

# Systemware Content Cloud

Systemware Content Cloud is a secure cloud-based content delivery system that provides agencies access to reports. Systemware is replacing XNET/XTND. The purpose of this document is to explain how to login and access content within Content Cloud.

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### Logging In

Content Cloud does not require any extra software; however, users must be on a state network or on a VPN into the state network. It is accessed through a web browser. Content Cloud Test Portal can be found at <a href="https://test.sysware.nc.gov">https://test.sysware.nc.gov</a>. Once the production portal is available it can be accessed through the URL: <a href="https://test.sysware.nc.gov">https://test.sysware.nc.gov</a>. Once the production portal is available it can be accessed through the URL: <a href="https://test.sysware.nc.gov">https://test.sysware.nc.gov</a>. Once the production portal is available it can be accessed through the URL: <a href="https://test.sysware.nc.gov">https://test.sysware.nc.gov</a>. Log in using your RACF ID and password to the Systemware Content Cloud in either the Production or Testing portal.

(systemware) Content Cloud	Log in to Systemware Content Cloud	
	My user name is:     Password:     LOGIN Remember me?     I need to change my password	

### Navigating the Content Cloud

Once logged on to the Content Cloud home screen you may be greeted with a Help and Tips window. This window introduces you to the Systemware interface. Navigating through this menu introduces you to different icons that are used within the Home Page. You can close the Help and Tips window by clicking the X in the top right corner of the menu.



#### Help

The Help menu is in the top right corner of the Home Page. Hovering over the Help icon allows you four options: Welcome Page Help, General Help, About Systemware, and Show Tips and Hints.

- Welcome Page Help icon reviews each section and icon on the Home Page.
- General Help provides instruction for using the Document Portal.
- About Systemware provides information on Content Cloud User Interface.
- Show Tips and Hints Opens up the Help and Tips Window

The first option within the Help menu changes depending on what page the user is on. This provides the users with specialized support on each page of Content Cloud.



#### Add To My Pages

In order to save a page to the My Pages area, navigate to the page you wish to save. Then hover over the Open New Tab Icon, located in the top right corner, and click Add To My Pages.

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Favorites Navigator	search.908.a.swcsrecentverview	debug:	Reset First Page		
TOOLS	Title: O Alt Name: O Name: O ID: O	All: 🔘	Link: https://test.syswar	e	
Content Extraction	Title:	Alt Name:			
Content View	Folder: /OSC	Name:			
<ul> <li>Scheduled Tasks</li> </ul>					
Scripts	Show ONLY Favorites: Show ALL Versions:	ID:			
ADMINISTRATION	Date:	Format:			
▼ Import & Export	Source:				
▼ System					
	SEARCH CANCEL CLEAR FORM CLEAR RESULTS				
MY PAGES					
GENERAL	Showing 1 - 20 of 133 Results Per Page: 20			View Sty	le: 🔳 🗏 🖯

Once the user selects Add To My Pages, a window will appear asking for a Name and Category. The user can create a category for the user to organize their favorite pages. Users add a category by clicking in the category field and typing in a new category.

Name:	Content Navigator	
Category:	General	

After the user has completed the requested information and clicked Save, the page will be saved, and a direct link will be posted on the user's Home Page.

	0	
	Ts65599 - (Externally defined user Ts65599)	
MY PAGES		0
LOCALCS/OSC		

### **Toggle Left Panel**

The first icon on the top left corner of the Home Page is Toggle Left Panel. Clicking on this icon expands or collapses the left side bar navigation panel.

<b>□ ▲ ◎ ☆ ∅</b>	
Toggle Left Panel	
Content Navigator	
Favorites Navigator	
TOOLS	
Content Extraction	
Content View	
<ul> <li>Scheduled Tasks</li> </ul>	MY PAGES
Scripts	
ADMINISTRATION	
✓ Import & Export	
▼ System	You have not saved any pages to your My Pages area
1111111111	pages here on the home page or in the left panel me

### Home

The second tab to the right in the top left corner is Home. Clicking the Home icon will return the session to the user's home screen. A user's homepage is customizable. The user can organize categories where saved pages are stored and if a user has saved pages, they will display in the My Pages area.



