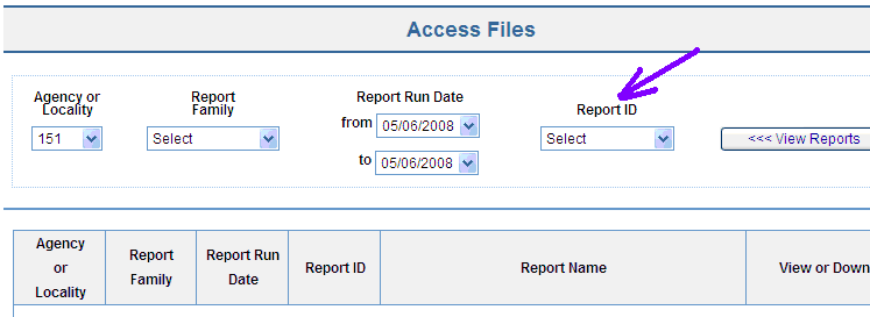
From **MAIN MENU**, click **ACCESS FILES**.

The Access Files page allows you to select specific files to view and/or save at a server or personal computer. You can also print specific reports as well.

Report selection is refined by using the following selection dropdown boxes.

- **Agency or Locality**
- **Report Family**
- **Report Run Date**
  - This is NOT the period ending date; it is the actual date when the report processed in the respective DOA computer system used to generate your Reportline report.
- **Report ID**
  - "Select" or "All" = All reports for a Report Family
  - Reports for which you have access are listed numerically and then alphabetically; they are NOT categorized by Report Family in this pull-down menu.

Reportline Reports Identified by Prefixes and Suffixes



CARS Reports are identified in Reportline by their **prefixes** and **suffixes**.

the monthly **ACTR 0402 Options: C1 Trial Balance of General Ledger Accounts by Agency/Fund Detail/Project**
is listed in Reportline under the Report ID of OR0402C1.

Reportline PREFIXES (where **O** = Cycle; **R** = Report)

Monthly Cycle O
(Other Monthly Cycles I, M, N, P, Q, R, T; Weekly Cycles U, V,W)

R Report

Access Files Page, Continued

Reportline SUFFIXES

Numeric suffixes are options and shown in Reportline with and without the corresponding Alpha designation found on the upper, left-hand of the CARS reports.

A (precedes the **first** number)
B (precedes the **second** number)
C (precedes the **third** number)
D (precedes the **fourth** number)

These **silent-printed/non-printed letters** are combined **with numbers** to define the following data as follows:

A1	Trial Balance of GLAs by Agency/Fund
A2	Trail Balance of GLAs by Agency/Fund—Operating
B1	Trial Balance of GLAs by Agency/Fund Detail
B2	Trail Balance of GLAs by Agency/Fund—Operating
B3	Trail Balance of GLAs by Agency/Fund—Capital
B4	Trial Balance of GLAs by Control Agency/Fund Detail
C1	Trial Balance of GLAs by Agency /Fund Detail Project
C4	Trail Balance of GLAs
D1	Trial Balance of GLAs by Fund Detail
D2	Trial Balance of GLAs by Fund Detail— Operating
E1	Trial Balance of GLAs by Fund
F1	Statewide Summary Report

Report ID Example = OR 0402 C1

OR = Monthly Report run in Cycle O

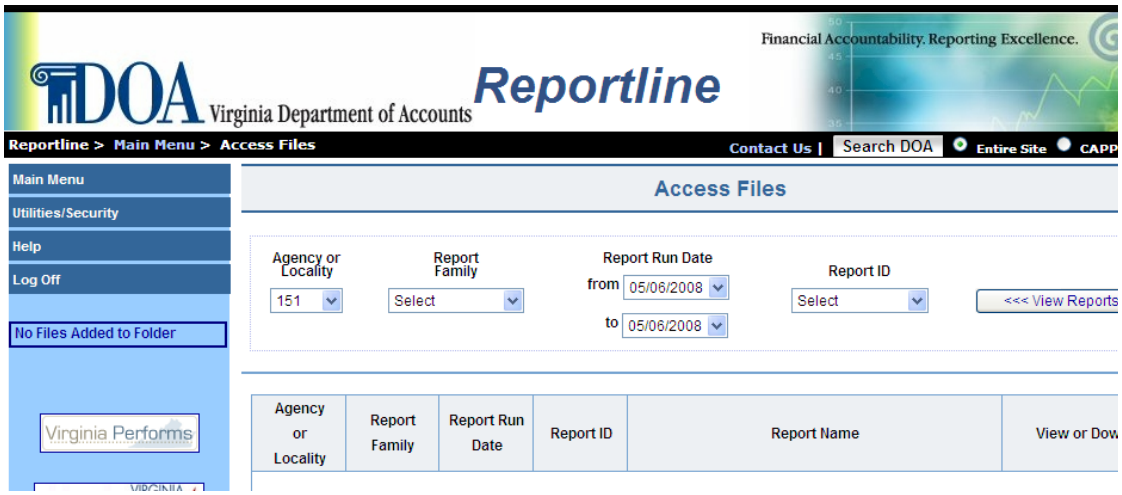
0402 = Report Number from CARS as in ACTR 0402

C 1 = Trial Balance of GLA's by Agency/Fund Detail/Project

Continued on next page

Access Files Page, Continued

After you have entered your selection, click **VIEW REPORTS**.



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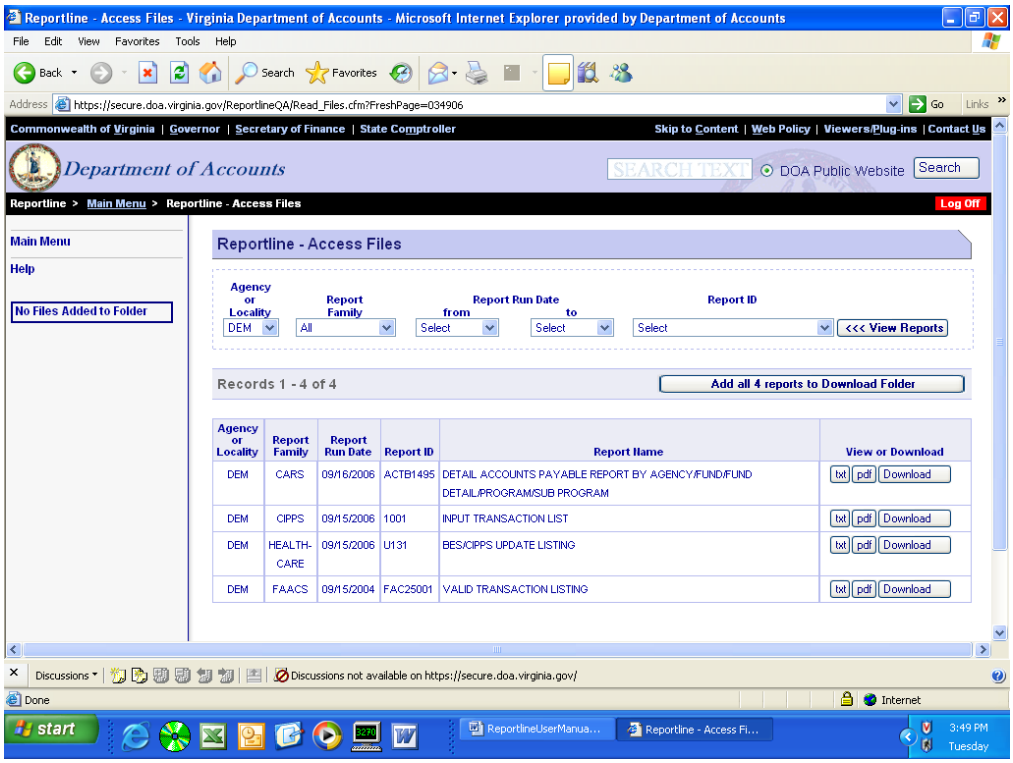
Access Files Page, Continued

Report Can Be Viewed PDF or TXT

You can view the report online in Portable Document Format (PDF). Click the **PDF** button. PDF is an image file of your report.

You need the Adobe Acrobat Reader software installed on your PC. This is available as a free download from the Adobe Corporation's web site. The PDF format feature shows the report in the same layout as it would be printed.



Use the **TXT** button to view the report for TEXT (TXT) viewing.

When you do this, the report loads from the Internet to your desktop.

When the report opens, it adjusts to the defaults of your word processing package or text editor—thereby requiring you to manually adjust the formatting to accommodate the way the report should print.

Access Files Page, Continued

Using Adobe Acrobat Reader Version 5 or higher?

Important

If you use **Adobe Acrobat Reader Version 5 or higher and cannot view the report online when you click the PDF button,** you need to have the Reader open in a separate screen window and not in the Internet Browser.

To do this, make the following Acrobat Reader software setup change similar to this example for Version 5.

Version 5 Users

Step	Action
1	Open Adobe Acrobat Reader (START, PROGRAMS, ADOBE READER
2	Click <EDIT> <PREFERENCES>
3	Click <OPTIONS> in the left menu if it is not already there.
4	Remove the check from the DISPLAY PDF IN BROWSER box.
5	<OK>
6	Close and reopen Internet Browser.

PDF Format Choice & Search/Find Feature

Click on PDF button to view the report using the Adobe Acrobat Reader.

