

How to Use the Cypress Report Distribution Service to Access Reports

First, if the Cypress client is not already installed on your computer, follow the installation instructions found at <https://cypress.doit.wisc.edu/>.

Once the Cypress client is installed on your computer, follow the steps below to view, print, e-mail and save your departmental reports.

Section 1 – Log In to Cypress and Open the Inbox Viewer (Page 1)

Section 2 – View Reports and Search Report Content (Page 4)

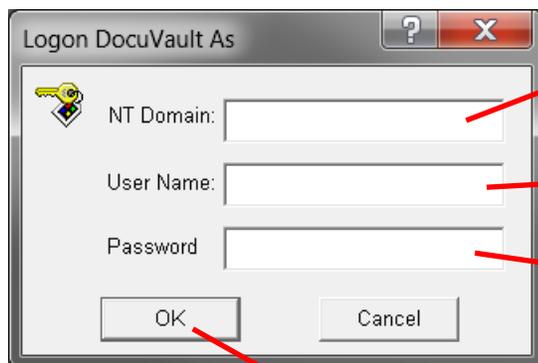
Section 3 – Print Reports (Page 8)

Section 4 – E-mail Reports (Page 12)

Section 5 – Save Reports (Page 15)

Section 6 – Exit the Inbox Viewer and Log Out of Cypress (Page 18)