### Find

The Find Icon is used to search for reports. This Find provides you with the options Content Navigator and Favorites Navigator. These options are also available under Find in the Left Navigation Panel. Both options will allow the user to find reports.



## **Content Navigator**

Content Navigator gives the user access to all reports that they can view. Once the Content Navigator is selected, the user then will expand the Navigation folder. This will display the high-level directory. Expanding the directory will display the Agency high-level directories.



These directories will populate only with directories a user has access to view. Some users will have access to more directories and/or reports than other users. Expanding Agency level directories will display subdirectories, and in turn expanding subdirectories displays reports. NCAS reports that the Office of the State Controller promotes are available under the Agency level directory OSC.

The following are a few examples of subdirectories within the OSC Agency high-level directory.

- AKA CMCS Users
- **OPC** Production Region Users in CICSSCCP
- **OPF** Production Region Users in CICSNC23
- **OPU** University Users



NOTE: It is important to remember that all users will not have access to all directories.

Report names utilized within an expanded region directory should appear the same as they were within X/TND or X/NET.



## **Favorites Navigator**

The Favorites Navigator displays a navigation tree of reports marked as favorites.



Users can mark a report as a favorite by navigating to the report, clicking on the Report Options, and selecting Add Report to Favorites.



Once a report is marked as a favorite it will appear in the Favorites Navigation Tree.

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NAVIGATION	Enveriter Novienter	4
FIND	Favorites Navigator	
Content Navigator	Weight Shared For Import     Weight Shared For Import     Weight Shared For Import     Weight Shared For Import	
Favorites Navigator	- 🕅 General []	
TOOLS	Content	
Content Extraction	🖹 1 - OSCOTC SYSWARE 📃 🔨 Favorite	
Content View	🖺 1 - OSCOTC TEST AKA REPORTS 🖌 Reports	SI
<ul> <li>Scheduled Tasks</li> </ul>		
Scripts		
ADMINISTRATION		
<ul> <li>Import &amp; Export</li> </ul>		
▼ System		
		1.1

## Searching for Reports

Report searches are conducted through the Content Navigation Server. In order to perform a search, the user will go to the Content Navigator and click on the high-level directory. Clicking on the directory will populate the Content Server and will provide users with the fields to perform a report search.

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TOOLS	💿 🕵 Script Results	debug:
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	🗉 🎁 JUS	Showing 1 - 20 of 439 Results Per Page: 20 🔻 View Style: 🔳 🗐 🖯
	+ 🛍 LAB	<< 2 3 4 5 6 7 8 9 10 >

Content Cloud offers several fields to search for reports:

- Title
- Alternate name
- Name
- Form ID

#### Example: GL820 Report Search

This example will explain how to perform a simple search for the General Ledger Batch Proof Report (GL820).

1. In the Title Field enter GL820.

search.908.a.swcsrecentverview	debug:
Title: O Alt Name: O Name: O	ID: O All: 🔘
Title: GL820	Alt Name:
Title: GL820	Alt Name:

2. Click Search.

Show ONLY Favori	tes: Show ALL Versio	ID:
Date:	•	Format:
Source:		
		т
CANCEL C	CLEAR RESUL	