The report appears online in the same format as it would appear in hardcopy print.

You can use the Adobe software to save and/or print the report.

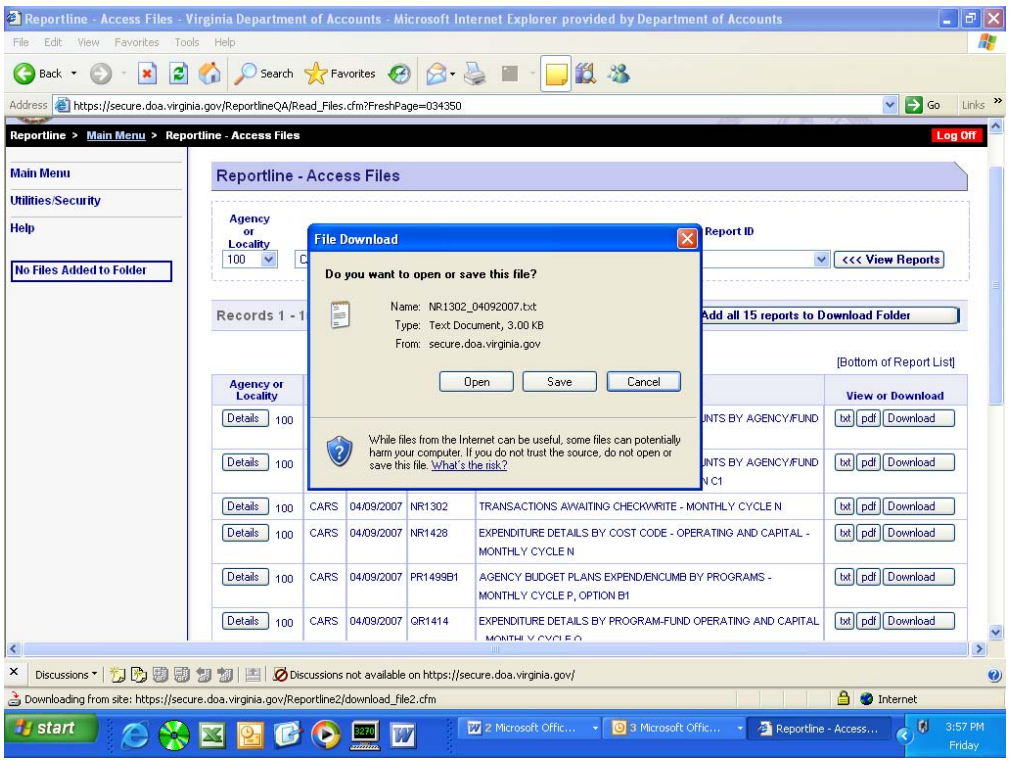
Use the FIND feature—you can scroll through a PDF document doing a search & find.

Continued on next page

Access Files Page, Continued

TEXT (TXT) Format Choice

After clicking on **TXT**, a pop-up **File Download** box displays. Click the appropriate action which typically is **Open.**



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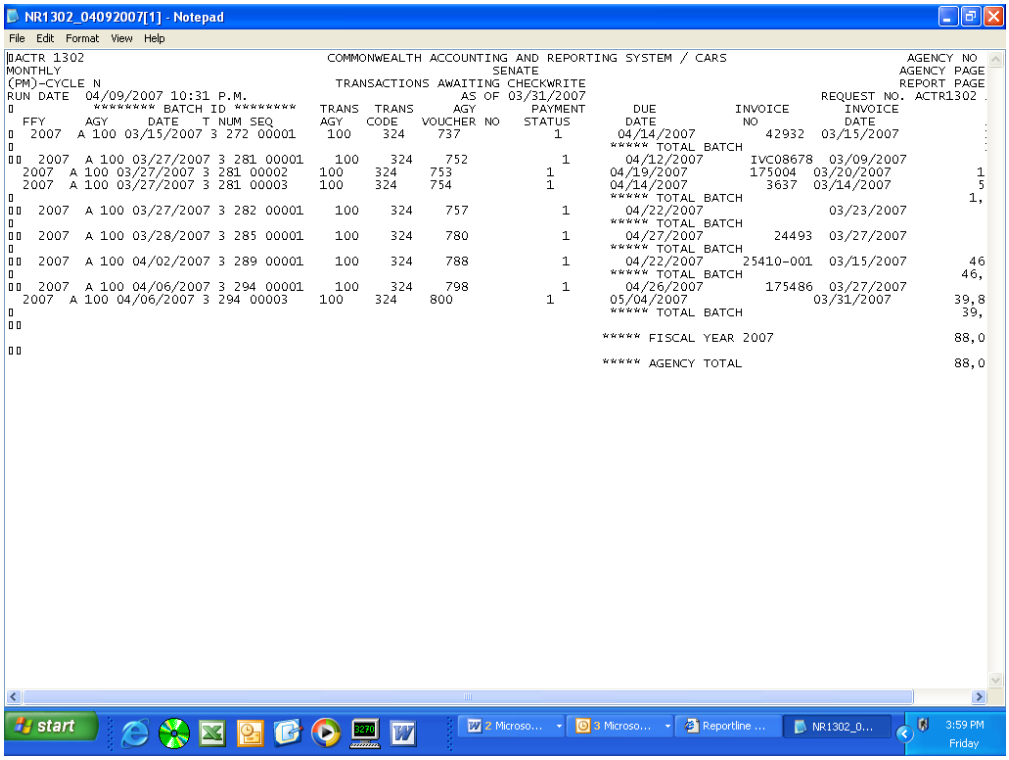
Access Files Page, Continued

TXT File Opens in a WP Application

The report opens in a text editing/word processing application (typically Notepad or Microsoft Word, e.g.).

It is not formatted.



Formatting a TXT Report

Use your editing software to reformat the report.

Note that the report's appearance on the screen in not necessarily the way the report will look when printed. Therefore, as you reformat the report, use the Print View feature to check the report's layout as you edit.

Using the Download Feature to View, Print, and/or Save Multiple Reports

Introduction

A Reportline feature allows you to—

1. **view,**
2. **print, and/or**
3. **save multiple reports.**

When you use this feature, reports are compressed (zipped) on the DOA side and extracted (unzipped) by you. Software to UNZIP your compressed Reportline reports is your responsibility to have installed at your desktop PC.

This feature allows you to view, save, and/or print MULTIPLE documents in TXT or PDF format.

If you are a low-volume user of Reportline, you might find it efficient to continue accessing a single report each time. DOA recommends this method for locality personnel in Treasurer and Clerk of the Court offices.

Download Features

1. Select multiple reports as a defined group without opening each report individually to view/print/save.
2. Identify grouped reports for the Reportline session so you can verify the report selected is the requested one to be printed/saved/filed.
3. Download and compress grouped reports to a zipped (compressed) file to save space and place in a download folder as a compressed (zipped) file.

Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Download Process

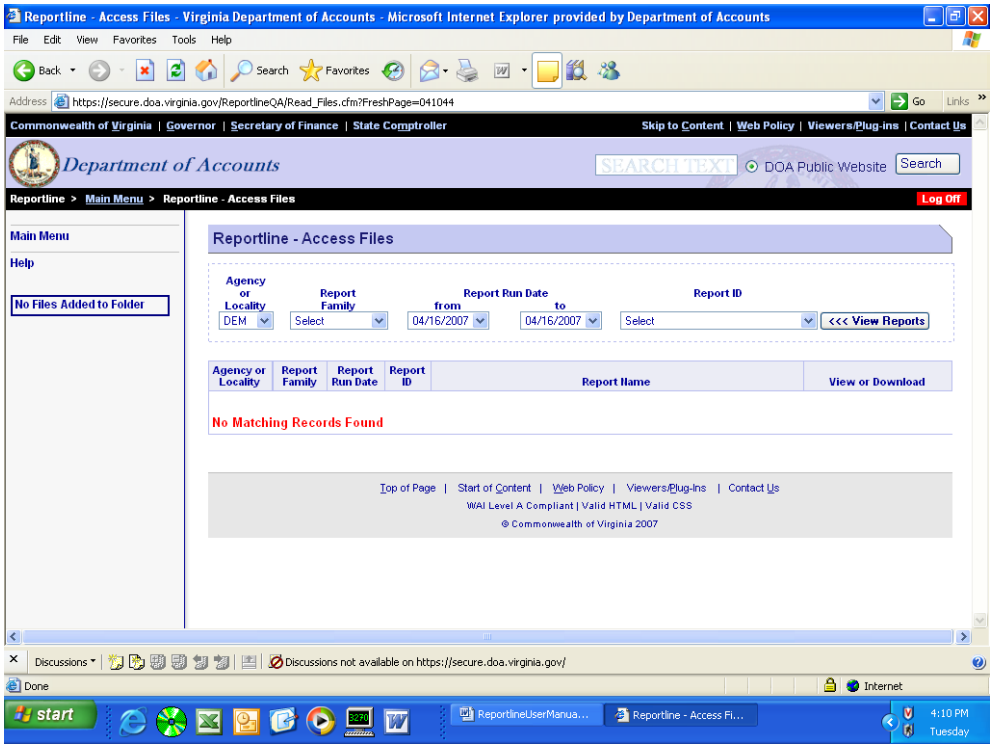
The following table illustrates the stages in the Download process.