Section 1 – Log In to Cypress and Open the Inbox Viewer

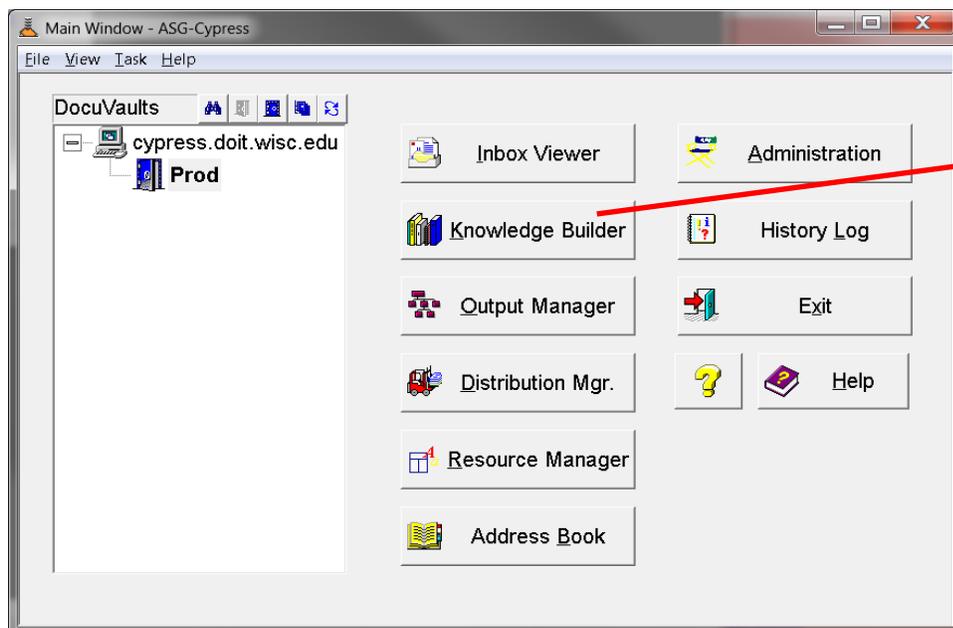


1. Enter "Cypress".

2. Enter your assigned user name (e.g., NetID or 3-character login).

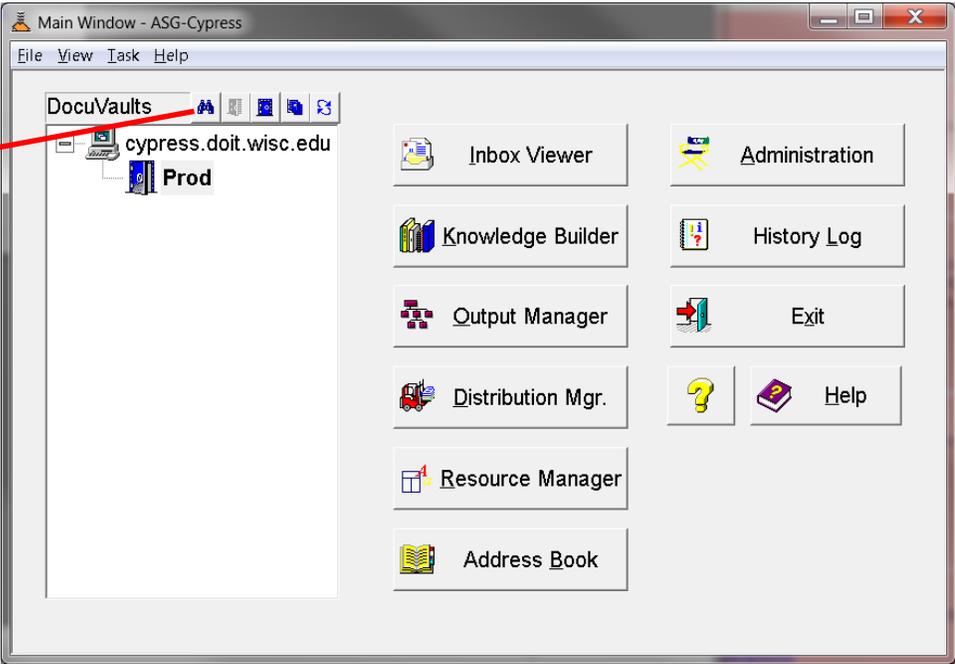
3. Enter your password.

4. Click OK (or press Enter key).

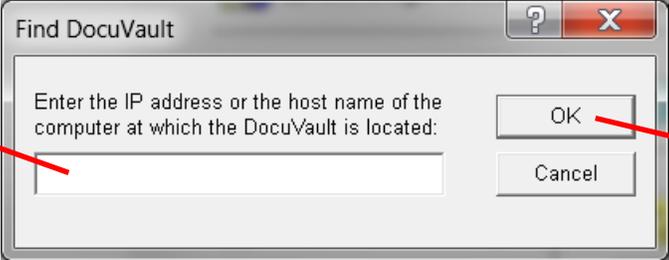


5a. If the "Knowledge Builder" box is grayed out, go to step 5b. Otherwise, skip to step 6.

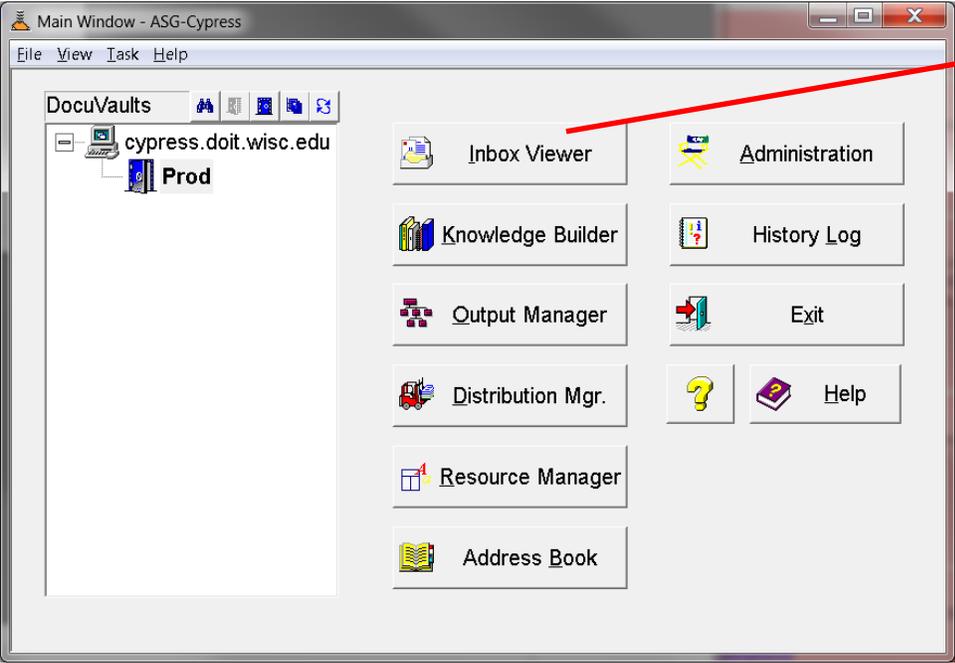
5b. Click the "Find DocuVault" button.



5c. Enter "cypress.doit.wisc.edu".

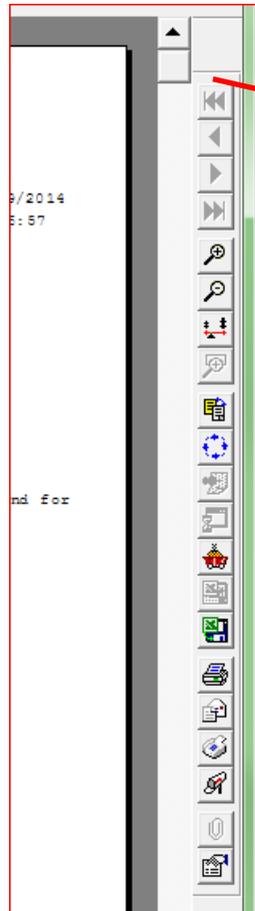


5d. Click OK (or press Enter key).



