Financials - Mobius/Mobius/ViewDirect - Report Manager Webinar
Frequently Asked Questions

#	Questions	Answers
1	How do you export reports to Excel?	CSV to Excel conversion will be covered by the Job Aid document
2	In the "Name" box on List, do we have to know the exact entire name we are looking for?	The short answer is No. If the entire name is not known, two letters of the module name will bring back all reports for that moudle. For instance, searching by 'AR' in the name box will bring back all reports starts with AR.
3	Have the report names changed, or does 40700 have different reports?	No - report names have not been changed. It is the same as the discription in Mobius. However, this does not include the nick names that have been circulated and probably used in the past.
4	In using the Explorer tab, are all reports printed shown regardless of the module you are using or will need?	Yes, in the Explorer tab, all reports from all modules within the user's business unit will be shown which can be viewed, saved or printed.
5	Will the switch to View Direct slow TeamWorks down?	We have not experienced any slowness during our testing in TeamWorks. However, SAO increased the server's memory capacity. Performance will be addressed at a high priority.
6	Will we be able to recreate reports using old data?	Nothing will be changed from the way you receive reports in Mobius. If the data is 'Static' (non-changeable), the report can be recreated. If the data is 'Dynamic' (changes), it can not.
7	Will Report Manager allow reports to be available more quickly than in Mobius?	All reports will be available in the Report Manager within 10 to 20 minutes after successful completion
8	Under "Security Manager", which roles need to be supplied in order to grant someone access to Report Manager?	The online security form has been updated to include the new roles. As of October 1st, We added a new table in online security form (Agency Specific Role) to add the role to users
9	Will Naming Conventions for all reports remain the same as they were in Mobius?	Yes - the Naming Conventions for all reports remain the same as they were in Mobius
10	Do we still select the server name?	You do not need to select the server name when running reports. The server "PSUNX" will be defaulted in the run contril page.
11	Can we run all reports when we want to? In Mobius, some reports would run monthly and there is no option to run at will, e.g., PY4710002 report or the AP0022B reports?	No, your options of running reports will be the same as Mobius. What's hanging is where and how you retreive reports. The reports that run monthly are designed to do so and are not intended to run daily nor at will.

12	**How soon will View Direct be available?**	View Direct will be available by the mid-November, 2019
13	**Will we have access to all of the reports we had access to in Mobius?**	Yes - you will have access to all of the reports you have access to in Mobius if it was provided by SAO TeamWorks Financials.
14	**How long are the reports available?**	Reports will be available to view, save or print for at least 30 days. The maximum days is still in discussion due to the retention now being on the process instead of by Business Unit. It will be posted on our website a week before going live.
15	**Will there be a differentiation between monthly reports and on-demand reports?**	The differentiation between monthly reports and on-demand reports can be done by looking at the date/time stamp
16	**Am I able to see reports run by anyone in the business unit or am I only able to see the reports I run?**	Yes, you should be able to see reports run by anyone in your business unit
17	**Will the webinar instructions be available in PDF format?**	Presentation slides will be posted after both presentations
18	**The on demand reports normally have an X art the end.**	For now, there is no distinquishable difference with a batch report and an adhoc report with the exception of the date-time stamp.
19	**If I run an ad-hoc report, will others in my agency be able to access it?**	Yes - other users in your agency would be able to access an ad-hoc report, if they have eaccess to the Report Manager
20	**Currently, there are models in Mobius View which allows you to pull out certain information that is exported to an Excel file? Will this process be available?**	No, this function will not be available in Report Manager.
21	**Will there be Job Aids available regarding how to use this module? Where will they be located?**	Yes, the training team will be providing Job Aids regarding how to use Report Manager
22	**How this will this conversion effect the speed of the PS in general?**	This conversion would not have any effect in TeamWorks in general.
23	**Will there be a list of reports available to select?**	All batch reports and ad-hoc reports that your agency has run will be available in Report Manager.
24	**Currently, my Folder option (drop menu) only shows "General", will there be a list after the conversion?**	The reason you only see 'General' in the my folder option is because this is not yet in the production system. You will be able to see general along with business units when this is live.
25	**On a large report, like a CDR with 3000-4000 pages, how will you find a specific department code?**	The best option would be to use 'Ctrl + F' and find a specific department code
26	**Will DFCS Accounting retrieve EFT reports from here?**	No, those reports were provided by another system to Mobius and are not included in the Report Manager.

27	How do you search and find a specific page range and then print?	Go to File-> Print , search for desired page ranges and enter page ranges to print.
28	Currently reports are listed under reports/queries. Will the Mobius conversion have reports available there or will we have to go to Report Manager?	Actually, the most frequently used reports are listed in the Reports/Queries section for that module. There are more reports that can be access through the navigator. The way you run the report for 99% of them has not changed,
29	Is there a way to retreive reports past the expiration date?	No, the best option to keep report past the expiration date is to save the report either on your local drive or in network so that you will have access to the report anytime
30	Will GL Combined Detailed data be pulled based on the date run, or only for closed periods like the current query?	GL Combined Detailed data will be pulled just as it currently is today.
31	Will the reports that are currently being printed and distributed to the agencies still print automatically, or will we be required to print what we need?	The reports will be stored in the Report Manager. It is the agencies responsibility to print and dispersed the number of copies needed
32	Can these reports be converted to Excel?	Only the reports that were converted to Excel in Mobius will be converted to Excel in Report Manager.
33	If batch runs longer than normal and finishing run that day, will the report be available instantly or does it take overnight processing?	Reports are placed on the server as batch is run and individual processes are completed. At that time, all reports will be released to Report Manager.
34	How can I save the report?	Once in the report view page, use the right click functionality and choose 'Save As' option to save report in the local or network drive
35	Will the month reports like the level 4, and all other levels we will have to run ourselves?	Monthly reports will be produced and/or run as before.
36	Can you still schedule reports to run after batch the same as before?	When and how reports are run or scheduled will not change, only where to receive them.
37	When will this go into effect/become active?	Report Manager will be available by the mid-November, 2019
38	Will the Power Point presentation be available online?	Yes, the Power Point presentation will be available online
39	Why did you select LP for the output report and not CSV?	PeopleSoft suggests that output for CSV should be 'LP'. LP is for Line Printer.
40	How do we download the GL04GG as and Excel file?	CSV to Excel conversion will be covered by the Job Aid document

41	**Under the circumstances that we need to run 3 reports at the same time, will these reports run simultaneously and generate at the same time or will they come out at 10 to 20 minute intervals?**	There won't be any difference between now and once new reporting tool is implemented when it comes to how you run the report. However, It would be better to run separately if data comes from same table(s). For any successful report run - it would take 10 to 20 minutes to get the report in the Report Manager.