

## 4. IDIS Online Reports Interface

This section describes the user interface for running IDIS Online predefined reports.

### 4.1 User Authorizations

Your IDIS user name is linked to a specific authorization level in IDIS. Unless you are an IDIS system administrator, you have the general user authorization. General users are authorized to **run, display, customize, save, export, and print** any report that is available in the **Shared Reports** folder.

### 4.2 IDIS Reports Home Page

You will use the following features the most often:

- **Shared Reports** – Displays the predefined reports. Anyone with access to IDIS Online is authorized to view, customize, save, export, and print these reports.
- **My Reports** – Every IDIS user has his or her own location to store reports that have been customized to meet specific needs. When a report is saved to **My Reports**, only the authorized user can access it.
- **History List** – IDIS users have the ability to run and store report results in their **History List** for future retrieval. This enables users to refer back to the report several times throughout the day without having to re-run the report.

Some reports may take several minutes to run. This feature allows you to have your report continue to run if you decide you would like to perform other activities in reports or IDIS while the report is running.

- **Preferences** – Allows users to customize various features of the reporting application.

### 4.3 Toolbar and Buttons

#### Toolbar

The toolbar is located above your report results. It contains several buttons that you can use to customize, save, export, and print your report.

Name	Toolbar
Basic Toolbar	
Extended Toolbar	

**Buttons**

The buttons enable you to perform actions on top of the displayed report. Key buttons are described below in Table 1, and the most used customization buttons are described in Table 2 (Refer to Section 5 for Grid Reports customization).

**Table 1. Key Buttons**

Icon	Name	Description
	Save	Enables you to save the displayed report to My Reports
	Print	Enables you to print the report directly in IDIS
	Export	Enables you to export the displayed report to an Excel spreadsheet
	Create PDF	Enables you to export the displayed report to a PDF file

**Table 2. Customization Buttons**

Icon	Name	Description
	Totals and subtotals	Enables you to add or modify totals or subtotals to your report.
	Advanced sorting	Enables you to change the sorting criteria of your Grid Report.
	Grid	Enables you to display your report as a grid.
	Graph	Enables you to display your report as a graph.
	Grid/Graph	Enables you to display your report as a grid and graph.
	Custom style	Enables you to change the appearance of your grid report to one of the predefined custom styles.
	Banding	Enables you to display your grid report with banding lines.
	Outline	Enables you to see your grid report with an outline.
	Page by	Enables you to display the page by section on your report. You can make selections on the parameters contained in the page by.
	Report filter	Enables you to display the filtering criteria used in your report.