CYMS – Reporting

Vermont Systems CYMS 3.1 Training

07/7/2022

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Logging In and Navigation

Signing in to the RecTrac 3.1 CYMS

The newest version of CYMS is a module within the web-based RecTrac 3.1 platform. Vermont Systems recommends using the Chrome or Firefox browser to access RecTrac 3.1.

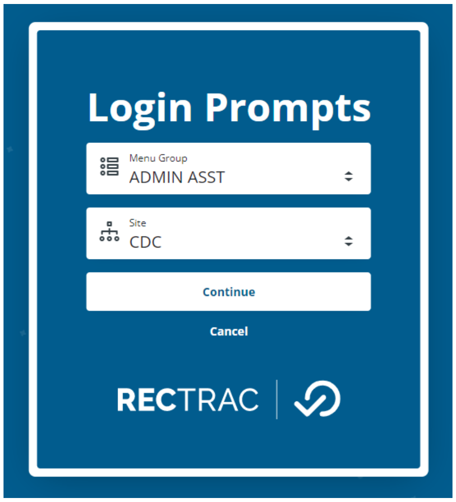
Username: Your Army email alias*

*The alias is everything before the @army.mil

Password: password

Please Note: *You're welcome to change your password. You'll be able to do this by clicking on the User Details section of the sidebar menu.*

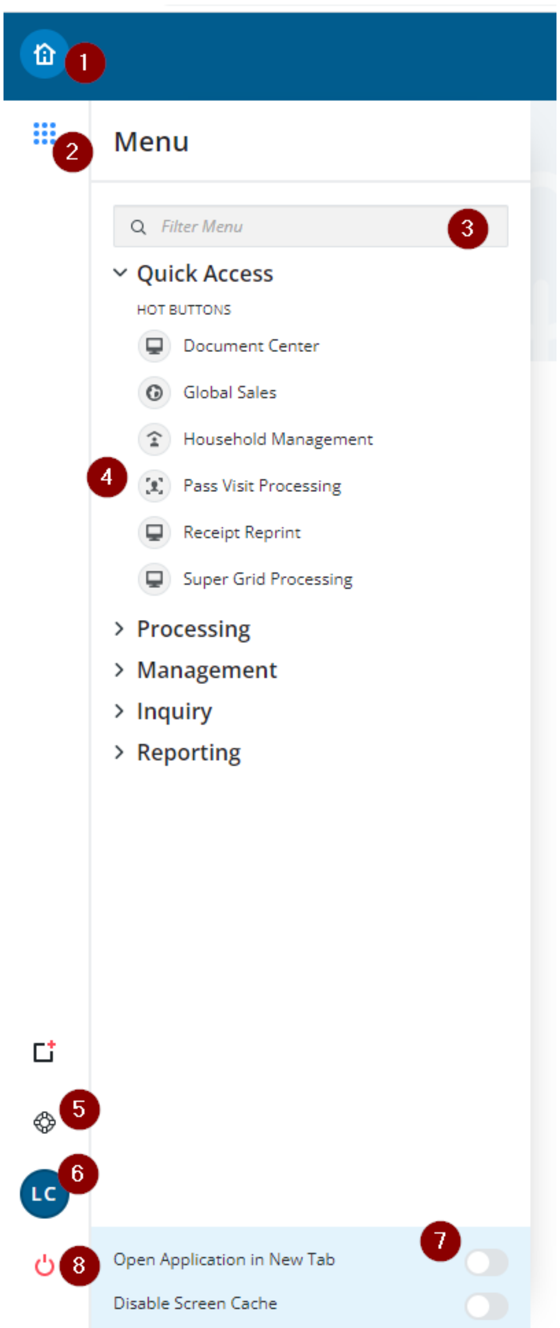
For this training, please sign in using the **Admin Asst** user group and **CDC** site.



When prompted, please leave your starting cash at $0.00 and continue. The PCS Admin user group is configured to start a transaction batch when you log in.

The RecTrac Menu

Access to all RecTrac 3.1 programs and components is done through the menu on the left side of the screen. To open your RecTrac menu, click on the waffle (2) in the upper left.



Menu Components

1 – **Home Button**: Use this button to take you back to the home screen where you can see all of your favorites.

2 – **Waffle**: Use this button to expand the menu and see the menu buttons.

3 – **Menu Search**: Type in the name, or partial name, of any menu button and it will pop up below.

4 – **Menu Buttons**: All the components a user has access to will show as menu buttons. Click the menu button to open the target program.

5 – **Support Button**: Access the in-application help from here.

6 – **Session Information Button**: This button should show your own initials. Click on it to see the Username, User Group, Site, Drawer Number, and Batch you are currently logged into. This is also where you change your password.

7 – **New Tab Slider**: Turn on the slider before clicking a menu button if you already have that program open and you want to open a second instance.