Stage	Description
1	Navigating and scrolling at the ACCESS FILES screen
2	Downloading reports
3	Extracting compressed (zipped) reports
4	Saving multiple reports
5	Printing multiple reports

Access Files Screen Sample

The Download feature is located as a button choice at the ACCESS FILES screen.

From the MAIN MENU, click ACCESS FILES for this screen to load in.



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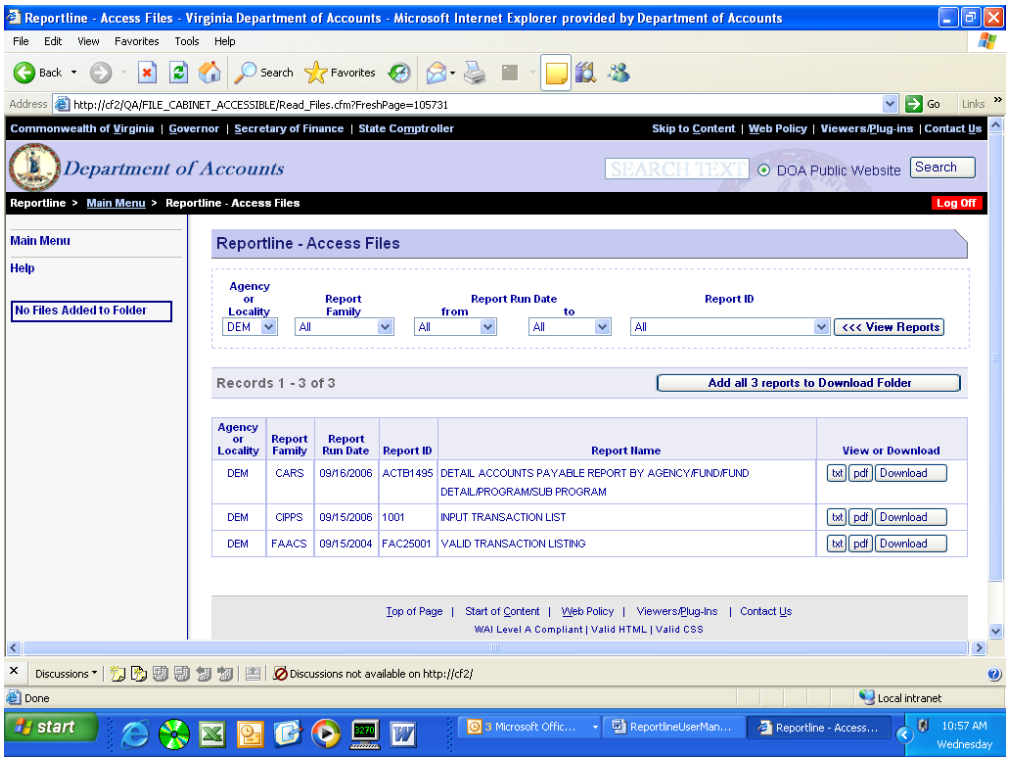
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

View or Download

After you enter report selection criteria in the field headings, you can VIEW or DOWNLOAD reports individually or as a group as follows:

a) Individually—txt and pdf viewing buttons

b) Multiple reports—Download button



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Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Navigation Buttons

After your reports load in, navigate the screen by using the right-side, scroll bar or the BOTTOM OF REPORT LIST or the TOP OF REPORT LIST buttons located above and below the *View or Download* column on the right-hand side.

IMPORTANT: Before You Download

Before you download reports, establish a PC File Folder location for your selected, downloaded reports to load into. Note the name of its location. If you do not, the system places downloaded reports into a system-selected location you might find difficult to locate.

Contact your Information Technology staff to guide you if needed to create a file folder location on your PC.

Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Select Reports to Download

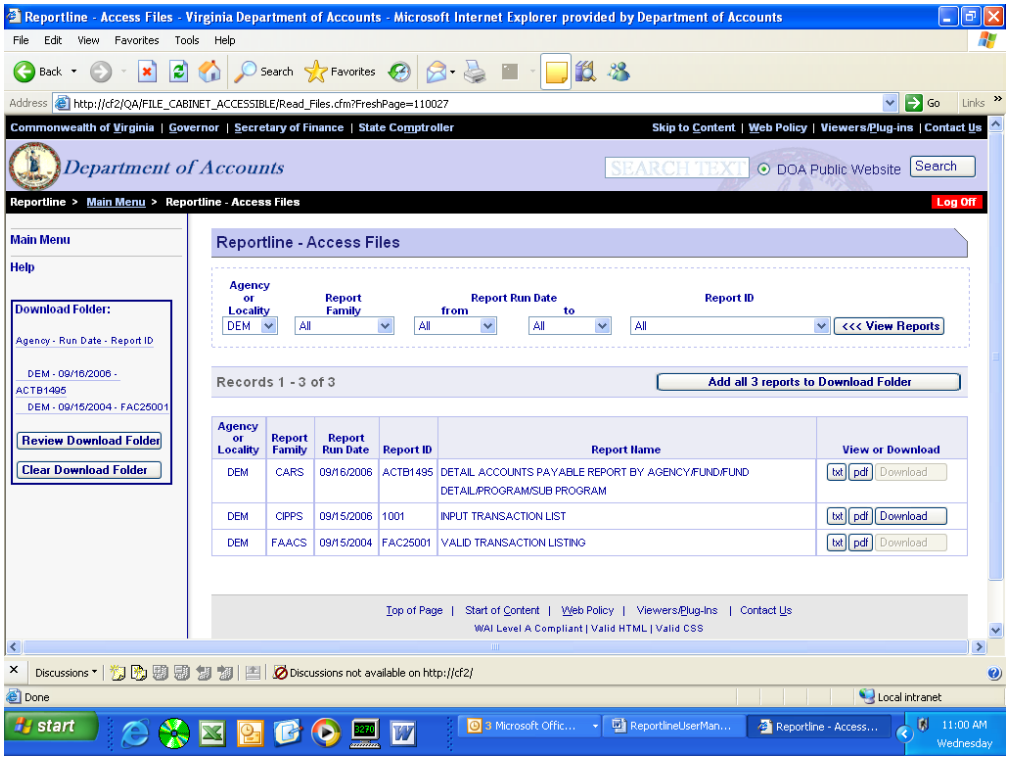
After reports load into the ACCESS FILES screen, click the **DOWNLOAD** button for each report you want to download.

The DOWNLOAD button turns to gray to show it has been added to the left-column's Download Folder.

Important

WAIT UNTIL THE FILE HAS BEEN PLACED IN THE DOWNLOAD FOLDER BEFORE YOU SELECT THE NEXT REPORT TO DOWNLOAD.

At this point, the report files have NOT been downloaded—just added to a pending area, much like adding them to a shopping basket for checkout.



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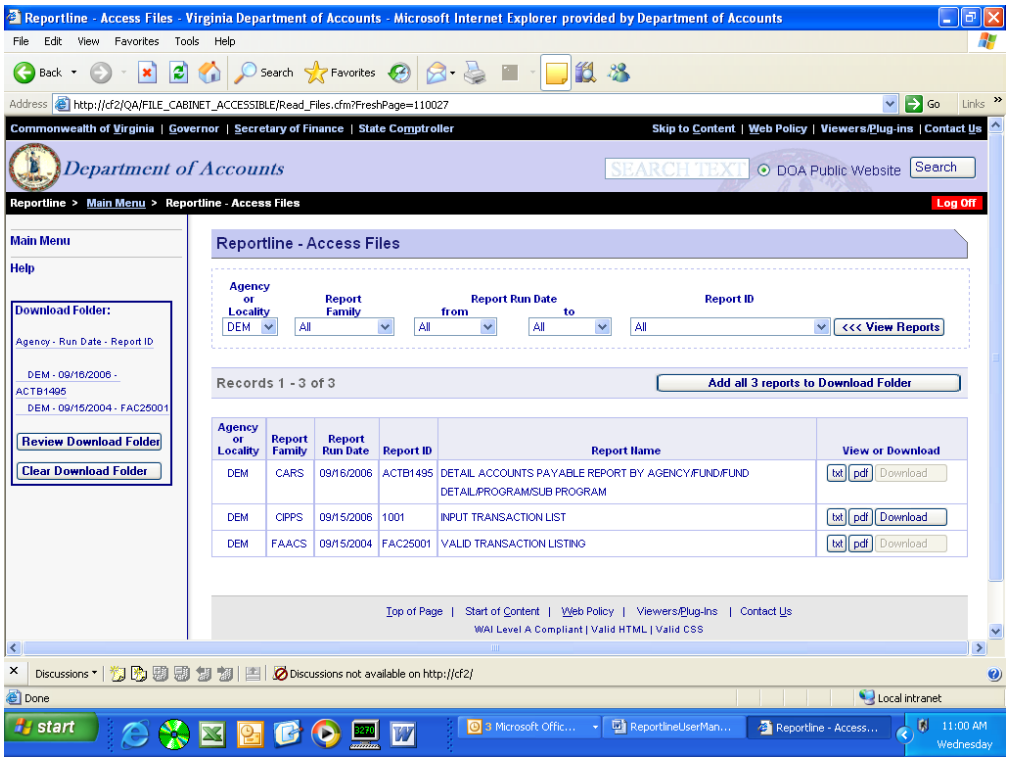
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Clearing Your Download Folder

If you want to start over with the download, click **CLEAR**; your prior Access Files screen returns as it was without files selected for downloading.

