

When wanting to obtain information out of JDE, for example a Total Job Cost Report or a Purchase Order, the steps are basically the same:

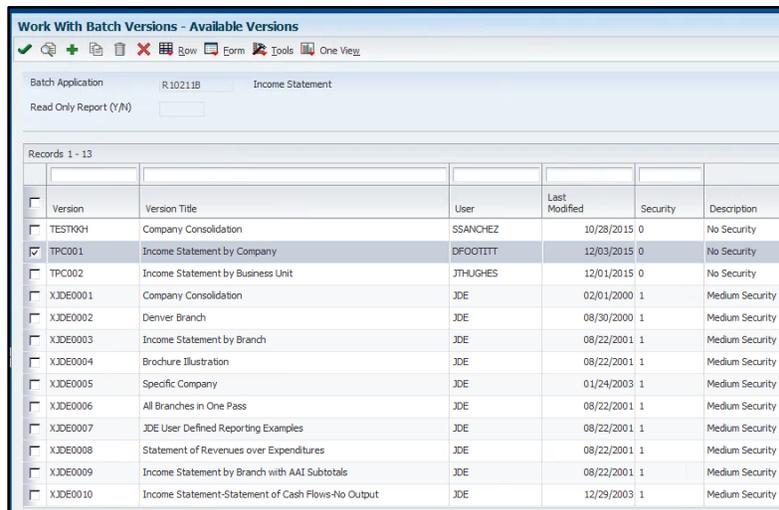
- Click on the Report name
- Select Version (if applicable)
- Input your data selections
- Run your Report
- Save and/or Print your report

As an example, we will run a “Simple Income Statement” Report from the **General Ledger Main Menu**, under **Month-End Financial Reports**.

1. Click the report you want to run.

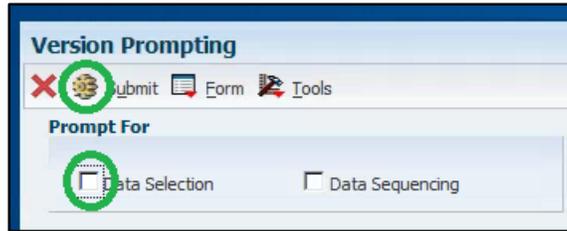


2. The next screen displayed – Work with Batch Versions - has the different versions of the Report that can be run. Select the Version of the report by scrolling through the versions, or by entering the version number in the QBE box and clicking “Find” on the top left of the screen (*in the example below, we are running Version TPC001*). Click the Green Checkmark in the upper left corner of the screen.



## RUNNING A REPORT

- Click the “Data Selection” box and then click on the Submit symbol. (*Click on the actual symbol and not the word “Submit”*)



- The default data selection options are shown below.