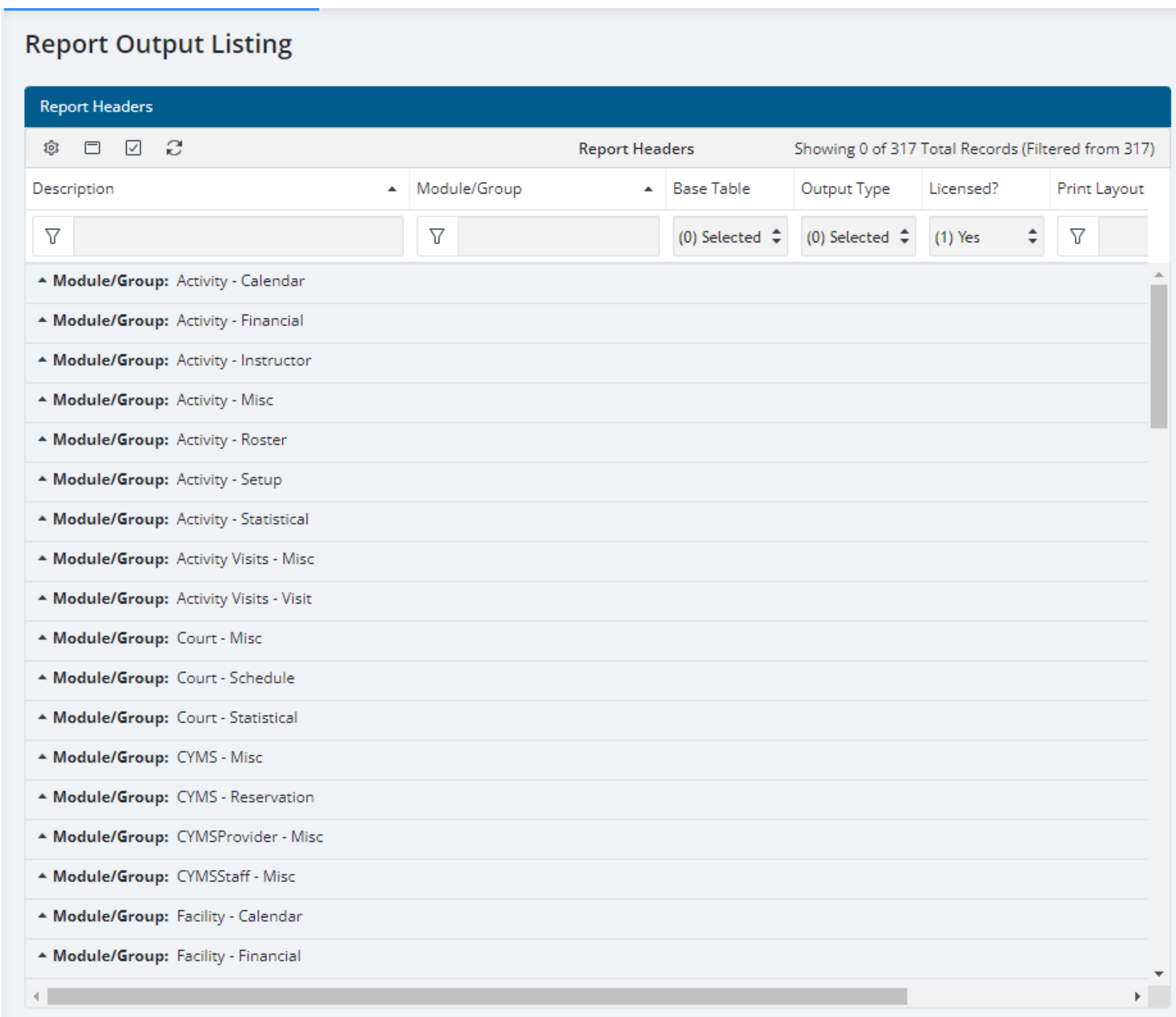
> ***For Example:*** *A user can have Household Management open, and using this slider, open a second tab of Household Management so they can work on two households at once.*

8 – **Logout Button**: Click this button to log out. When you do, the system will prompt you to close your batch.

Finding the Correct Report

Report Output Listing

Click on **Report Output Listing** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Report Output Listing button will launch the Report Output Listing program in a new panel. This program opens to a screen that shows report categories sorted alphabetically.



To find the correct report, navigate to the correct category and click on it to open it. When you open the Report Category you will see all the available reports under that category.

Module/Group: Activity - Roster

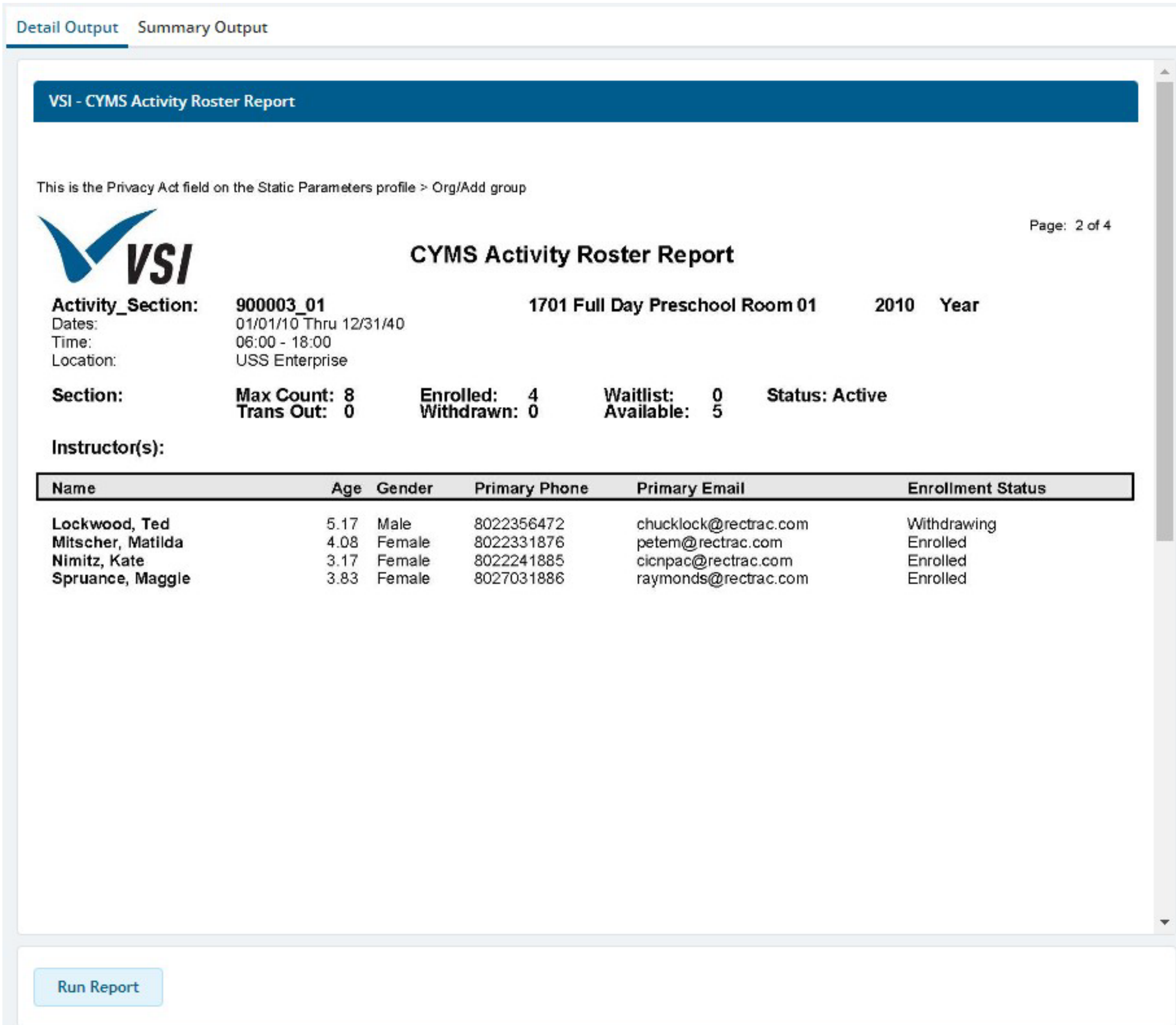
VSI - Activity Birthday Grade Report	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Activity Medical Roster	Activity - Roster	SADetail	VSI Standard	Yes	Landscape
VSI - Activity Roster Fees Report	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Activity Roster Report	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Activity Roster Report (Enroll by Day)	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Class Attendance Worksheet	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - CYMS Activity Roster Report	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Daycare/Camp Attendance Workseet	Activity - Roster	Custom	VSI Standard	Yes	
VSI - Household Roster Detail Report	Activity - Roster	SADetail	VSI Standard	Yes	Landscape
VSI - Household Roster Fees Report	Activity - Roster	SADetail	VSI Standard	Yes	Portrait
VSI - Household Roster Listing Report	Activity - Roster	SADetail	VSI Standard	Yes	Landscape
VSI - Player Rating Cards	Activity - Roster	SADetail	VSI Standard	Yes	Portrait