Review Download Folder

Click **REVIEW DOWNLOAD FOLDER** button on left-hand side to view the reports selected for download.



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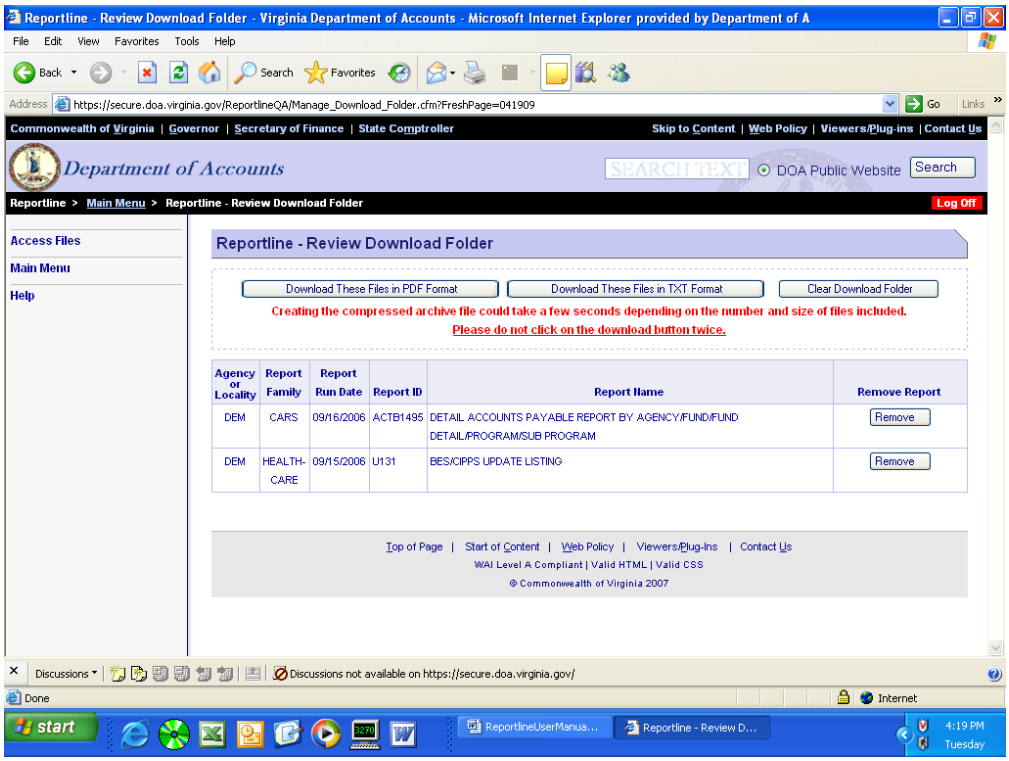
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Two Format Choices for Downloading

You can download in **PDF** or **TXT** format.



Removing Reports

Cancel the request by clicking these buttons:

CLEAR DOWNLOAD FOLDER

REMOVE

Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

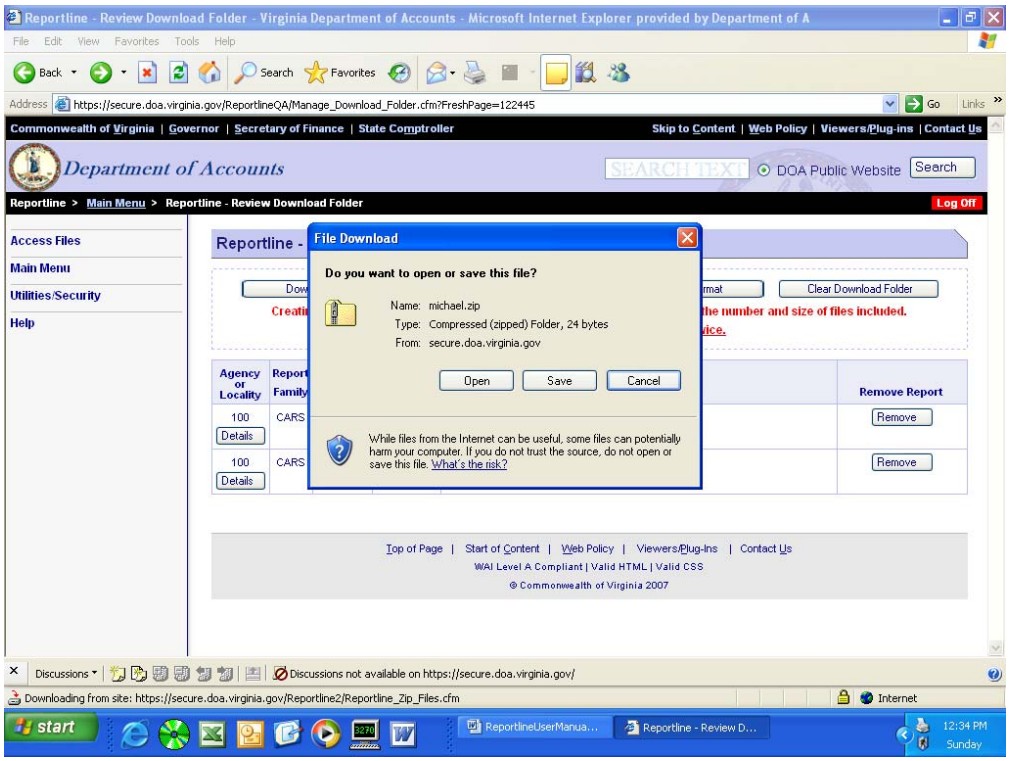
Downloading in PDF Format

Before you download reports, establish a PC File Folder location for your compressed (zipped) reports to load into. Note the name of its location. If you do not, the system places downloaded reports into a system-selected location you might find difficult to locate.

Contact your Information Technology staff to guide you if needed to create a file folder location on your PC.

Click **DOWNLOADTHESE FILES IN PDF FORMAT**.
They download to a temporary file area on your PC waiting for you to OPEN (to view) or SAVE.
The **Do you want to open or save this file?** screen loads in.

Open the Downloaded Report(s) to View?

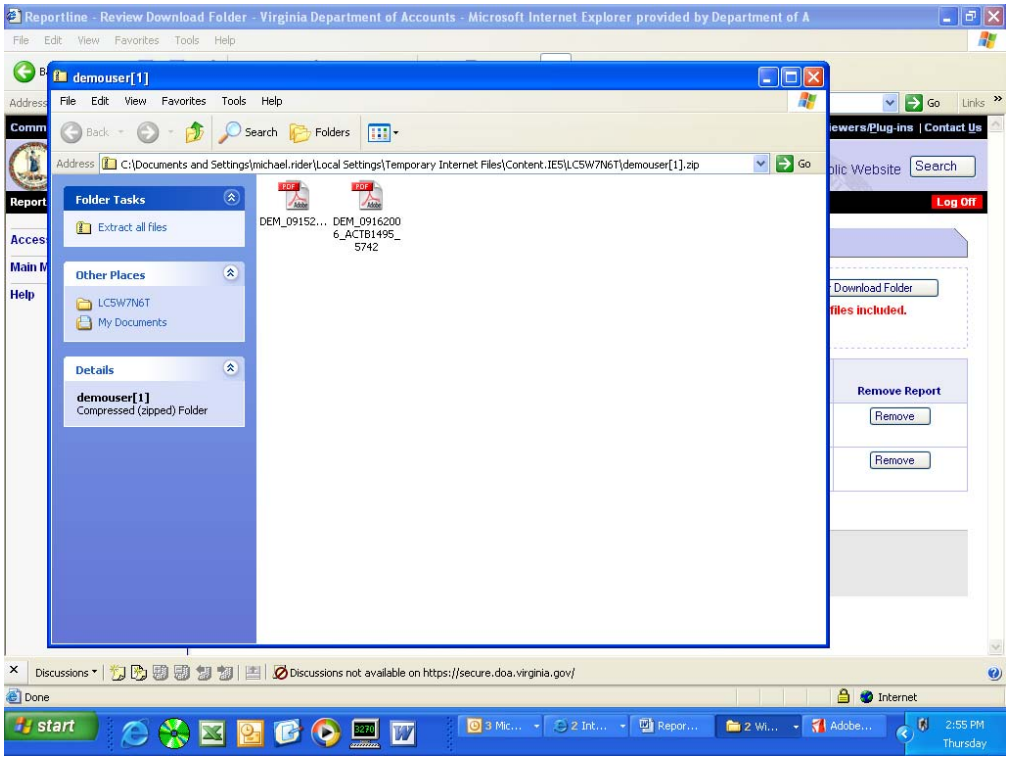


When you click **OPEN**, you can view the report.
When you **SAVE**, your report files are saved to your desktop PC or LAN.

Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

When you **OPEN**, the following screen appears.