3. This search will return results for the latest version of reports GL820, or General Ledger Batch Proof Report.

		Title:	GL820					Alt Name:					
	Fo	lder:						Name:					
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ear	<b>RCH</b> g 1	4 of 4	CANCEL CLEA Results Per Page: 21 Title	AR FORM	CLEAR	Format	LTS	Folder	Source	G	ID	View Style: 🔳 🖡	3 8 DSIC
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ear owin	асн 91	4 of 4	CANCEL CLEA Results Per Page: 2/ Title OSCOPC GL820-1 GL/FICS REPORTS OSCOTC GL820-1 GL/FICS REPS	Date/Time 11/15/2019 08:25:00 12/10/2019 11:13:00	CLEAR Pages 2242 1173	RESU Format TXT TXT	Name OPGJ OTGJ	Folder /OSC/OPC /OSC/OTC	Source OTCXPTRM OTCGL820	CS TEST XPTR (SYSW) TEST XPTR (SYSW)	ID OPGJ OTGJ	View Style: E	D
EAD owing	RCH	4 of 4	CANCEL         CLEA           Results Per Page:         2/           Title         0SCOPC GL820-1           GL/FICS REPORTS         0SCOTC GL820-1           GL/FICS REPORTS         0SCOTC GL820-1           GL/FICS REPTS         0SCOTC GL820-1           SIM AUDIT RPT         NUM RPT	Date/Time 11/15/2019 08:25:00 12/10/2019 11:13:00 12/10/2019 11:13:00	CLEAR Pages 2242 1173 4	Format TXT TXT TXT	Name OPGJ OTGJ OTHM	Folder /OSC/OPC /OSC/OTC /OSC/OTC	Source OTCXPTRM OTCGL820 OTCGL820	CS TEST XPTR (SYSW) TEST XPTR (SYSW) TEST XPTR (SYSW)	<b>ID</b> ОРБЈ ОТБЈ ОТНМ	View Style: E	D
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**NOTE:** All versions of the report will not appear unless the user checks the toggle box Show ALL Versions and click SEARCH.

Title:	GL820	
		Contraction of the second
Folder:		
Sho	w ONLY Favorites:	Show ALL Versions:

#### **Certification Report Search**

Certification reports, like BD701, BD702, BD725, and BD800 are all grouped under the fiscal year. These reports are placed into versions; therefore, the report version corresponds to a certification period. For instance, Version 1 contains certification reports for period 1, July. Version 2 contains certification reports for period 2, August, etc. The following steps explain how to search for a certification report and save a report search.

1. Enter the report title FY2020 BD701 REPORT in the Title Field, click search.

Navigation/SYSW											•
Content Navigator		A Content Server SYSW								1	
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• SYSW • MADM		Folder: Show ONLY Favorites:	Show ALL	Versions:	Name:						
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2. Once results are returned, click the action menu for the report. This menu then provides you with the option to Show Versions.

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	search.908.a.s	wcsrecentve	rview			debug:						
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3. Click Show Versions.

4. All Versions of the FY2020 BD701 Report Results will populate in the window.

Show	Ven	sions											
- *	Cont	tent Sei	rver Version -	- SYSW									
		searc	h.902.a.swcsv	version				del	bug: 🗌				
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		_											
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		~	10/23/2019 13:06:00	10/23/2019 13:06:00	11	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047F3E60067
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	-	1	10/23/2019 13:05:00	10/23/2019 13:05:00	9	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047F1380067
		~	10/23/2019 13:05:00	10/23/2019 13:05:00	8	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047EF550067
		1	10/23/2019 13:05:00	10/23/2019 13:05:00	7	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047ECB70067
		1	10/23/2019 13:05:00	10/23/2019 13:05:00	6	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047EAD00067
		1	10/23/2019 13:05:00	10/23/2019 13:05:00	5	TXT	1	1	TS65P55				E3E2F6F5D7F5F5400119296F0047E85B0067
		1	10/23/2019 13:05:00	10/23/2019 13:05:00	4	TXT	2792	4678	TS65P55				E3E2F6F5D7F5F5400119296F0047E2650067
	-	1			_	1. 1.				1			

5. The next steps will explain how to save the report search so all versions will appear when it is recalled. Once a search is saved it will appear in the left navigation panel. Saving searches allows the individual to have quick access to a report and all versions of that report that they generate often.