6. Click "Inbox Viewer".

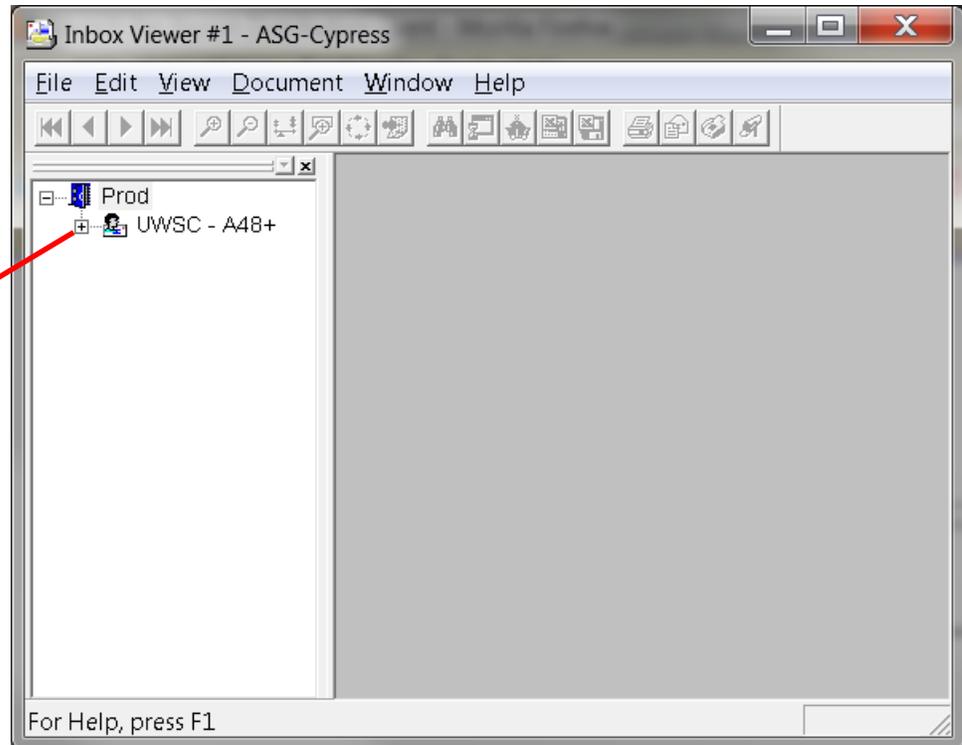
When you log in to Cypress for the first time, you will notice that the default location of the toolbar is on the right side of the screen. If you wish to move the toolbar from the side to the top of the screen like shown in the illustrations in this set of instructions, point your cursor in the space just above the top of the toolbar. Click and hold the mouse button, then drag the cursor to the empty space across the top of the screen. When the outline of the toolbar is positioned where you prefer, let go of the mouse button, and the toolbar will move to your selected position.



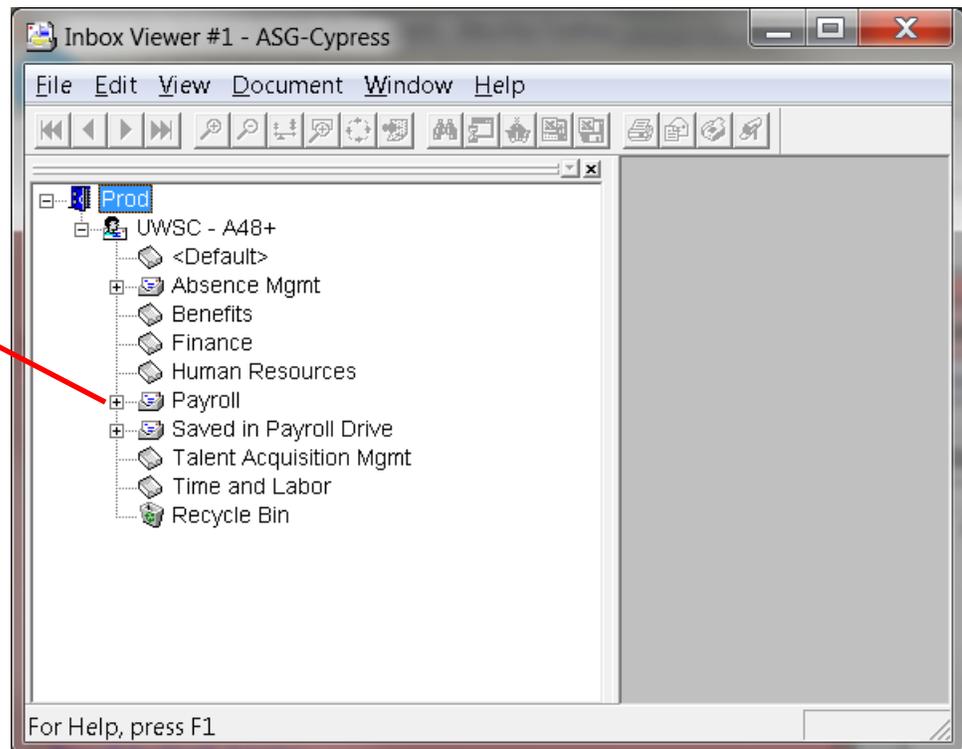
Point your cursor here. Then click and hold and drag the toolbar to a new location as desired.