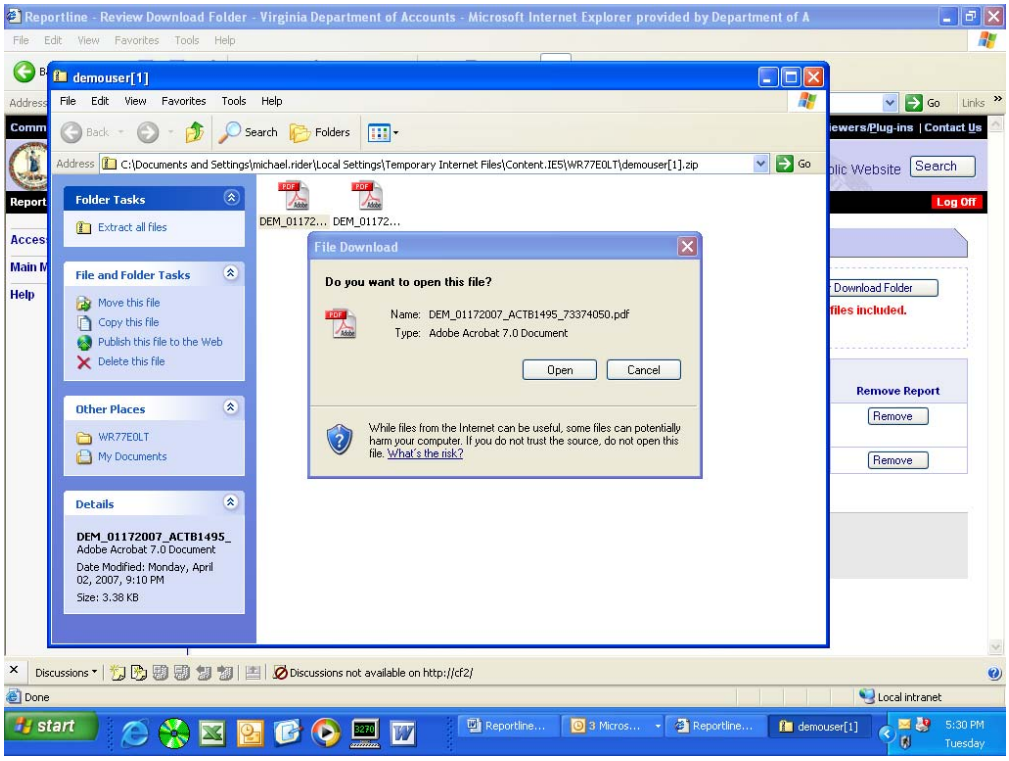
Highlight the file you want to OPEN and double click on the file.

Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

The following screen opens. If you want to view the file, click OPEN.

Click CANCEL to exit.



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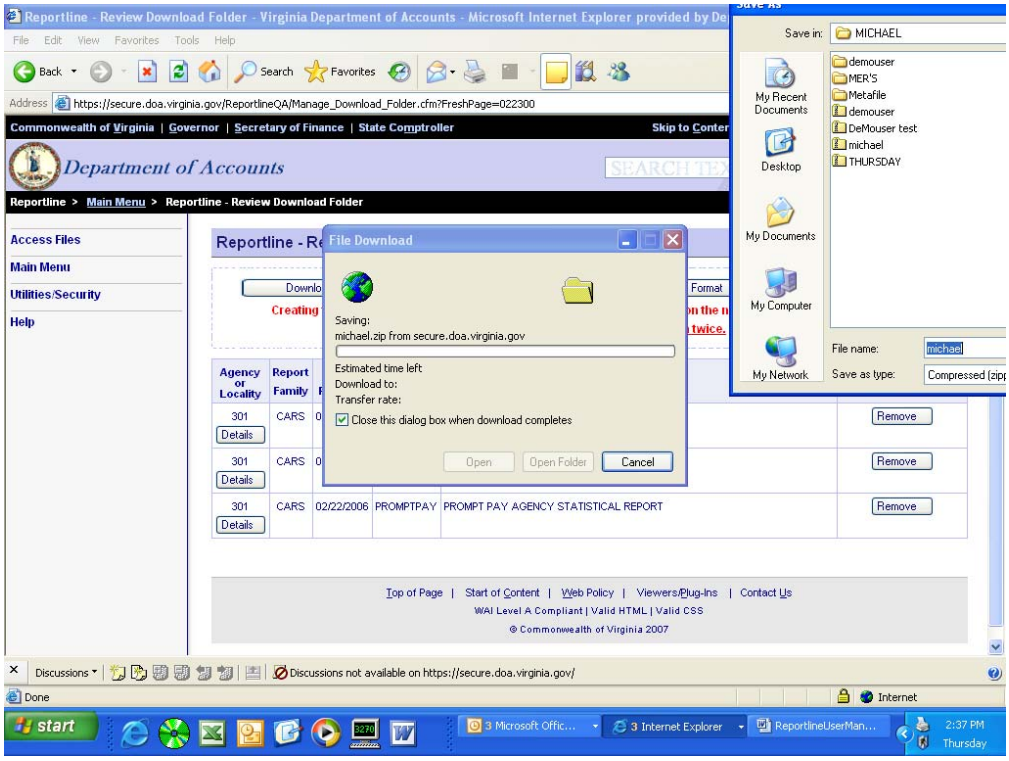
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Saving Zipped Files to Your Desktop PC or LAN Server

After you click **DOWNLOAD THESE FILES IN PDF FORMAT**, the files are downloaded.

They download to a temporary file area on your PC waiting for you to OPEN (to view) or SAVE.



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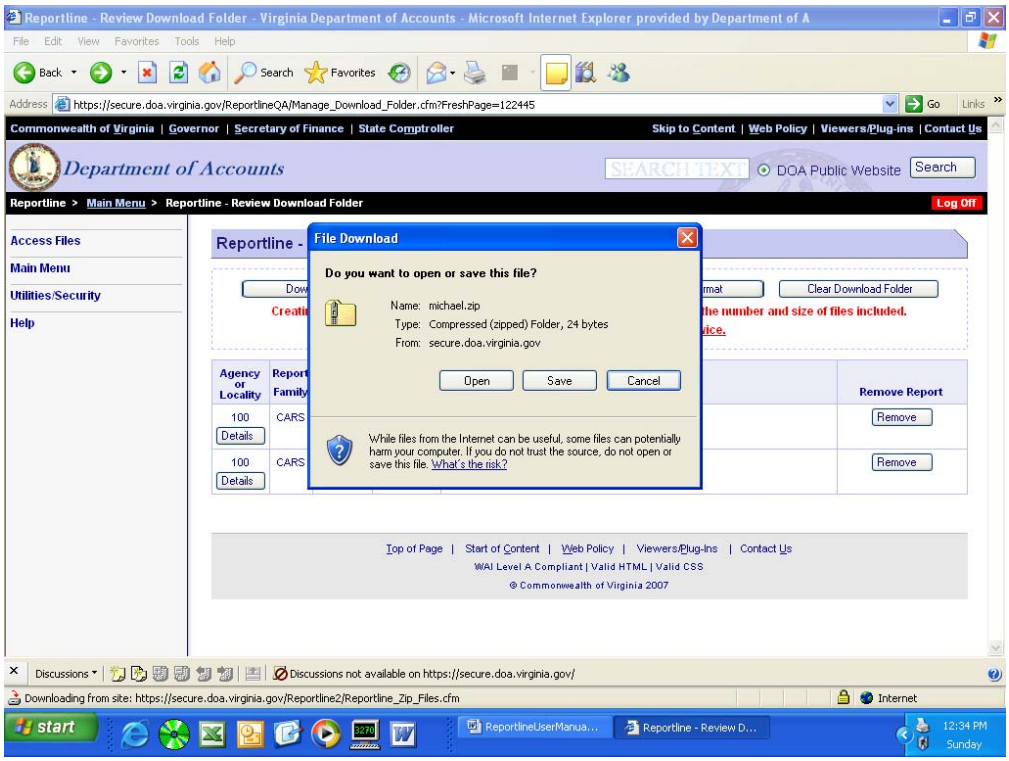
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

The **Do you want to open or save this file?** screen loads in.

Click **SAVE**.



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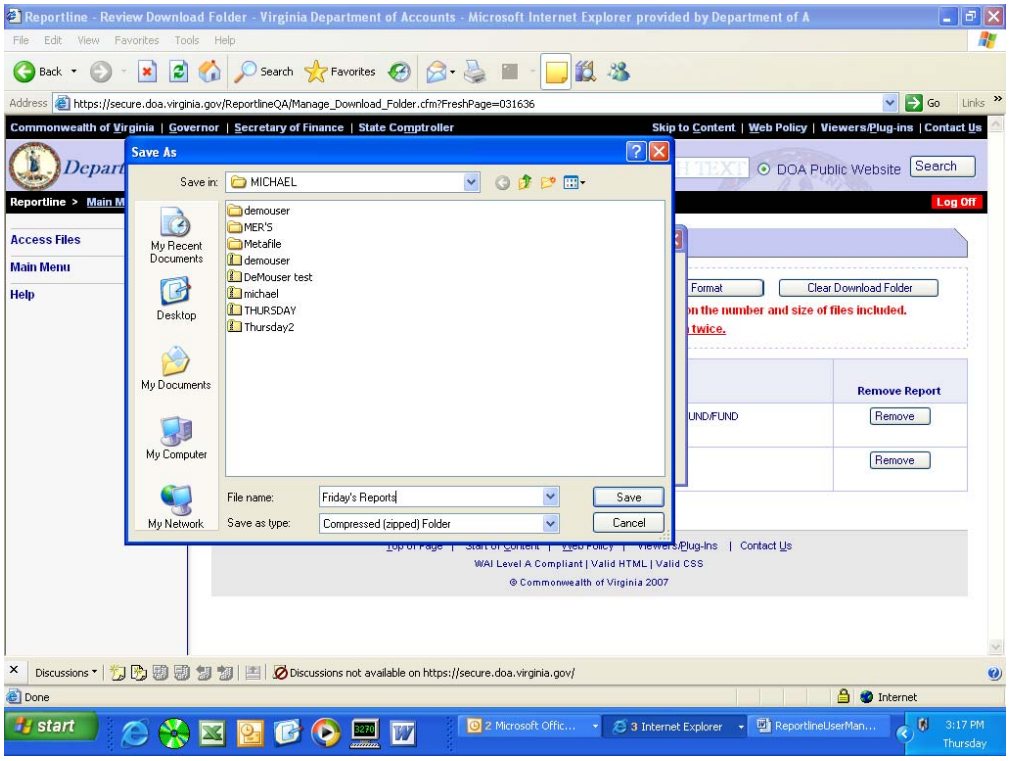
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Save As Screen

Before you download reports, establish a PC File Folder location for your selected, downloaded reports to load into. Note the name of its location. If you do not, the system places downloaded reports into a system-selected location you might find difficult to locate.