Please Note: *You can use the Description field at the top of the report output listing screen to search for a report. This field is set to "contains" by default, so you can search for one or more keywords. For example, I search the description field for the word "CYMS" the DataGrid will filter down just to report groups that have reports that contain the word CYMS. Also, some report names have come over from RecTrac 10.3, so you should be able to search for reports if you used to run them in the old software.*

When you have located the correct report, click on it so it becomes highlighted blue. This will create a PDF preview of the report you intend to run on the right-hand side. Above the preview, you can switch the view between the summary output and the detail output if applicable. Below the preview, there will be a button to run the report.

Please Note: *The report preview is just a PDF picture to give you an idea of the report output that report will produce, it is not your actual data.*

After you have found the report you would like to run, select the "Run Report" option at the bottom of the screen. This will prompt you to apply any templates you may have for that report, you can just hit Continue to bypass the Run Options pop up.



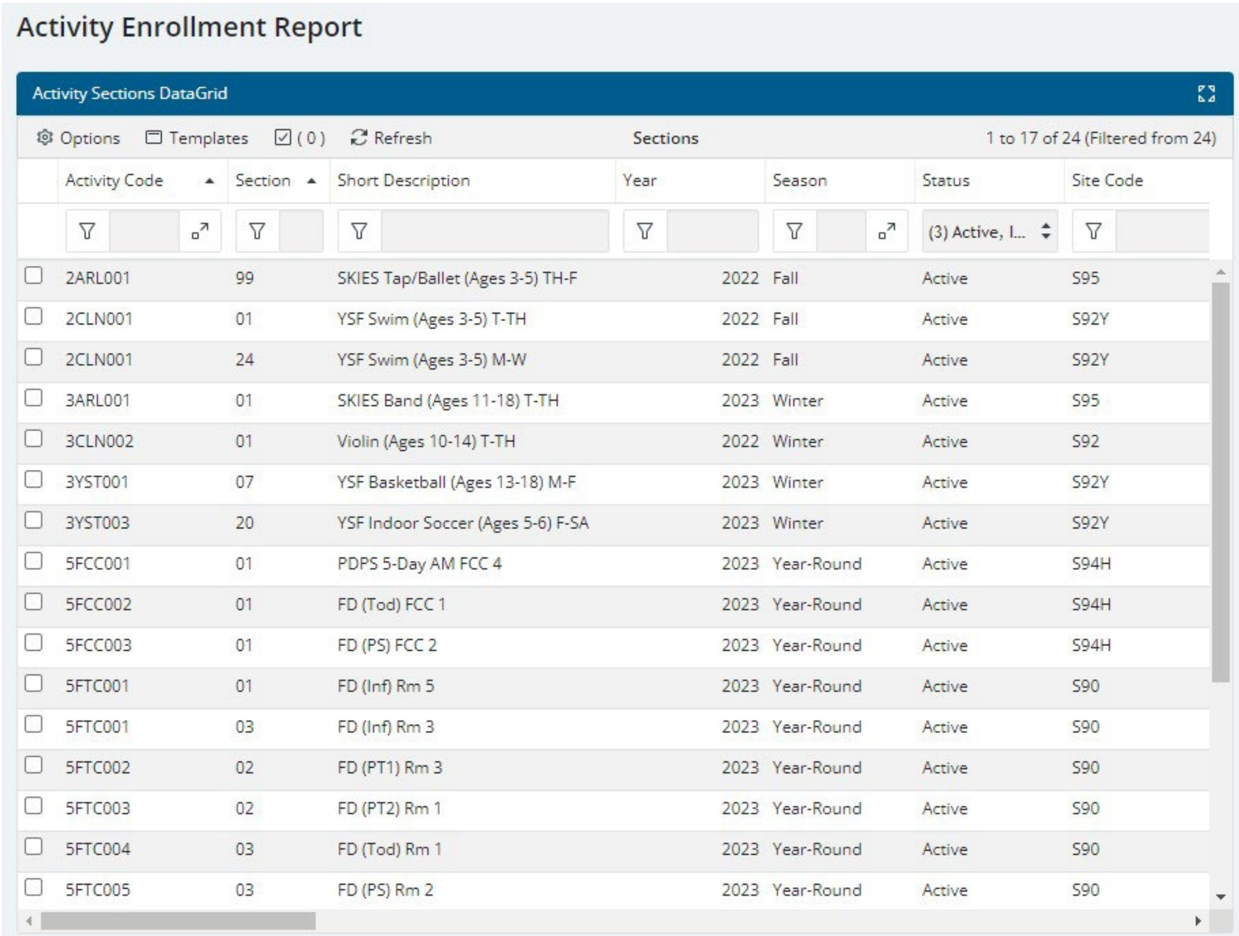
Name	Age	Gender	Primary Phone	Primary Email	Enrollment Status
Lockwood, Ted	5.17	Male	8022356472	chucklock@rectrac.com	Withdrawing
Mitscher, Matilda	4.08	Female	8022331876	petem@rectrac.com	Enrolled
Nimitz, Kate	3.17	Female	8022241885	cicnpac@rectrac.com	Enrolled
Spruance, Maggie	3.83	Female	8027031886	raymonds@rectrac.com	Enrolled