6. Click the Save Search Icon in the top right corner of the Content Server.

Show Ver	sions tent Se	rver Version -	- SYSW										
	searc	h.902.a.swcsv	version				del	bug: 🗌			14		
Title	osco	DTC FY2020 B	D701 REPORT	5			Alt Na	me:					
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Source													
SEARCH Showing 1 -	12 of 12	ANCEL	CLEAR FORM	<b>C</b>	EAR RE	SULTS				View St	yle: 📔		
		Version Date/Time	Capture Date/Time	RIN	Format	Pages	Size (KB)	Source	Filename	Upload Flag	Hold	DSID	^
	~	10/23/2019 13:06:00	10/23/2019 13:06:00	12	TXT	1	1	TS65P55				E3E2F6	
	1	10/23/2019 13:06:00	10/23/2019 13:06:00	11	TXT	1	1	T <mark>S</mark> 65P55				E3E2F6	

7. Create a name for the saved search and place it within a category. Then click SAVE.

Show Ver	sions									E			
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Title	OSCO	TC FY2020 B	D701 REPORT	S			Catego	ory: Gene	ral				
Folder	/OSC/	OTC						SAVE					
Date			- [				For	nat:					
Source													
SEARCH	C/	ANCEL	CLEAR FORM	CI	EAR RE	SULTS							
Showing 1 -	12 of 12	Results Per P	age: 20							View St	yle: 🔳		
-		Version	Capture	RIN	Format	Pages	Size (KB)	Source	Filename	Upload Flag	Hold		
		Date/Time	Date/Time							-		DSID	

8. Once the Search has been saved it is shown in the left navigation panel under Saved Searches.



9. Clicking on the Saved Search in the left navigation panel will open the saved report search and display all versions of the report.

- *	Cont	ent Serv	ver Version -	- SYSW							E	1		-
		search	.902.a.swcsv	version				del	bug: 🗌					
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Fo	older:	/0SC/0	OTC					Na	me: OTEI	N				
1	Date:			•				For	mat:					
So	urce:													
SEA	RCH	CL	EAR FORM	CLEAR	RESULT	s					View St	vle: 🖛		
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		-	13:06:00	13:06:00	12	TXT	1	1	TS65P55				S. Control	
				13.00.00									E3E2Fé	
		1	10/23/2019 13:06:00	10/23/2019 13:06:00	11	TXT	1	1	TS65P55				E3E2F¢	

### **Opening a Report**

After locating a report, the user can open and view the report to see their agency's data. Users also will be able to perform Queries. It is important to remember that users will be able to see only the reports they have security to view.

1. For this training document, search for the report FY2020 BD702 REPORTS All Versions, then select version 3.

	Title: F	Y2020 BD702	REPORTS			Alt N	lame:					
	Folder:					N	lame:					
	Show	ONLY Favorite	s: 🗌 Sho	w ALL Versi	ions: 🛛		ID:					
	Date:		- [			Fo	rmat:					
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	-											
SEAR	CH CA	ANCEL CL	EAR FORM CI	EAR RESU	LTS							- 23
SEAR	CH CA	ANCEL CL	EAR FORM CI	EAR RESU	ILTS					v	iew Style: 🗐 🖡	
SEAR Showing	CH CA	Results Per Page: Title	EAR FORM CI 20 T Date/Time	EAR RESU	Format	Name	Folder	Source	G	V	iew Style: 🔳 🖡	DSID

2. Click the Show Menu Icon located next to the report title.



3. From the menu options, click view. This will open the report and allow the user to view the data.

	Title	Date/Time	Pages	Format	Name	Folder	Source
	OSCOT C	1010				1055.10	
	View	1:00	1170	TXT	OTEQ	TC	OTCDSXPT
	View in New Wir	ndow					
_	Show Versions						
-	Add Report to Fa	avorites 🕨			-	-	
	Notes						
	Download	1 ×					
506000	Select						

- 4. The report FY2020 BD702 Report will display to the right of the left navigation panel.
- 5. To close the report, navigate to the top right corner to the CLOSE icon.