Contact your Information Technology staff to guide you if needed to create a file folder location on your PC.

Enter the file location where you want your downloaded, compressed reports stored.



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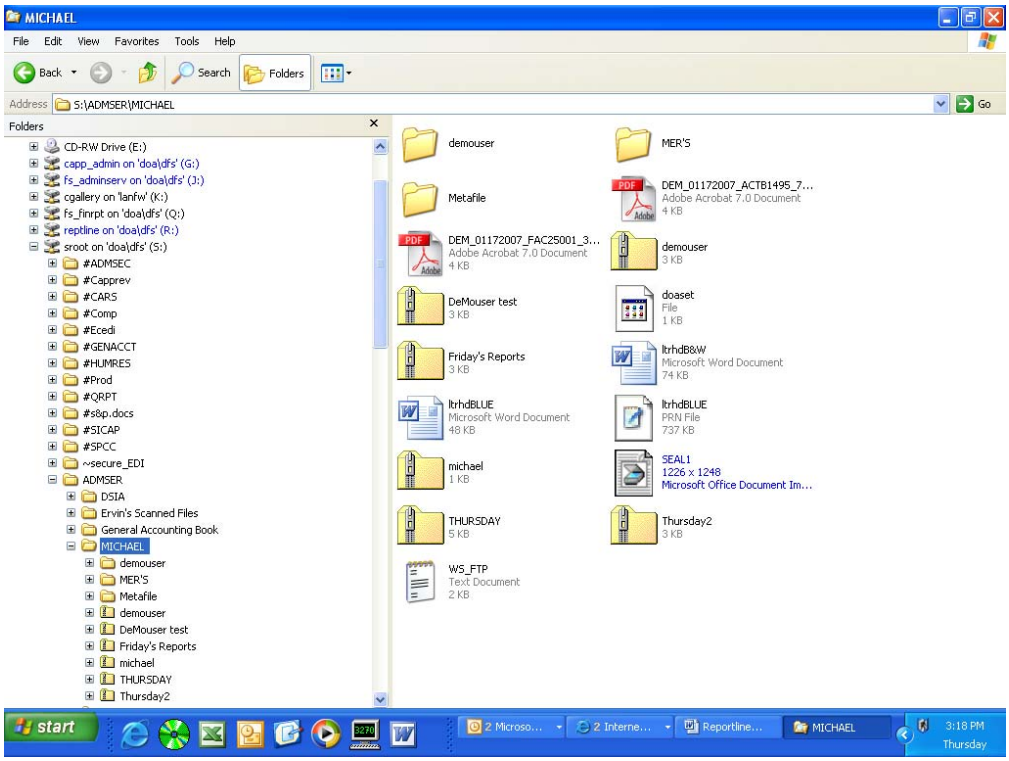
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

How to Unzip Your Saved Reports

Locate your file folder containing your zipped reports.

Use EXPLORE if needed to locate your file folder. Note that the file folder is a zipped folder and the icon appears like a file folder with a zipper across the middle.



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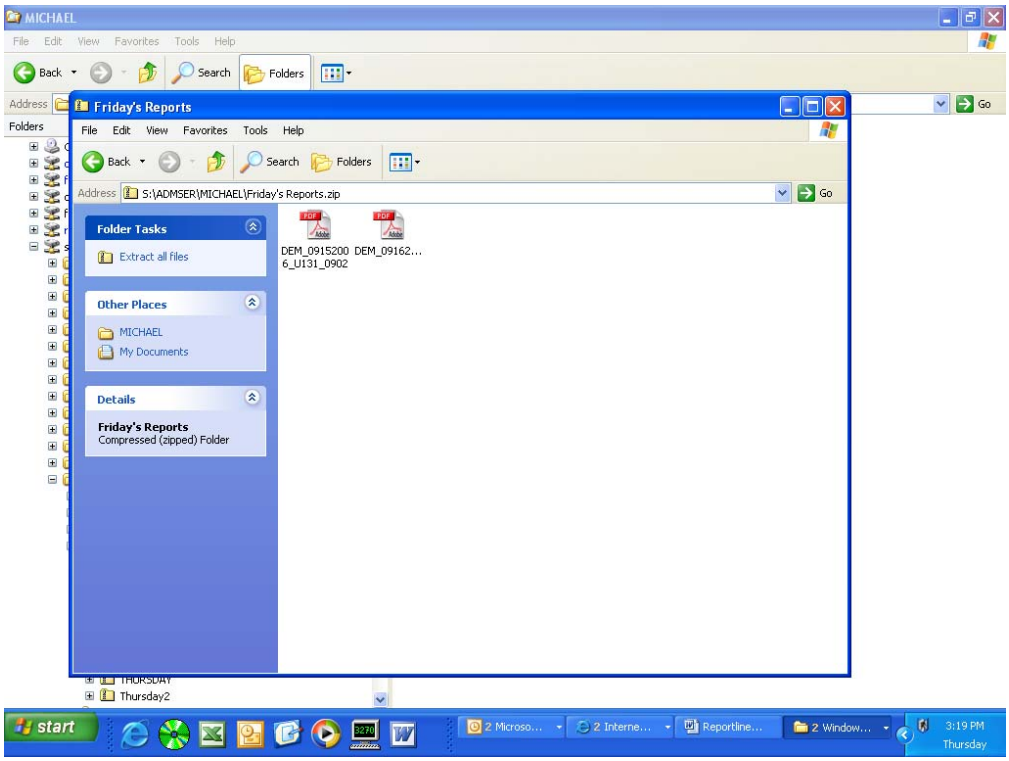
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Double-click on the zipped folder to open it to show its contents. You will have the FOLDER TASKS column at the left.



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Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

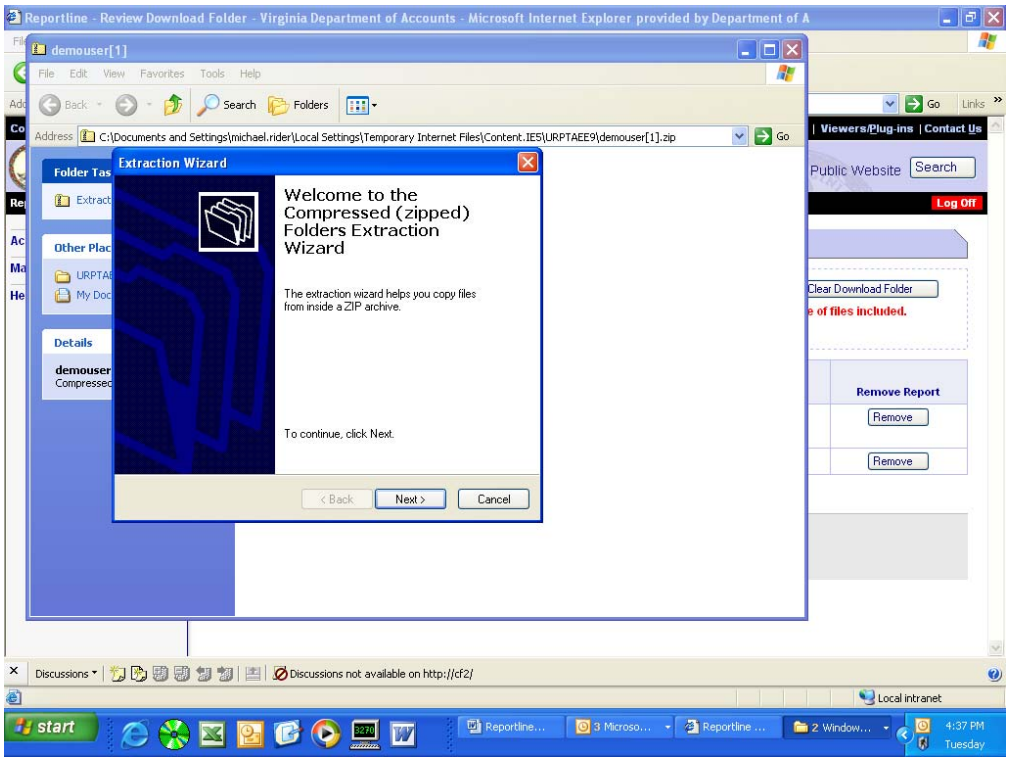
Extracting All Files

At the left-side, top column you will see the Folder Tasks heading.