Reporting Characteristics

While every report output has slightly different options, they all function in a similar way. For this example, I am using the CYMS Activity Roster Report:

DataGrid

On the left-hand side of most reports, you will see a DataGrid, this will allow you to select one or multiple things to be reported on. To select an item to be reported on you just need to click on it so it highlights blue. You can also use this DataGrid like any other in RecTrac. You can sort, filter, and search by any of the fields across the top. You can also use the Options button in the top left of the DataGrid to select all rows and clear all selections. The DataGrid will vary from report to report to show what it is you are reporting on.


Activity Enrollment Report

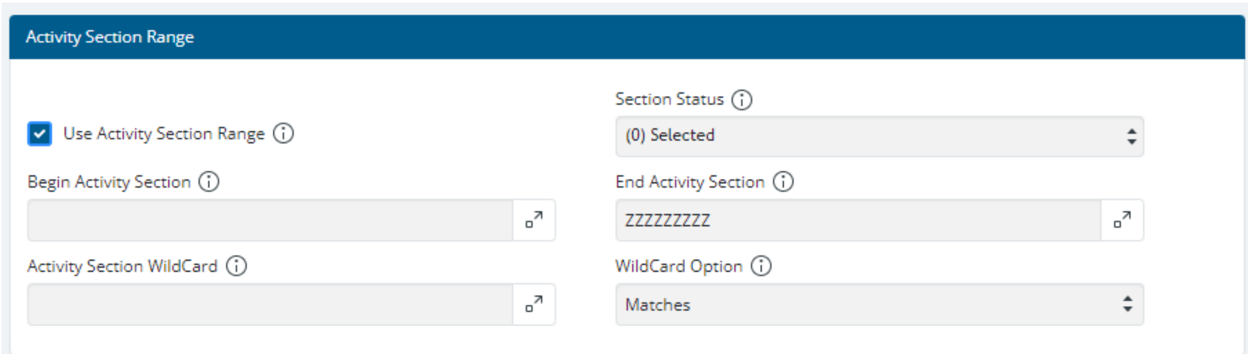
Activity Sections DataGrid

Options | Templates | (0) | Refresh | Sections | 1 to 17 of 24 (Filtered from 24)

Activity Code	Section	Short Description	Year	Season	Status	Site Code
					(3) Active, I...	
2ARL001	99	SKIES Tap/Ballet (Ages 3-5) TH-F	2022	Fall	Active	S95
2CLN001	01	YSF Swim (Ages 3-5) T-TH	2022	Fall	Active	S92Y
2CLN001	24	YSF Swim (Ages 3-5) M-W	2022	Fall	Active	S92Y
3ARL001	01	SKIES Band (Ages 11-18) T-TH	2023	Winter	Active	S95
3CLN002	01	Violin (Ages 10-14) T-TH	2022	Winter	Active	S92
3YST001	07	YSF Basketball (Ages 13-18) M-F	2023	Winter	Active	S92Y
3YST003	20	YSF Indoor Soccer (Ages 5-6) F-SA	2023	Winter	Active	S92Y
5FCC001	01	PDPS 5-Day AM FCC 4	2023	Year-Round	Active	S94H
5FCC002	01	FD (Tod) FCC 1	2023	Year-Round	Active	S94H
5FCC003	01	FD (PS) FCC 2	2023	Year-Round	Active	S94H
5FTC001	01	FD (Inf) Rm 5	2023	Year-Round	Active	S90
5FTC001	03	FD (Inf) Rm 3	2023	Year-Round	Active	S90
5FTC002	02	FD (PT1) Rm 3	2023	Year-Round	Active	S90
5FTC003	02	FD (PT2) Rm 1	2023	Year-Round	Active	S90
5FTC004	03	FD (Tod) Rm 1	2023	Year-Round	Active	S90
5FTC005	03	FD (PS) Rm 2	2023	Year-Round	Active	S90