II 🔺 @ 🕆 🕸	Content Navigator Viewer		r 😃 Logout ts65s9	9 Settings Help
NAVIGATION FIND	Title:OSCOTC FY2020 BD702 REPORTS Date:10/23/2019 12:31:00			CLOSE
Content Navigator	🔳 Zoom: 100% ——————————————————————————————————			N
Favorites Navigator	Page 1 / 164 Lines 1-41 of 41 Find Text	Q		
TOOLS	RMDSTD19 CERTIFIED ON 08/16/2019	ST	ATE OF NORTH (	
Content Extraction	BD702-01	MON	THLY REPORT OF	APPROPR
Content View	190 DEPARTMENT OF PUBLIC SAFETY		FOR THE PERIC	DD ENDING
Scheduled Tasks	BUDGET CODE: 04555	ET UN	ALLOTTED	ALLOT
ADMINISTRATION	EXPENDITURES	.00	.00	
Import & Export	REVENUES	.00	.00	
System	EXCESS OF EXPENDITURES	.00	.00	

### Viewing a Report

Once a report is opened the user is provided with a menu bar of Document Navigation Tools.

Title:OSCOTC FY2020 2	2 REPORTS Date:10/23/2019 12:31:	4	6
Zoom: 100%		1 a C C D D Page 1 /164 Lines 1-41	of 41 Find Text
1	3	5	

1. The first icon on the far left of the menu is the Action Menu. Clicking this Icon allows you to view all the actions that can be performed on this document. The actions available in the menu are listed below.



- **Query**: a sub menu allows you to search for specific content in the document using the Content Query or perform batch queries on the document using the Batch Query action.
- **Transform**: this action allows you to transform the document into a PDF or to open the Apply Content View.
- $\circ$  **Deliver**: gives the user the ability to email or deliver the content in CS Drivers.
- **Download**: allows the content to be downloaded in its native format, TXT format, or PDF format.

- **Analyze**: opens the Content Analyze drop-down panel, providing the option to create a content extraction based on the document or update an existing extraction template.
- 2. The second tool is a Zoom Slider. This tool allows users to slide the button to the left to zoom out of the document or slide to the right to zoom in the document.



3. The third set of tools on the Document Navigation Toolbar is the Notes. These tools allow you to attach "Sticky Notes" onto any document or image.



- **Expand All Notes** is the first tool in within the notes. This command expands all sticky notes within the document.
- **Minimize All Notes** is the second tool within the notes and provides the user with the command to minimize all sticky notes in the document.
- Show/Hide All Notes 🔤 toggles all sticky notes in the document to be shown or hidden.
- Add Note to Document 🚨 command adds a new sticky note to the current document.
- 4. The fourth set of tools within the Document Navigation Toolbar are Viewer Tools. These tools are available only within the Document Viewer.



• **Ruler Toggle** The Ruler Toggle provides the user with an information box below the Ruler Toggle icon that displays the row number and column number the user is hovering above.



• Select Text III transitions the cursor to a cross hair allowing the user to left click and drag an orange box around text, releasing the left mouse button will create a popup text box. This text box can be printed using the print icon on the bottom left corner of the text area or closed by left clicking the 'click to close' in the bottom right corner of the popup.



• **Green Bar** icon toggles the row backgrounds within the document as all white or alternating green and white. This feature can enhance the visibility and legibility of a document.

Title:OSCOTC FY2020 BD701 REPORTS Date:10/23/2019 13:05:00	CLOSE
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• **Print Current Page** icon opens the current view in a new document viewer window. This window provides users the option to download or print the document page.

□ <b>↑ ↓</b> 1 of 1		-	+ Automa	itic Zoom 🗘		53	8 8 1	»
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REVENUES	.00	.00	.00	2,779,864.96	8,459,412.70	8,459,412.70	8,459,412.70-	
OVER (UNDER) REVENUES PER BD701	.00	.00	.00	.00	.00	.00	.00	

5. The fifth set of tools is the Page Navigation Tools. These tools allow the user to access different pages of the report.



- **Go To First Page** button takes the user back to the first page of the document they are viewing.
- **Go To Previous Page I** button takes the user to the previous page of the document.
- **Go To Next Page** button takes the user to the next page of the document.
- **Go To Last Page** button takes the user to the very last page of the document.
- Page Page 1 / 188 icon shows the current page out of all the pages of the document.
- Lines 1-41 of 41 icon displays the number of rows that are on that page of the report.