Click: **Extract all files**

These procedures assume you have XP 2000 or comparable Extraction Wizard software. If not, follow your own extraction software steps to unzip the zipped Reportline reports.

In this screen example, the Windows XP 2000 Extraction Wizard loads in.



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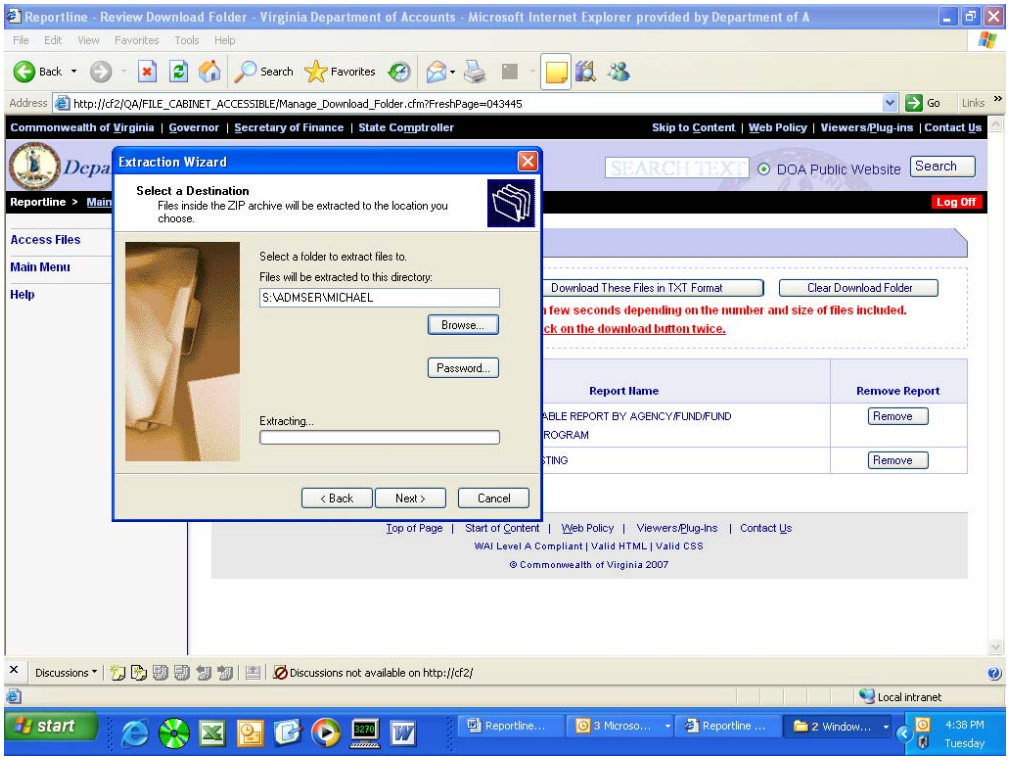
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued



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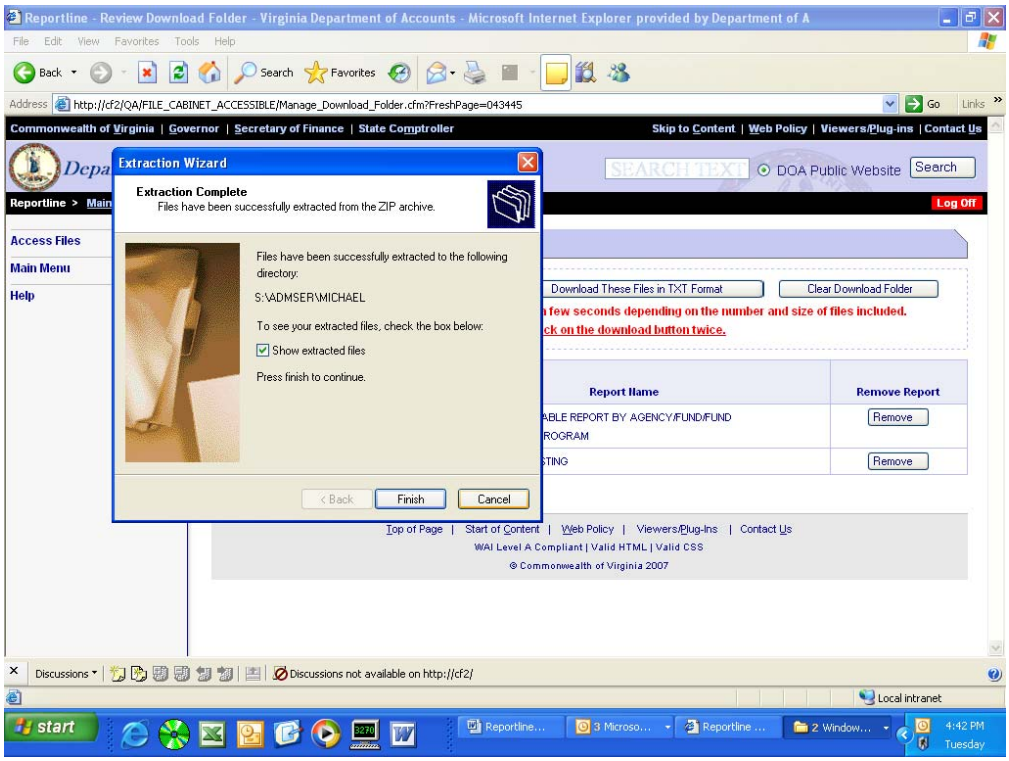
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

Showing Extracting Files

The "Show extracted files" box is checked.

Press **FINISH.**

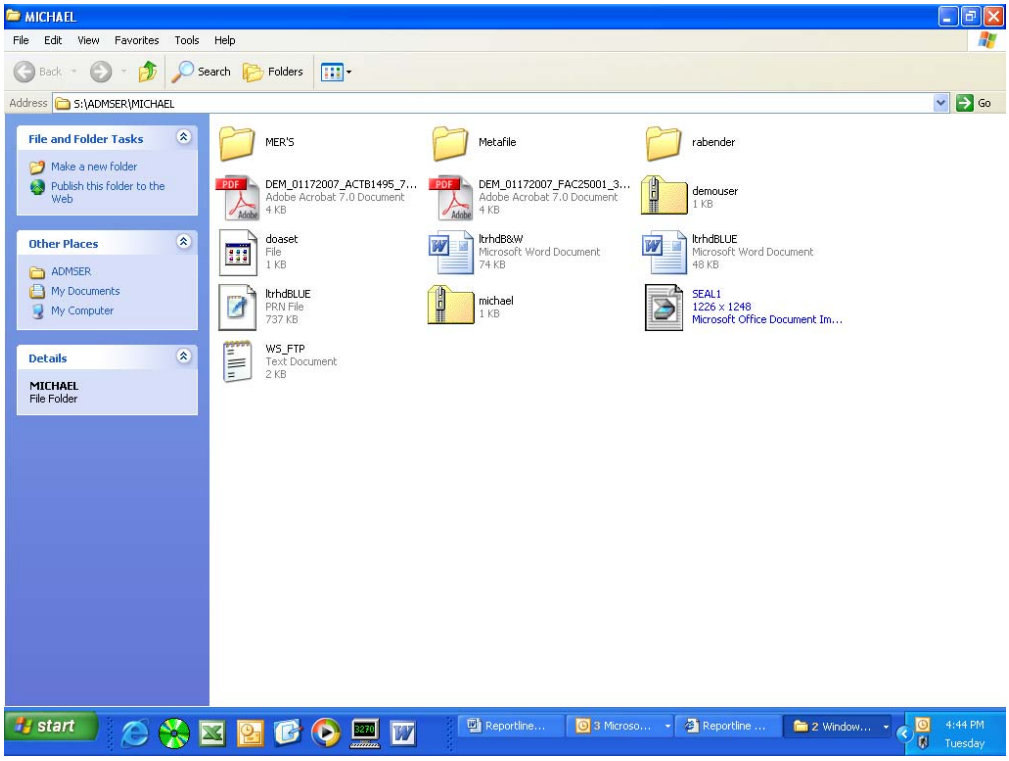


Continued on next page

Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

PDF Files Extracted for Viewing

After the extraction software completes, the PDF files (identified by the PDF icon) are available for viewing and located in your PC file directory that was indicated during the extraction.