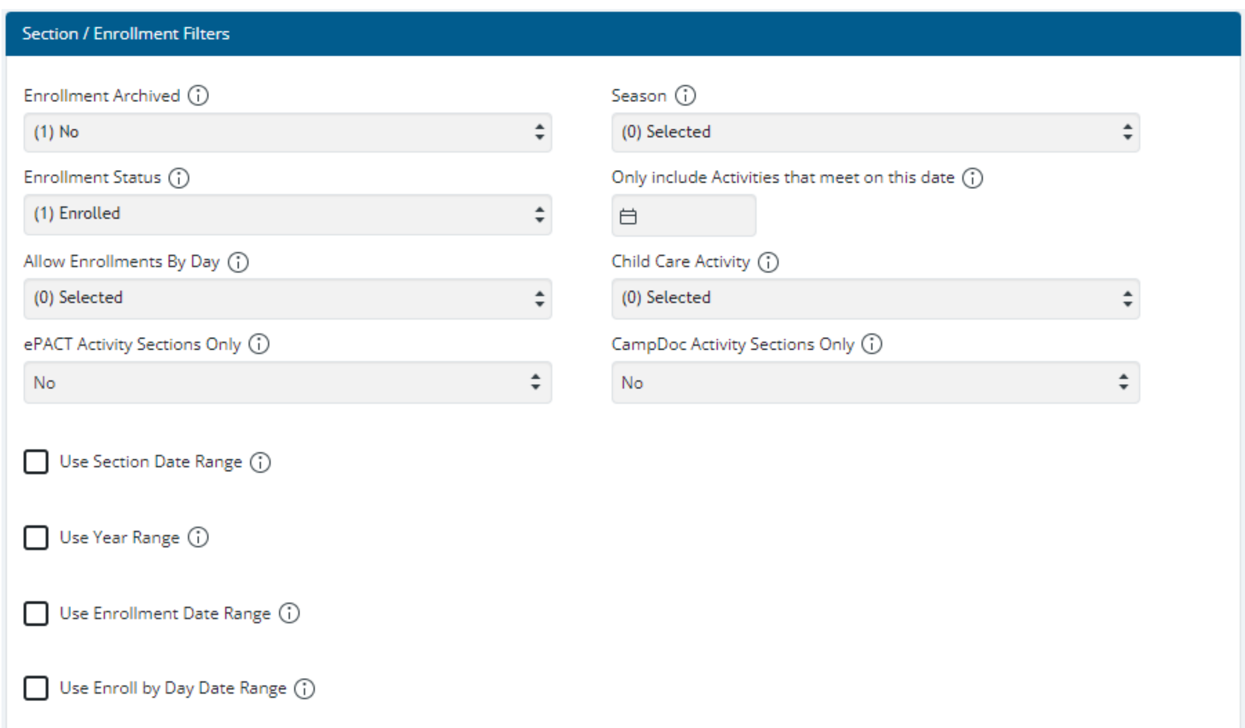
Reporting on Ranges

On the right-hand side of most reports, you will see a Range option, this will allow you to select one or multiple items to be reported on, based on their sequential item codes. To utilize the range, you need to check on the checkbox that says use item Range. Note that if you turn on the item range, the system will no longer report on anything that you have selected in the DataGrid. You either use the range OR use the DataGrid. Using the range is helpful when you would like to include every record, without selecting each record individually.



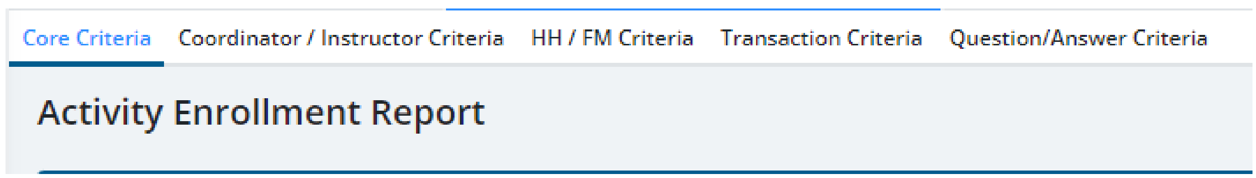
Primary Report Filters

On the right-hand side of most reports, below the range option, you will see a set of filters. These filters will allow you to further filter down anything that you have selected on the left-hand side in the DataGrid, or anything selected in your range. These filters typically make your reports show LESS information. Filters will vary wildly from report to report. For example, it is common not to choose any additional filters for an Activity Roster Report, whereas on a Financial Report, you are always filtering by at least the date. If too many filters are selected, it is possible that none of the data that you are reporting on will be able to meet all the filter requirements and the report will show blank.



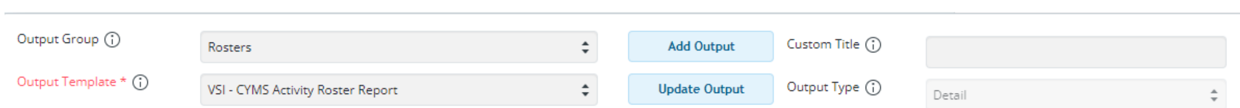
Additional Report Filters

Across the top of most reports, above the DataGrid, you will see a set of additional filters. These filters will allow you to further filter down anything that you have selected on the left-hand side in the DataGrid, or anything selected in your range. These filters typically make your reports show LESS information. Filters will vary wildly from report to report. For example, Roster reports will have additional filters based around Instructors, Question Answers, HH Information and Transaction Information, whereas financial reports will have additional filters for GLAC codes and Payment Codes. To navigate through the additional filters, you can either click the tabs across the top directly, or you the Previous and Next buttons at the bottom of the screen.



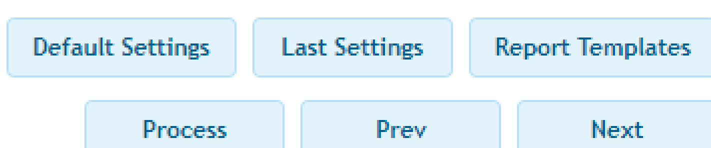
Reporting Output Options

Across the bottom of most reports, you will see different reporting options. On the left-hand side, you will see Output Group and Output Template. The output group will allow you to change the type of report within the same module. For example, you can change from an Activity – Roster report group to an Activity – Financial. You should remember these groups from the report output listing screen that we discussed earlier. The Output Template will allow you to change to a different report within the same group, without going back to the Report Output listing screen. Most reports will have a title bar across the top that matches the name of the report, if you would like that title bar to be customized, you can enter a Custom Title in the applicable field. Lastly, if a report has both a summary and detail output, you can change the way it displays by selecting the correct Output Type.