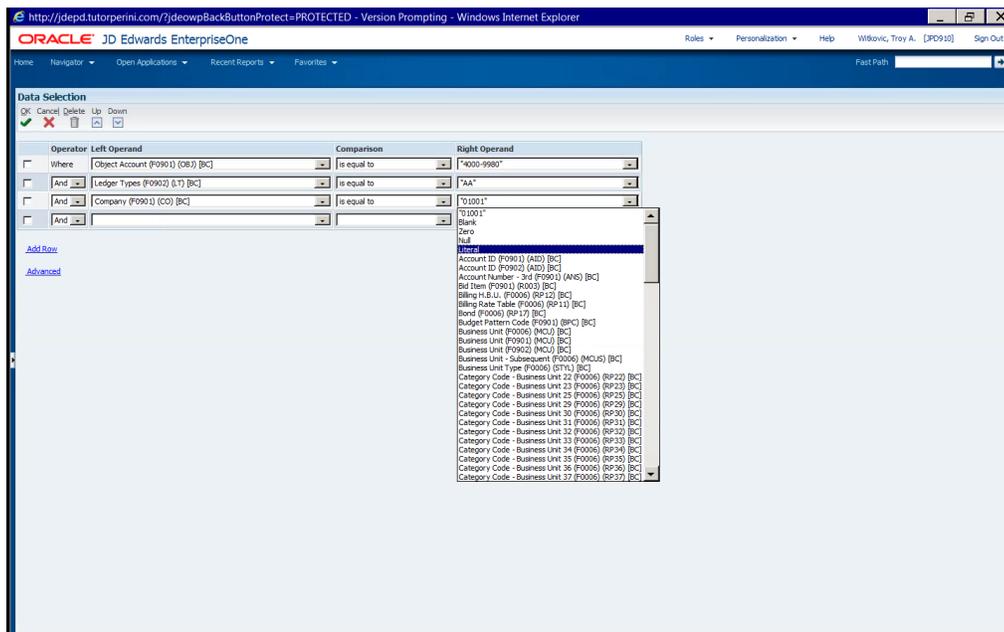
**Data Selection**

OK Cancel Delete Up Down

	Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where	Object Account (F0901) (OBJ) [BC]	is equal to	*4000-9980*
<input type="checkbox"/>	And	Ledger Types (F0902) (LT) [BC]	is equal to	*AA*
<input type="checkbox"/>	And	Company (F0901) (CO) [BC]	is equal to	*01001*
<input type="checkbox"/>	And			

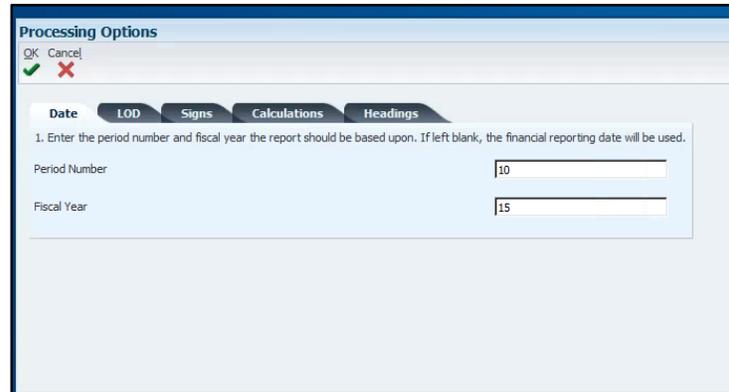
[Add Row](#)  
[Advanced](#)

- Change the Right Operand on the appropriate line from “Null” to “Literal” by using the drop down menu (*in the example, the appropriate line is #3, as we’ll run the Report for Company 02601*).



## RUNNING A REPORT

- A new selection page will come up where you should enter some Processing Options. If you are running a Total Job Cost report it would be your job number (*Note that there are tabs where you can enter a range of job numbers or a choice of job numbers to include on the report.*). If printing a Purchase Order it would be your PO Number. Since our example is an Income Statement, JDE is asking for Date type processing options (*Period = 10, Year = 15*). Then Click the Green Checkmark.



**Processing Options**

OK Cancel  
✓ ✗

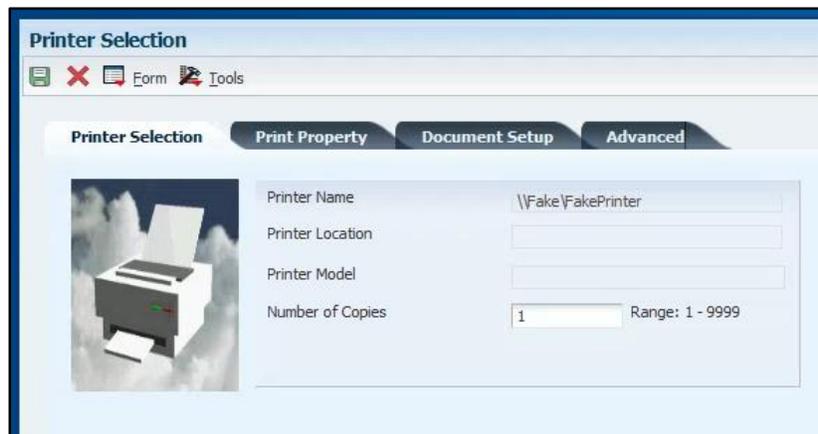
**Date** LOD Signs Calculations Headings

1. Enter the period number and fiscal year the report should be based upon. If left blank, the financial reporting date will be used.