6. The sixth tool available on the document navigation toolbar is Find Text

Find Text

. This field allows a user to search for specific text within a document. For instance, if a user is searching for the text BD701-03, then they click the search icon within the field the document will return results that match the text. The example below shows the pop up listing the number of times the text was found and allows the user to use the next and previous arrows to navigate through all instances of the text. The text within the document is highlighted in green. The user can close the find text search by left clicking the close button beside of the next and previous arrows.

Title:OSCOTC FY2020 BD701 REPORTS Date:1	0/23/2019 13:05:00	Previous	Next
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BD701-03 HOSPITALS 06095 UNC HOSPITALS-INSTITUTION	STATE OF NORTH CAROLINA GENERAL L AGENCY MANAGEMENT BUDGET REP FOR THE PERIOD ENDING SEPTEMBE	GER GYGTEN ORT R 30, 2019	Close
	SUMMARY BY ACCOUNT		
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### Performing a Query

Queries can be performed using the first tool, the Action menu, on the document navigation toolbar. Users can create a query on the indexes defined for the report, or they can create a text query. The example below will explain each step for a user to perform a query.

- 1. Left click on the Action menu to open.
- 2. Navigate to the first option Query and left click to open a query.

Title:05	SCOTC FY2020 BD70	2 REPORTS Date:10/23/2	019 12:31:00			
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19 BU	Deliver Analyze	C SAFETY		FOR THE PERI	OD ENDING OCTOBER	R 31, 2019
FU		_	BUDGET	UNALLOTTED	ALLOTTED	CURRENT MONTH
EXPI	ENDITURES		.00	.00	.00	1,113.33

3. Below the document navigation toolbar, a content query box opens.

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🤄 Add a new query line.	
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4. The query box defaults to one query line. Users can click the drop-down box on the query line to view the indexes for the opened report. Users also can use the - -Text - - to create a query search for text that is not established as an index.



5. After selecting an index, like FUND (FUND\$), the user then can choose an operator from the second drop down box. The available operators are equals (=), not equal (! =), less than (<), less than or equal to (< =), greater than (>), greater than or equal to (> =), In, and Not In.

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6. These operators will compare the index to the criteria the user places in the third Query Line field.

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7. The example below queries results for the FUND (FUND\$) index to less than or equal to 2250. After clicking apply, the user can see only the 76 pages where the FUND index is less than or equal to 2250.

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8. Users can add additional query lines to narrow the report even further. Click + Add a new query line.

NAVIGATION	Title:OSCOTC FY2020 BD702 REPORTS Date:10/23/2019 12:31:00
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Content View	+ Add a new query line.
Scheduled Tasks	Add a new query.
Scripts	APPLY FIND FIRST CLEAR

9. The second query line allows the user to choose if they want the query to apply both criteria to each page analyzed or if the user wants to look at pages that only meet one or the other criteria. This is done by clicking the AND or OR button.

Content Query Timeout 30 🗢 seconds 🗌 Allow parentheses	Content Query Timeout 30 🖨 seconds 🗌 Allow parentheses
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Add a n query line.	Add a w query line.
+ Add a new query.	+ Add a new query.

10. Select the index to perform the query, then select the operator and type in the criteria to query. For instance, add FUND index is greater than 2231. Once the index, operators, and criteria have been input, then click Apply. Applying the second query refines the results down to three pages.

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### Downloading a Report

Reports can be downloaded in three different formats: XLS, TXT, and PDF. XLS will download to EXCEL, TXT will download the file as a text file, and PDF will download in Adobe ACROBAT Reader. All these options are available in the Action Menu of the report.



The following steps will explain how to Download a report in the XLS format.

- 1. Select and open a report. This example uses report BD702 Version 3 report with the following queries applied Fund <= 2250 and Fund >=2231.
- 2. Click on the Action menu from the Document Navigation Toolbar. Then select Download and click XLS.