Section 2 – View Reports and Search Report Content

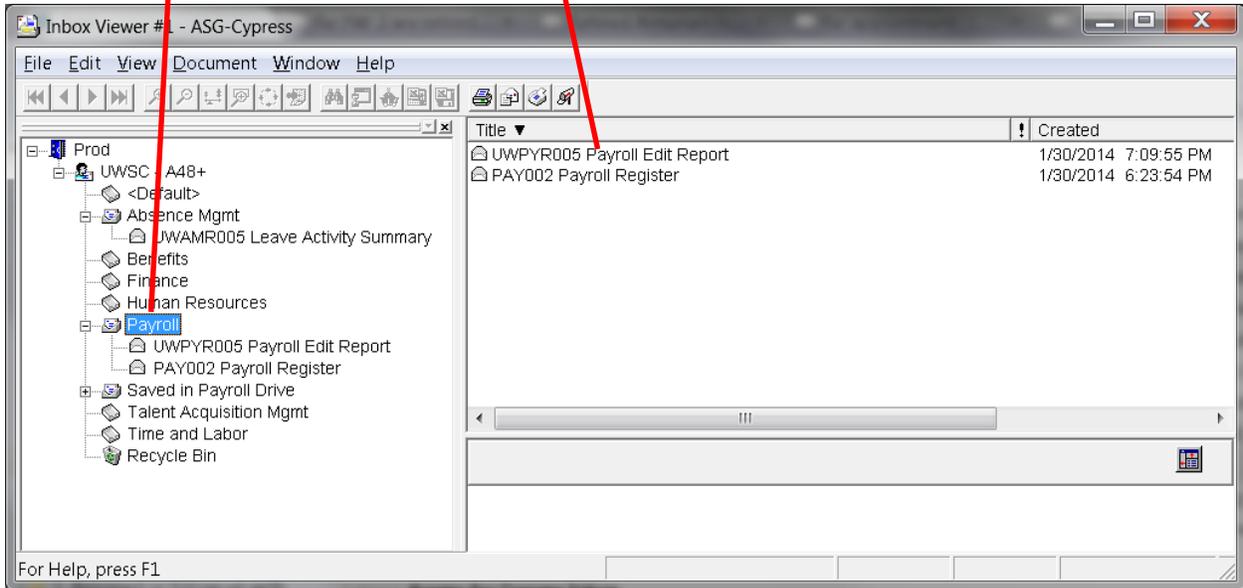
7. Click + to expand folders. (Note that the name of the top folder you see reflects the UDDS for which you are authorized. For example, a user in the Department of German will see “UWSC - A4835”).