Reporting Buttons

Across the bottom of most reports, you will see different reporting options. On the right-hand side, you will see a collection of buttons, see below for listing on the function for each button.



Default Settings – Default settings will reset the report by clearing any of your DataGrid/range selections as well as any filters that you have selected.

Last Settings – Last settings will restore the settings from the last time that you ran this report.

Report Templates – Report templates will allow you to apply any previously saved report settings to this report.

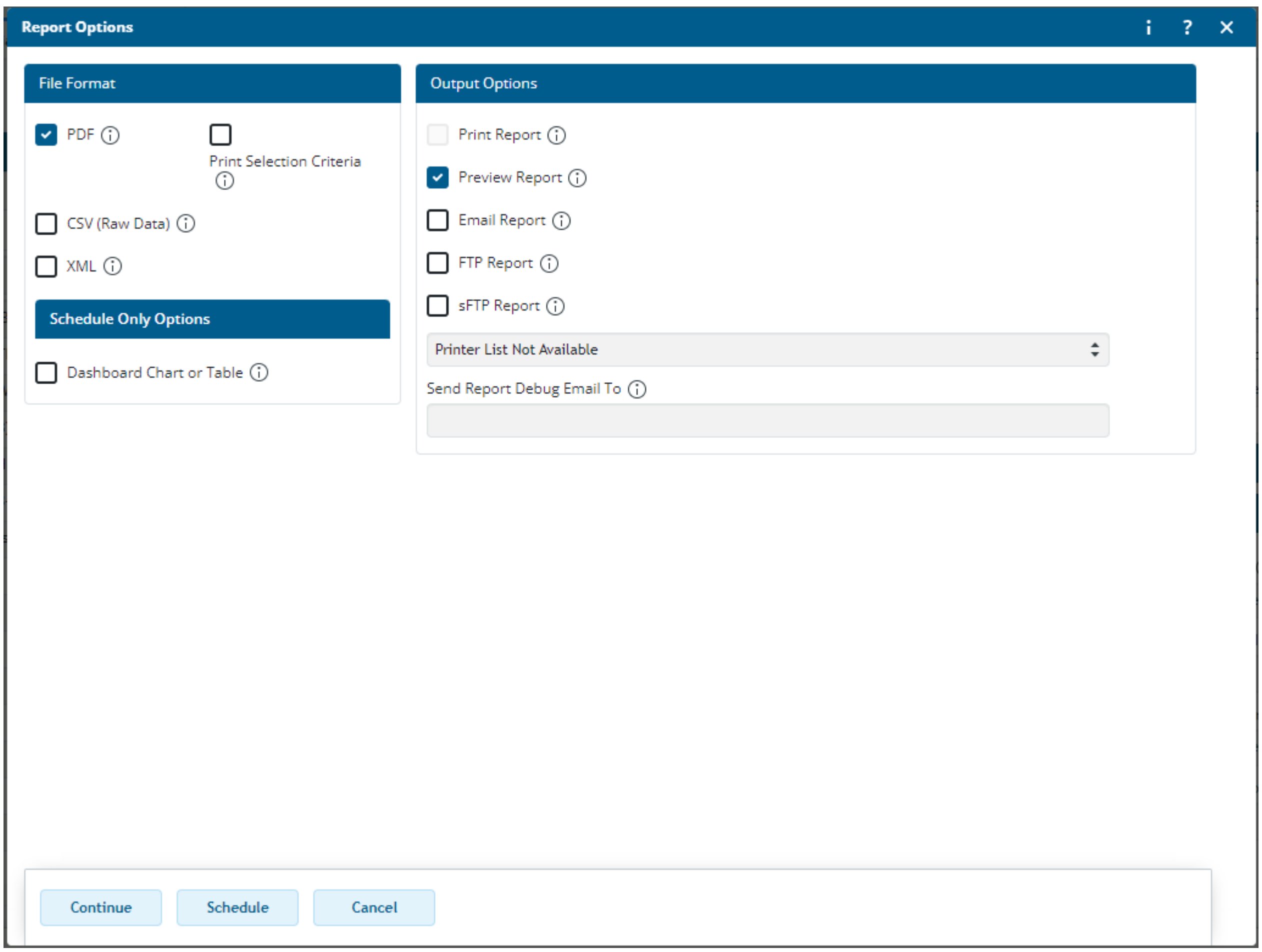
Process – Process is the button you click on when you are ready to run your report.

Previous and Next – These buttons will switch over to the additional filters tabs that were talked about earlier.

Running a Report

Processing a Dynamic Report

After you have found the correct report and you have selected all the correct filters, it is time to run that report. To do this, you will click on the Process button at the bottom of the screen. This will bring up a report options screen. For Dynamic Reports, all of the report options screens are more or less the same.



File Format

In the top left-hand corner of the Report Options, you will see file format. This will allow you to choose one or more output file formats for your report. The PDF will create a PDF document, the CSV will create a file that can be manipulated in a spreadsheet and XML will have the report output in Extensible Markup Language format (.xml). Lastly you have the option to Print Selection Criteria, this will create another sheet to go along with the report that will show information about the report such as the filters you selected.

Output Options

In the top right-hand corner of the Report Options, you will see file format. This will allow you to choose one or more ways to send or view this report. The Preview option will create a PDF preview of the report and pop up on your screen when the report has finished processing. The Print report option will send the report directly to your printer without previewing it first (typically this is not recommended. Email Report will allow you to enter in an email address to send the report to. FTP and sFTP will allow you to send your report to a FTP site, usually to be picked up by another software application.

Running the Report

Once the correct file format and report destination are selected, click Continue to run the report.

Processing a Fixed Report

In RecTrac, there are two report types, Dynamic and Fixed. Typically, a fixed report is going to have an additional set of options when you select process.

