

## ILLINOIS MATHEMATICS AND SCIENCE ACADEMY ®

### INSTRUCTIONS FOR ADDING REPORTS TO MIP PROCESS MANAGER FAVORITES FOLDER

#### ABILA MIP PROCESS MANAGER WINDOW

The Process Manager window contains the **Favorites Tab**, **Reports Tab** and **Forms Tab**. Each tab groups items by process or menu and makes them selectable in collapsible format within folders. You can also store frequently used reports in the **FAVORITES TAB** for easy retrieval.

#### FAVORITES TAB

The **favorites tab** groups reports into customizable folders and subfolders for quick access. To add an item in the **FAVORITES FOLDER**, select the item from the **REPORTS TAB**, right-click, and then select **ADD TO FAVORITES**. To keep favorites organized, create custom folders, and then drag and drop items into them.

Create a new folder: If you right-click on a folder, a new folder is created beneath it. You should rename the folder to something meaningful to you.

Remove from favorites: Right-click on an item, and select 'remove from favorites'. This does not delete the report; it only removes the shortcut.

Rename: Right-click on an item and select 'rename' to enter a new name.

Edit: Right-click on an item and select 'edit' to change content and filters.

Run: Right-click on an item and select 'run' to run the report; double clicking on the report also runs the report.

QUESTIONS: Please call x5031 or stop by the business office. Anyone on staff can help answer your questions.

## FINDING REPORTS TO ADD TO FAVORITES FOLDER

The screenshot displays the MIP ADVANCE software interface. On the left is a vertical navigation menu with categories: Accounting, Administration, Payroll, and Requisitions. The 'Encumbrances' option under Accounting is highlighted. The main window shows a flowchart for the Encumbrances process, including steps like 'Enter Encumbrances', 'Modify Encumbrances', 'Post Transaction', 'Enter A/P Invoices', 'Write Disbursement Checks', 'Enter Cash Disbursements', and 'Enter Encumbrance Liquidations'. Below the flowchart are sections for 'Maintenance' (Vendors) and 'Related Tasks' (Encumbrance Balances, Auto-Close Encumbrances, Budget Balances, Forms Designer). On the right, a 'Process Manager' pane shows a tree structure under 'Encumbrance Analysis' with three sub-items: 'Reports - Encumbrances - Detail Encumbrance Ledger', 'Reports - Encumbrances - Encumbrance Budget Report', and 'Reports - Encumbrances - Summary Encumbrance Ledger'. At the bottom right, a tabbed interface shows 'Favorites', 'Reports', and 'Forms' tabs, with 'Reports' currently selected. A text box with arrows points to the 'Encumbrances' menu item, the 'Reports' tab, and the report list in the Process Manager.

To add the following reports to your Favorites Folder, click on **ENCUMBRANCES**, then click on the **REPORTS TAB**. The + sign opens the grouping to reveal available reports.

- \* PO Detail Report [Reports-Encumbrances-Detail Encumbrance Ledger]
- \* Budget Report [Reports-Encumbrances-Encumbrance Budget Report]
- \* PO Summary Report[Reports-Encumbrances-Summary Encumbrance Ledger]

## FINDING PO DETAIL REPORTS TO ADD TO FAVORITES FOLDER

**PO DETAIL REPORTS:**

Open the **Encumbrances-Detail Encumbrance Ledger** grouping by clicking on the + and find the appropriate PO detail report.

Select the report by clicking on it once.

Right-click on the report and select 'Add to Favorites'.

The screenshot shows the 'Encumbrances' section of the software. The main area contains a flowchart with steps: Enter Encumbrances, Modify Encumbrances, Post Transaction, Enter A/P Invoices, Write Disbursement Checks, Enter Cash Disbursements, and Enter Encumbrance Liquidations. Below the flowchart is a 'Related Tasks' section with links to Vendors, Encumbrance Balances, Auto-Close Encumbrances, Budget Balances, and Forms Designer. The right sidebar displays a list of reports under the 'Reports - Encumbrances - Detail Encumbrance Ledger' group. A context menu is open for the report 'FY19 PO Detail - Office of Public Safety', showing options: Edit, Run, and Add to Favorites. The bottom status bar shows the date and time: 1:04 PM, 11/18/2019.

## FINDING BUDGET REPORTS TO ADD TO FAVORITES FOLDER

**BUDGET REPORTS:**  
Open the **Encumbrances - Encumbrance Budget Report** grouping by clicking on the + and find the appropriate budget report.

Select the report by clicking on it once.

Right-click on the report and select 'Add to Favorites'.

## FINDING PO SUMMARY REPORTS TO ADD TO FAVORITES FOLDER

**PO SUMMARY REPORTS:**  
Open the **Encumbrances-Summary Encumbrance Ledger** grouping by clicking on the + and find the appropriate PO Summary report.

Select the report by clicking on it once.

Right-click on the report and select 'Add to Favorites'.

## FINDING TRANSACTION REPORTS TO ADD TO FAVORITES FOLDER

To add a **Transaction Report** to your Favorites Folder, click on **BASIC TRANSACTIONS**, then click on the **REPORTS TAB**. The + sign opens the grouping to reveal available reports.

\* Transaction Listing – [Budget Unit name]  
Select the report by clicking on it once.  
Right-click on the report and select 'Add to Favorites'.

The screenshot shows the Accounting for Illinois Mathematics and Science Academy - Abila MIP - [Basic Transactions] application. The left sidebar has a 'Basic Transactions' section highlighted. The main area displays a tree view of transaction types. A text box with arrows points to the 'Basic Transactions' section and the 'Reports' tab in the bottom right. The 'Reports' tab is open, showing a list of transaction reports. A right-click context menu is open over the 'Transaction Listing - Office of Public Affairs' report, with the 'Add to Favorites' option selected.