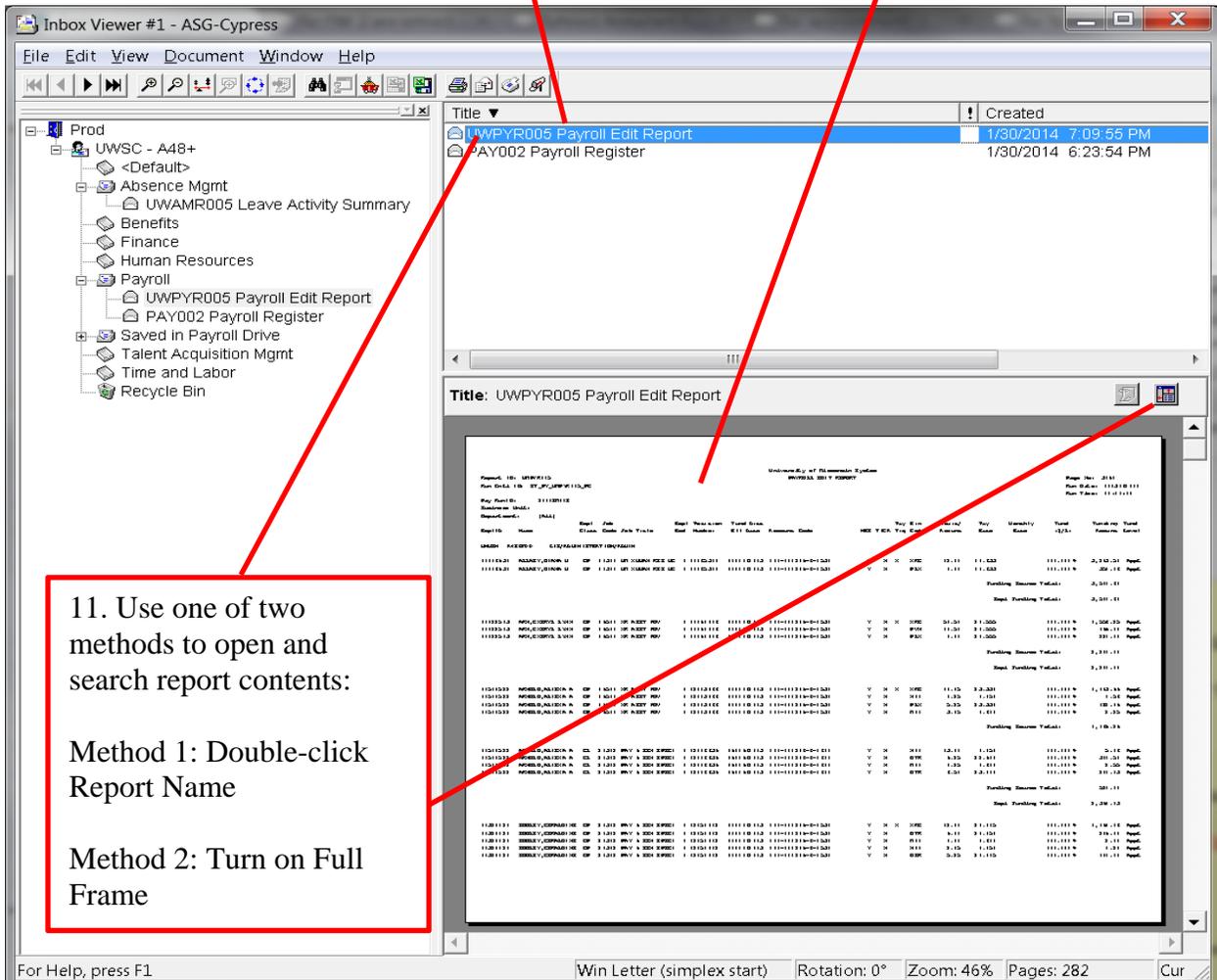
8. A + to the left of a folder indicates that one or more reports are contained in the folder. The absence of a + indicates the folder is empty. Click + to expand the folder and see the list of reports contained therein.



9. After expanding the folder whose reports you want to access, all available reports appear immediately below the folder name as well as in the upper right pane of the Inbox Viewer.



10. To preview a report, click once on the report name in the upper right pane of the Inbox Viewer. Notice that the report becomes visible in the lower right pane of the Inbox Viewer.