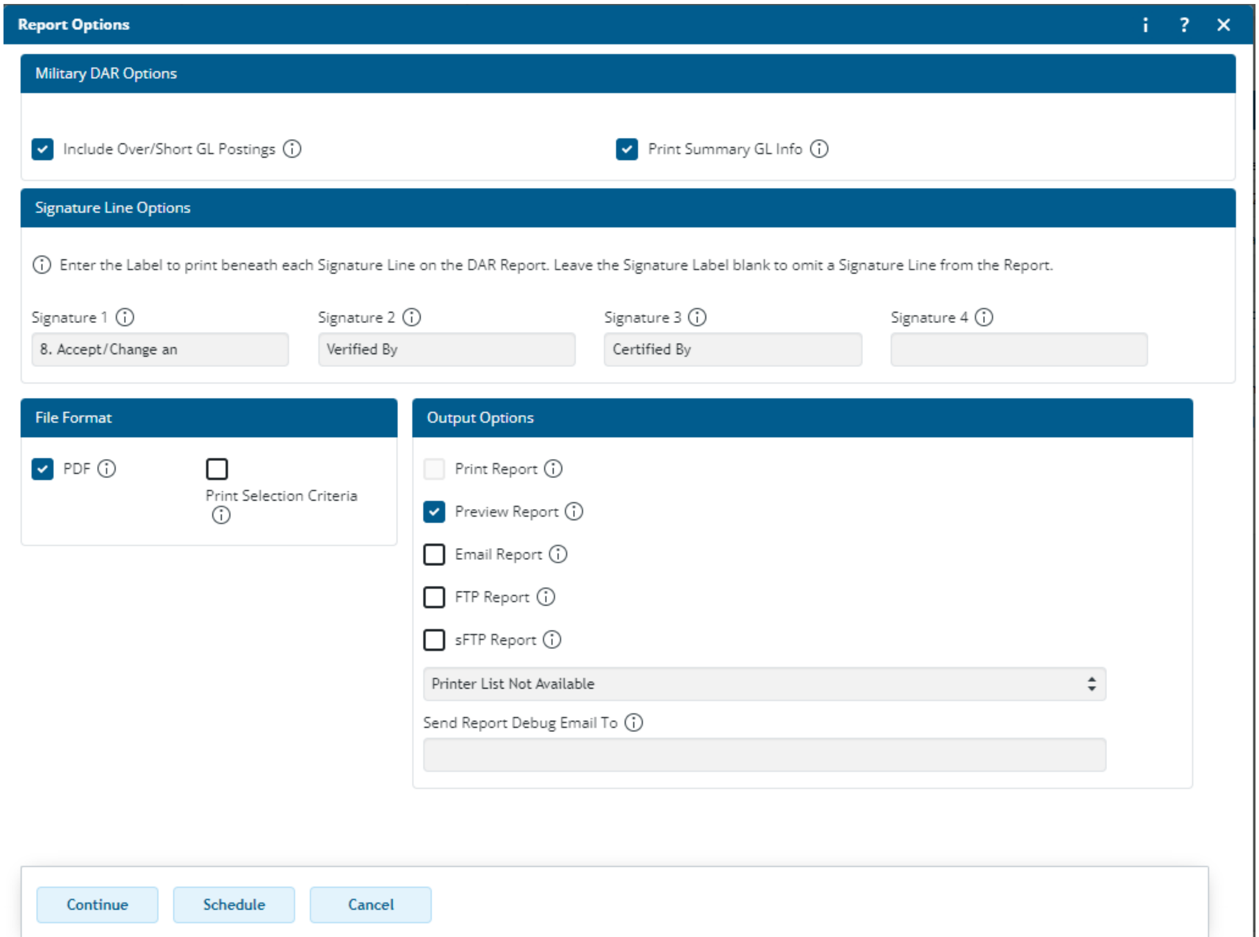
How to Tell if a Report is Fixed or Dynamic

When you were in report output listing earlier, you may have noticed that some reports had a white background and that some reports had a pink background. The reports with a white background are dynamic reports, and the reports with a pink background are fixed reports.

Module/Group: System - Financial					
VSI - Accrual History Report	System - Financial	SADetail	VSI Standard	Yes	Landscape
VSI - Cash Journal	System - Financial	SAGLDistribut...	VSI Standard	Yes	Portrait
VSI - Control Account History Report	System - Financial	SAControlAcc...	VSI Standard	Yes	Portrait
VSI - Cost Center GL Report by Cost Center	System - Financial	SAGLDistribut...	VSI Standard	Yes	Landscape
VSI - Cost Center GL Report by GL Code	System - Financial	SAGLDistribut...	VSI Standard	Yes	Landscape
VSI - Coupon Redemption Report	System - Financial	SASerialCoupon	VSI Standard	Yes	Landscape
VSI - Credit Book Activity Report	System - Financial	SAPerson	VSI Standard	Yes	Portrait
VSI - Credit Card Report	System - Financial	SACreditCard...	VSI Standard	Yes	Landscape
VSI - E-Check Report	System - Financial	SACreditCard...	VSI Standard	Yes	Landscape
VSI - Employee Tip Report	System - Financial	SAGLDistribut...	VSI Standard	Yes	Portrait
VSI - End of Shift Close Out Journal	System - Financial	SAEndOfShift	VSI Standard	Yes	Portrait
VSI - Fee Revenue Report by Fee Category	System - Financial	SAFEE	VSI Standard	Yes	Portrait
VSI - Fee Revenue Report by Fee Description	System - Financial	SAFEE	VSI Standard	Yes	Portrait
VSI - Gift Certificate Activity Report	System - Financial	SAGiftCertifica...	VSI Standard	Yes	Portrait
VSI - Gift Certificate Listing	System - Financial	SAGiftCertifica...	VSI Standard	Yes	Portrait
VSI - GL Distribution	System - Financial	SAGLDistribut...	VSI Standard	Yes	Portrait
VSI - GL Distribution (Dynamic with Pay codes and ...	System - Financial	SAGLDistribut...	VSI Standard	Yes	Portrait
VSI - GL Distribution (Dynamic)	System - Financial	SAGLDistribut...	VSI Standard	Yes	Portrait

Report Options

To process a fixed report, you will still need to select the proper items to be reported on and filters, then click Process. However, when a fixed report is selected, there are usually an additional set of options related directly to that report output. See the example below of the Military DAR report output options screen.



