

## How to Run Reports

Pathway Net has standard reports that can be used to gather information about transaction activity, cardholders, merchants and allocation. Documentation about the report is available by clicking on the **Report Name** field.

Use the following procedures to run and download a report:

1. In the menu bar, click on **Requests** and then on **Reports**. The **Reports: Select** tab appears.

Number	Report Name	Cn
RPT119	Diverted Activity Report	System
RPT120	Cardholder Statement (Individual Bill)	System
RPT121	Cardholder Statement (Central Bill)	System
RPT122	Cardholder Dispute Form	System
RPT123	Statement Container Status	System
RPT130	Approving Official Summary	System
RPT135	Transaction Summary By Unit Data File	System
RPT136	Transaction Summary By Card Data File	System
RPT150	Allocation Analysis Report	System
RPT151	Allocation Analysis Data File	System
RPT155	Transaction Summary Report	System
RPT161	Transaction Detail Report	System
RPT170	Transaction Detail Data File	System
RPT173	Cash Advances/ATM Usage Data File	System
RPT312	Expense Report	System
RPT313	Expense Envelope Unassigned Transactions	System
RPT314	Expense Envelope Summary	System
RPT315	City Pairs/Fare Basis Codes Report	System

2. Select a report from the report number column and click on **Next**. Depending on the report you selected, you will now proceed through several views where you can specify the report's options such as date ranges, hierarchy levels and/or cards to include.
3. When finished specifying all report options, click on the **Run Report** button. The report is listed in the **Request Log** tab when complete.

RPT155: Transaction Summary Report

Include Card Totals.

Select the output format type for your report.  
Rich Text Format (RTF) RTF format is supported for this report.

Check for email notification.

To: ex\_idoe@procard.com,jsmith@procard.com

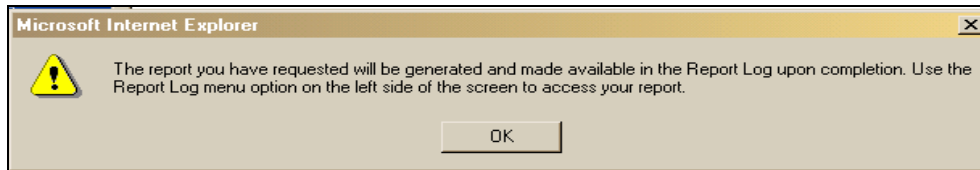
Message: This report was generated by ProCard Report Generator.

Password protect the email attachment:  
Password: \_\_\_\_\_

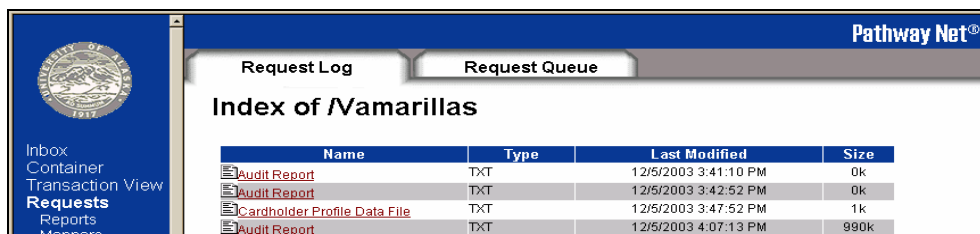
Selected Options:	Option	Selected Value
Date		Posted Billing dynamic date range: Current Cycle 11/16/2003 to 12/15/2003
Hierarchy		Processor Hierarchy, Start Lvl: 1, End Lvl: 1, Units: ProCard Generated
Include Subordinate Units Totals		Yes

**Save Run Report Back Cancel**

- When you click the Run Report button the following messages appears. Click **OK** to continue.



- To review the report in the log window select **Requests** from the menu bar and click on **Log**. The **Request Log** tab appears. The report **Type** of TXT allows you to download the file or copy and paste into Excel.
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- To view the report left click on the hyperlink to the report. To print the report either select your printer icon or go to **File** then **Printer**.
- To download the report to your desktop, right click on the hyperlink to the report. A drop-down list appears.
- Select **Save Target As** from the drop-down list. The **Save As** window appears.
- Enter a file name for the report and click on the **Save** button.