11. Use one of two methods to open and search report contents:

Method 1: Double-click Report Name

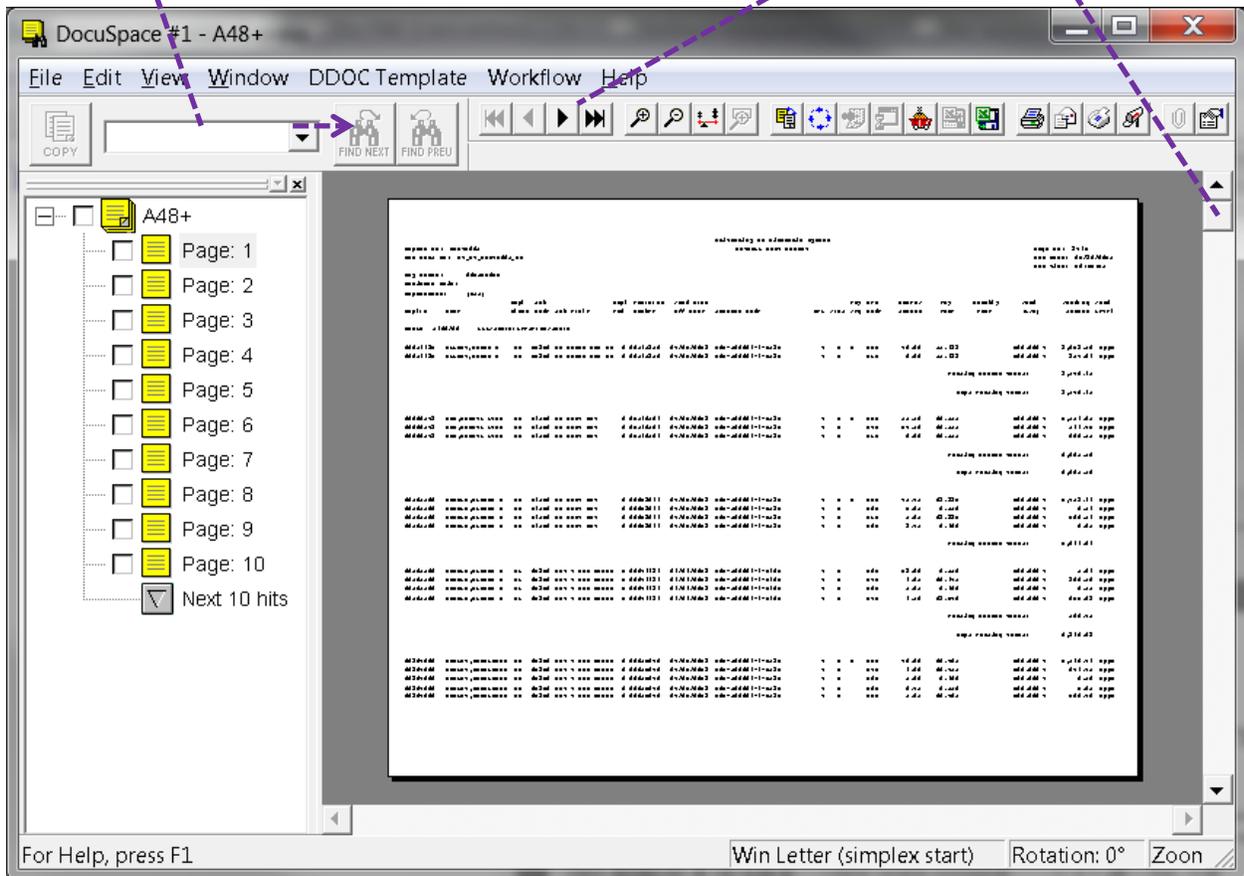
Method 2: Turn on Full Frame

Method 1 – To open a report using the **double-click method**, double-click the report name in the upper right pane of the Inbox Viewer. A new window called DocuSpace will open, and you may scroll through the pages of the report using the arrow buttons at the top of the window or by dragging the scroll bar on the right edge of the window. Alternatively, search for a specific employee by entering the person’s EmplID or name in the search box and clicking the “Find Next” button to the right of the search box.

To search report contents, enter text such as an EmplID or name...

...then click “Find Next”.