Period Number

Fiscal Year

- NOTE:** The processing option from the last person to run the report will still be entered in the data fields. Make sure you enter the correct data for information you are seeking.
- At the Printer Selection Screen, click the “Save” button to the top left of the screen.



**Printer Selection**

Form Tools

**Printer Selection** Print Property Document Setup Advanced



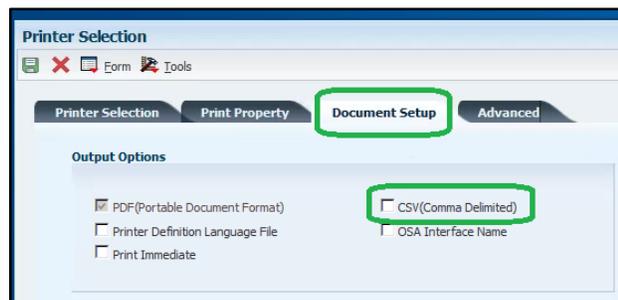
Printer Name

Printer Location

Printer Model

Number of Copies  Range: 1 - 9999

- NOTE:** If you want an MS Excel type document, go to the Document Setup Tab and select “CSV (Comma Delimited)”



**Printer Selection**

Form Tools

**Printer Selection** Print Property **Document Setup** Advanced

**Output Options**

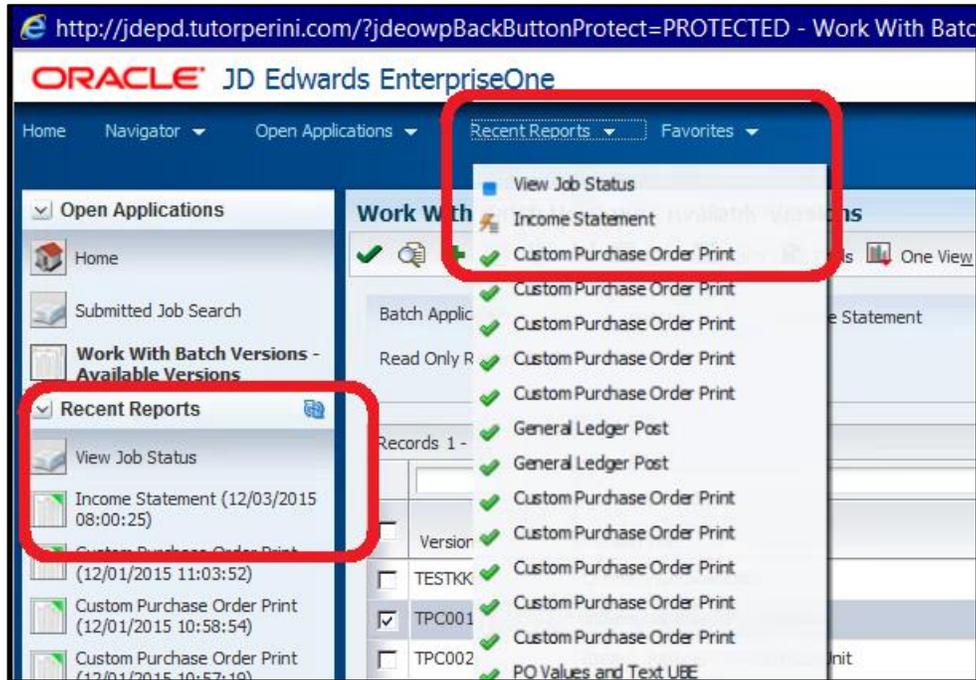
PDF (Portable Document Format)  **CSV (Comma Delimited)**

Printer Definition Language File  OSA Interface Name

Print Immediate

## RUNNING A REPORT

- After the Report runs, you will be back on the “Work with Batch Versions” screen. Find the Report in the Carousel section using the “Recent Reports” menu to the left side of your screen, or along the very top of your screen under Recent Reports.