This report includes both the standard file format and output options, but also includes setting specific to the Military DAR report.

Running the Report

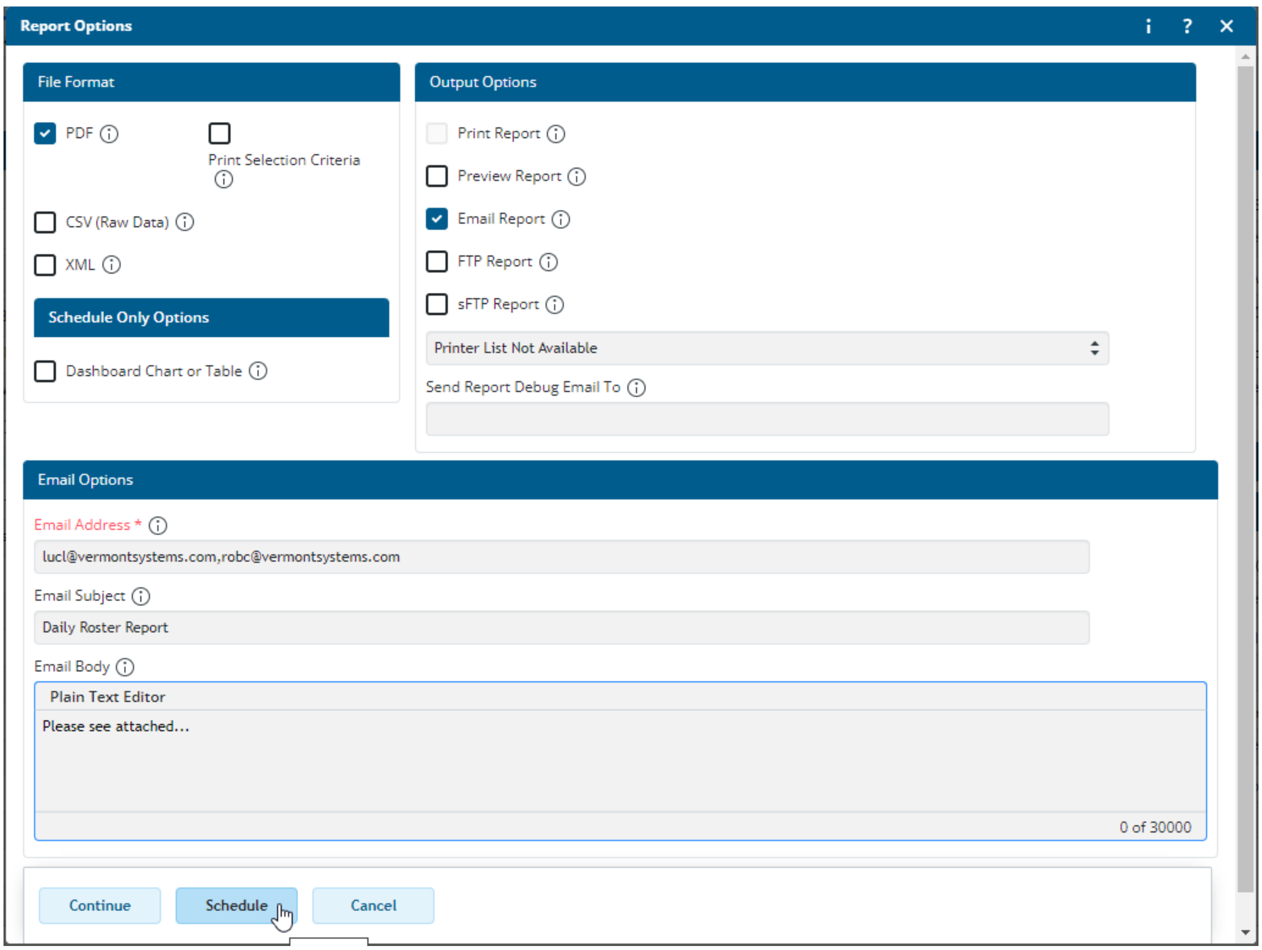
Once the correct report specific settings, file format and report destination are selected, click Continue to run the report.

Scheduling a Report

Up to this point, we have been using the continue button to run our reports one time. If you would like to schedule a report to be sent daily, monthly, yearly or every 15 minutes, you can do that by scheduling the report.

Report Options

When scheduling a report, the most common output option is "Email Report", if the report is set to the Preview Report default and you schedule it, it will still run but it will just preview whether you are sitting in front of your computer or not. When you select the email option it is going to ask you for an email address, email subject and email body. If you would like to have the report sent to more than one person, you can put in multiple emails separated by a comma.



Scheduling the Report

After you have the correct settings and output options selected, you will select the schedule button at the bottom of the screen. This will open the Schedule Generator. In the Schedule Generator, you will want to make sure that you make the schedule name something specific. This way, you can easily find this schedule if you need to make changes to this report later. For the schedule dates and month, put in when you would like this report to start sending out and when you would like it to stop. For the day option specific weekdays will allow you to select the days of the week you receive this report, the specific days of the month option will allow you to pick one or multiple days of the month to receive the report and the number of days option will allow you to select the frequency in days that you receive this report. For the time option, select the time that you would like the report to be sent, you are able to select multiple times here if desired. Lastly, for run as you can either leave this as your username or choose the system account “ZZZ”. Click Save to schedule the report.