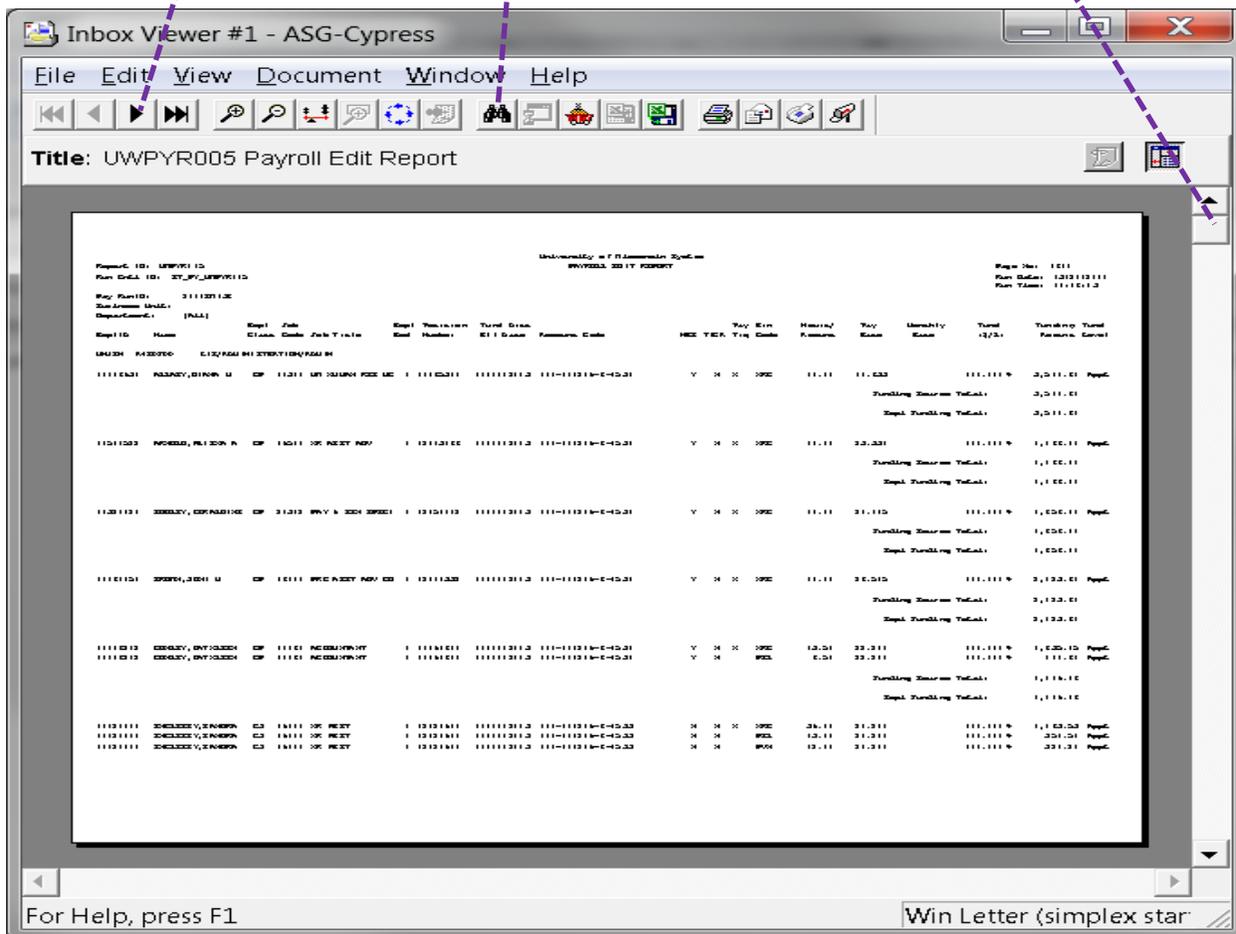
Scroll through the pages of the report using the arrow buttons or scroll bar.



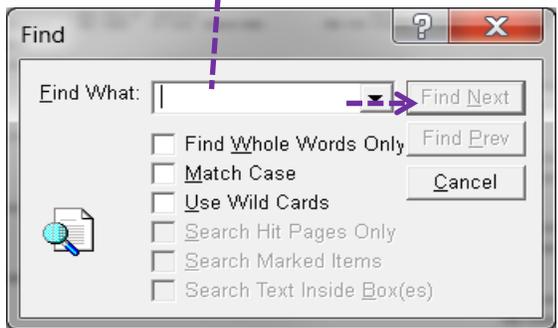
Method 2 – To open a report using the **full frame method**, click the full frame button  in the lower right pane of the Inbox Viewer. Notice that the left and upper right panes of the Inbox Viewer window disappear, and the lower right pane expands to fill the Inbox Viewer. You may scroll through the pages of the report using the arrow buttons at the top of the window or by dragging the scroll bar on the right edge of the window. Alternatively, search for a specific employee by clicking the “Find” button, then entering the person’s EmplID or name in the search box and clicking the “Find Next” button in the search box (or pressing the “Enter” key).

Scroll through the pages of the report using the arrow buttons or scroll bar.

To search report contents, click “Find” button, then...



...enter text such as EmplID or name...



...then click “Find Next” (or press Enter key).