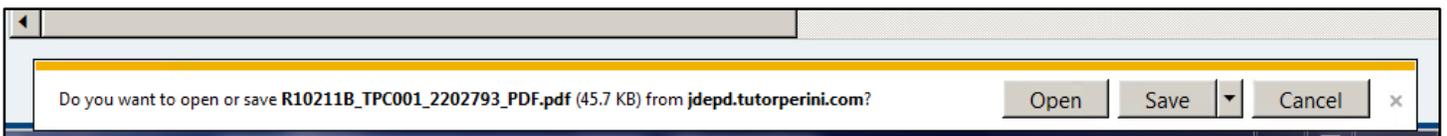


- NOTE: If the Report has not completed running, DO NOT ATTEMPT to open the Report, as it will provide an error or provide a “Blank” report. You can determine if the report has complete by:
  - o Carousel icon will be Blue (processing) instead of Green (Done).
  - o Recent Reports icon will be a Lightning Bolt, instead of a Green Check.

- When you select the report, it will open in PDF. You can either print it, or save to your desktop. A timesaving option is to right click on the pdf and e-mail it to your inbox.

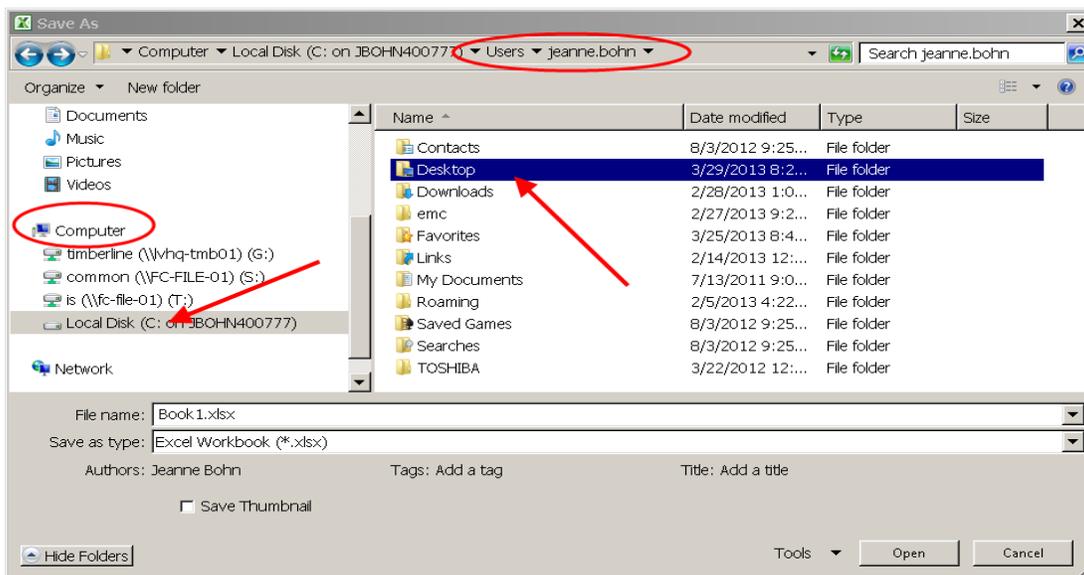
The screenshot shows the 'Submitted Job Search' window. The table below lists the reports and their details.

View Output	Print	Report Name	Version Title	Job #	Job #	Status	Status Details	User	Date Job Submitted	Time Job Submitted
<input type="checkbox"/>		Income Statement	Income Statement by Company	R.10211B_TPC001_2202793_PDF	2202793	D	Done	TWITKOVIC	12/03/2015 08:00:25	
<input type="checkbox"/>		Custom Purchase Order Print	PO Print - OJ - Inital Order	R.5643300_O30001_2195087_PDF	2195087	D	Done	TWITKOVIC	12/01/2015 11:03:52	
<input type="checkbox"/>		Custom Purchase Order Print	PO Print - OM - Inital Order	R.5643300_OM0001_2195052_PDF	2195052	D	Done	TWITKOVIC	12/01/2015 10:58:54	



11. To save to your desktop:

- After you Click “Save As”, you will see the following box:



- Select “Local Disk (C:)” under the section titled **Computer** on the left side of the box
- Go to **Users** folder on the right side of the box.
- Select your **Username** folder on the right side of the box (firstname.lastname)
- Select **Desktop** folder on the right side of the box. This folder is your computer’s desktop.
- Click the Save button to save the document to your desktop.