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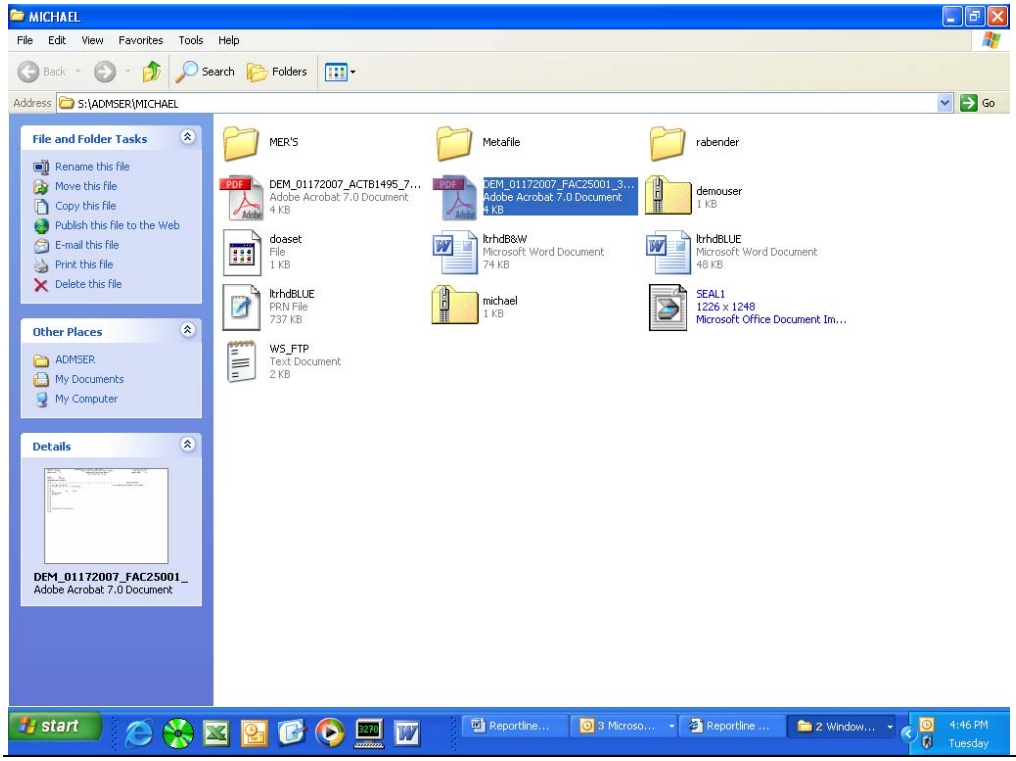
Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

When You Highlight a Report Name

When you highlight a PDF file at this screen, the **DETAILS** box opens in the left-hand column at the bottom of the screen. It shows you an image of the report's first page, along with report identification data.

The **File and Folder Tasks** box expands to allow you to perform the following file tasks:

1. Rename
2. Move
3. Copy
4. Publish the file to the web
5. E-mail
6. **PRINT** [directly to your desktop printer without opening to view the file]
7. Delete



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Using the Download Feature to View, Print, and/or Save Multiple Reports, Continued

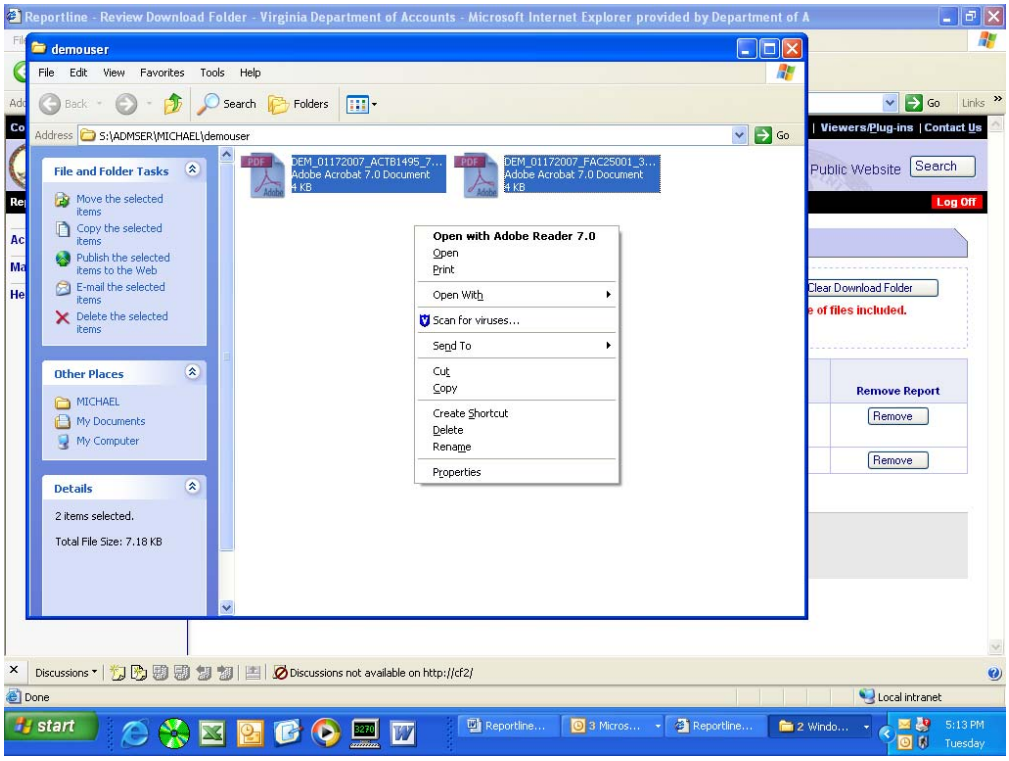
Printing Multiple Reports

When the extraction has unzipped your report files and the report names appear on the screen, **highlight all reports** you want to print.

Use your SHIFT key in combination with mouse's left-sided button to select multiple reports to be highlighted.

Ensure your cursor is on one of the file names before you right click your mouse's right-sided button to get the PRINT task option.

Click **PRINT** to route your reports to your local printer without the reports opening.



How to Set Up Your Printer to Duplex (Two-Sided) Print

Duplex Printer Capability Restricted by Printer	You can only print duplex (two-sided) if your printer offers duplex printing. For assistance with your printer to 1) determine if your printer can print duplex and 2) set the printer default to duplex printing for all documents, contact your IT staff for assistance.

Personal Options Page

View Personal Options

The Personal Options screen allows you to view your existing information regarding—

- User ID
- Password (the actual password is not displayed, but an ***** indicates it does exist.)
- Email Address 1
- Email Address 2
- Challenge Question 1
- Challenge Question 2
- Hint (to help in remembering current password.)
- Date Password Changed—reflects last date your password was altered.
- Date Last Updated

<u>Date Examples</u>

The DATE LAST UPDATED field is the date the security record was last updated and DATE PASSWORD CHANGED is when password was changed. For example, a password could be changed on 6/1/2010 and then on 6/16/2010 the e-mail address is changed. In this case, DATE LAST UPDATED would be 6/16/2010 and DATE PASSWORD CHANGED would be 6/1/2010.

Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.

Personal Options Page, Continued

Navigation

Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.

Button	Links to …
Main Menu	Main Menu screen.
Help	Help screen.
Log off	Log On screen and signs out of **Reportline.**

Edit Personal Options

The Edit Personal Options screen allows you to change any one or all of the following:

- Password (the actual password is not displayed, but an * is displayed for each password character.)
- Email Address 1
- Email Address 2
- Challenge Question 1
- Challenge Question 2
- Hint (to help in remembering current password.)

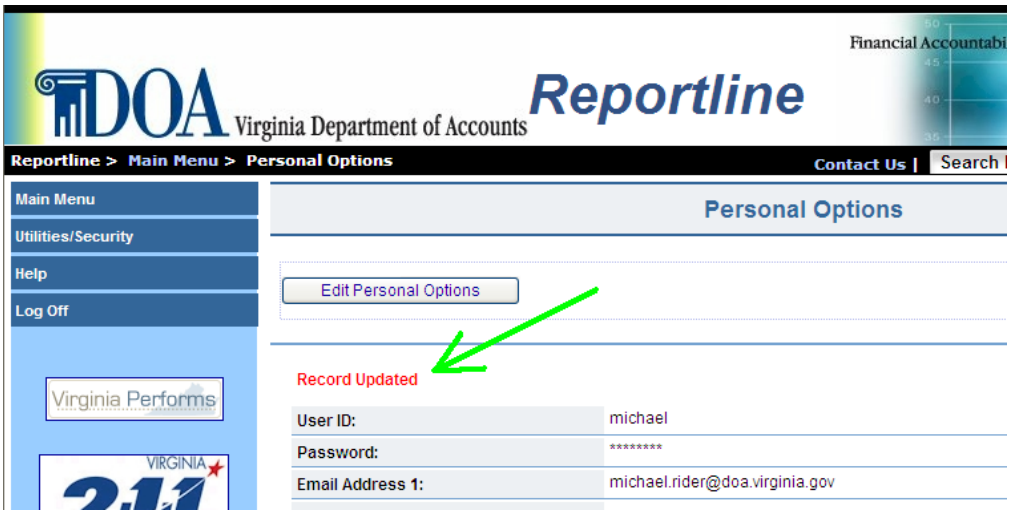
Click **CANCEL** if the information entered is not correct or you are not satisfied with the changes

Click **ACCEPT** to have your edited changes accepted by the system.

Personal Options Page, Continued

Record Updated

The screen returns to the Personal Options screen and indicates the record has been updated.



Navigation

Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.

Button	Description
Main Menu	Links to the Main Menu.
Help	Links to the Help Screen.
Log off	Returns the user to the Log On page and signs them out of **Reportline.**

Reportline Contacts

DOA Staff	After you log in, reference your **Broadcast Screen** for names of DOA staff members who can assist you with Reportline reports. These are shown by specific Report Family, locality contact (Treasurer and Clerk of the Court staff), and the DOA Reportline Administrator.
Agency Reportline Security Officer	Contact your Agency Reportline Security Officer directly if you forget your password and other security-related questions.
Contact Us Button	Use the Reportline **Contact Us** button for assistance. An e-mail is sent to the DOA Reportline Administrator.

(ReportlineUserManual (10-18-11.doc)