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Col	Transform	seconds Allow parentit	neses
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- Ai	dd a new query line.		
APPI	LY FIND FIRST	CLEAR	
RMD BD7	SID14 CERT 01-01	IFIED ON 10/08/2019	STATE OF NORTH CAROLINA GENER AGENCY MANAGEMENT BUDY

3. The Download Range pop up window will appear. This window allows the user to select the pages they wish to download. The user sets the starting page with the first field. In the second field the user sets the number of pages to download from the starting page. For instance, if the user sets the Start page at 1 and then sets the max page at 2, only pages 1 and 2 of the report will download. Once the user sets the range, they must hit Download.



4. Another pop-up window will appear, prompting the user to choose to open the file with a specific program or Save the File. Once the option is selected, the user can click OK. For this scenario, we will open the file with Microsoft Excel.

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5. When Microsoft Excel opens the XLS file, it places all data in column A.

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6. To separate the data into columns, click A to highlight the entire column A.

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7. Click Data from the top toolbar.

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8. Click Text to Columns.

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3 190 DEPARTMENT OF PUBLIC SAFETY	FOR T	THE PERIOD ENDING OCTOBER	31, 2019		RUN DATE: 10	/22/2019
4 BUDGET CODE: 24550						
5 FUND : 2231						
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9 EXPENDITURES	.00	.00 .00	1,113.33	1,113.33	12,532.84	12,532.84-
10 REVENUES	.00	.00 .00	.00	.00	.00	.00
12 EXCESS OF EXPENDITURES						
13 OVER (UNDER) REVENUES PER BD701	.00	.00 .00	1,113.33	1,113.33	12,532.84	12,532.84-
14						

9. The Convert Text to Column Wizard window will pop up. The Wizard will help in aiding the process of reformatting your data into separate columns. In this case the data is already separated out with spacing between each field, so select the fixed width option, and click NEXT. If the data was separated by commas or tabs, the Delimited option would reformat the data correctly.

onvert Text to Columns Wizard - Step 1 of 3	?	×
ne Text Wizard has determined that your data is Fixed Width.		
this is correct, choose Next, or choose the data type that best de	scribes your data.	
Driginal data type		
Choose the file type that best describes your data:		
O Delimited - Characters such as commas or tabs separat	te each field.	
Fixed width - Fields are aligned in columns with spaces	between each field.	
Preview of selected data:		
Preview of selected data:	STAT	E A
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10. The next wizard step allows the user to define which columns are text and gives the option to exclude columns. Move through the data preview using the scroll bar to verify that the following are broken up with a column break: Description, Budget, Unallotted, Allotted, Current Month, Quarter to Date, Year to Date, and Unexpended.

is screen lets you set field widths (column brea es with arrows signify a column break.	aks).			
To CREATE a break line, click at the desired p To DELETE a break line, double click on the li To MOVE a break line, click and drag it.	osition. ne.			
ata <u>p</u> review	40	<u>50</u>	60	4
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11. Once each data column has been confirmed in the wizard, click Finish.

Convert Text to Columns Wizard - Step 2 or 5			? ×
This screen lets you set field widths (column bre Lines with arrows signify a column break.	aks).		
To CREATE a break line, click at the desired p To DELETE a break line, double click on the li To MOVE a break line, click and drag it.	osition. ne.		
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12. The Text to Columns Wizard will apply the new columns to the data. The columns then can be expanded, decreased, and modified in Excel.

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### **Emailing with CS Drivers**

Reports can be emailed to others using the Deliver option from the Action menu. After clicking on the action menu, the user then will go to the Deliver option and click CS Drivers.

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The CS Drivers are set up based on the user's XPTR. These Drivers are available by clicking on the Dropdown box. The user then can select the driver from the list.

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To send the report as an email, select the driver Email Reports, No Separators. Then complete the email information.

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Once the email information is completed, the user can click Submit.

**NOTE:** If a user would like to Print a report, this can be completed using the Print Reports, No Seperator, Batch Job Driver from the dropdown menu.

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