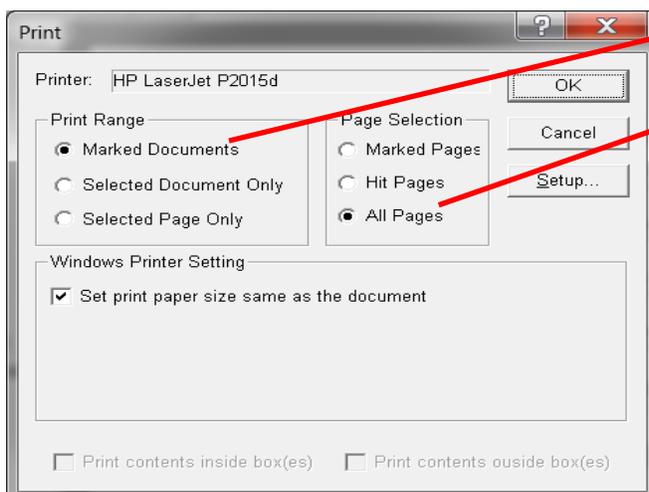
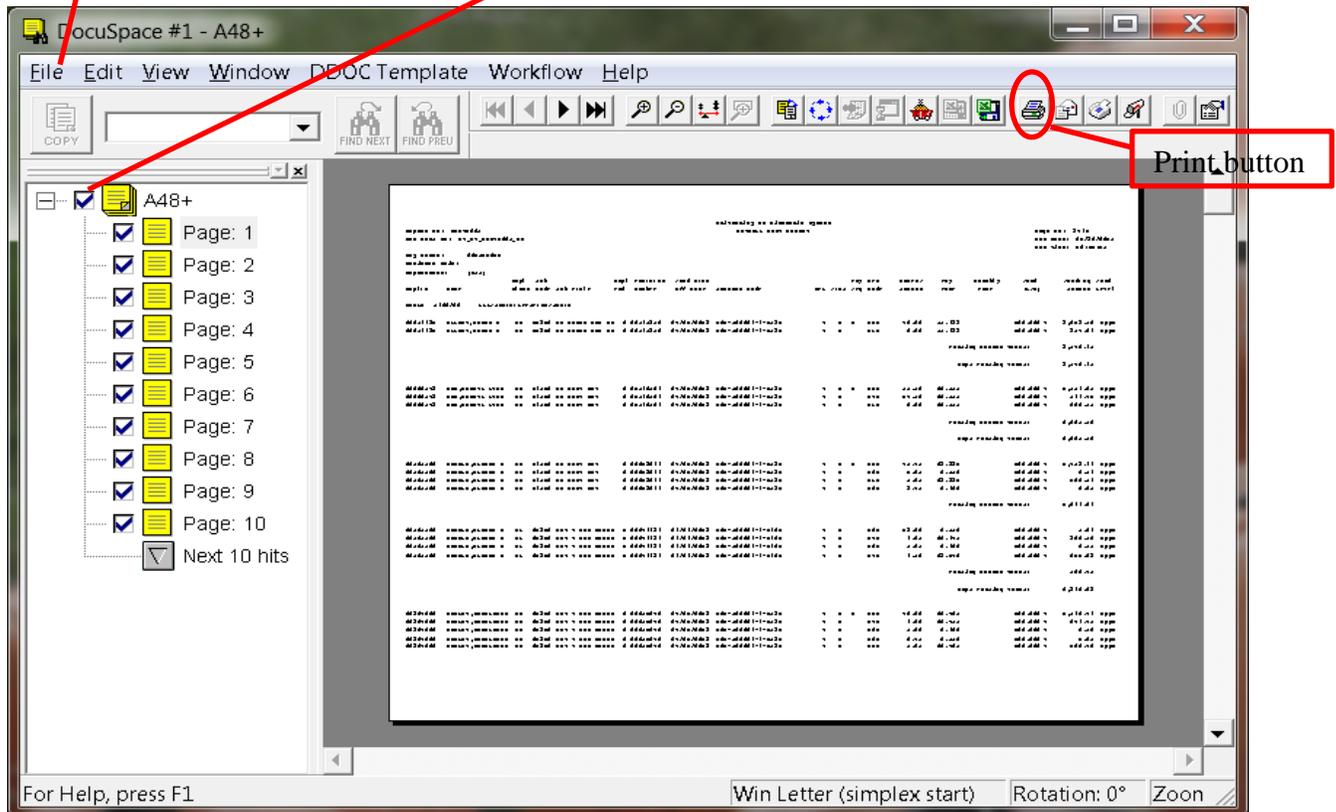
Section 3 – Print Reports

After a report is open, it can be printed in its entirety or by selected pages as needed. To print the entire report, you may find that this is most easily accomplished by opening the report using the *double-click method* (method 1) described in Section 2. By contrast, to print selected pages of the report, you may find that this is most easily accomplished by opening the report using the *full frame method* (method 2) described in Section 2. Note, however, that the entire report or selected pages of the report can be printed using either method for opening the report.

To print an entire report using the *double-click method* for opening the report:

12b. Go to the “File” menu and select “Print” or click the “Print” button.

12a. To print the entire report, check the box to the left of the top folder. This action will select all pages of the report.

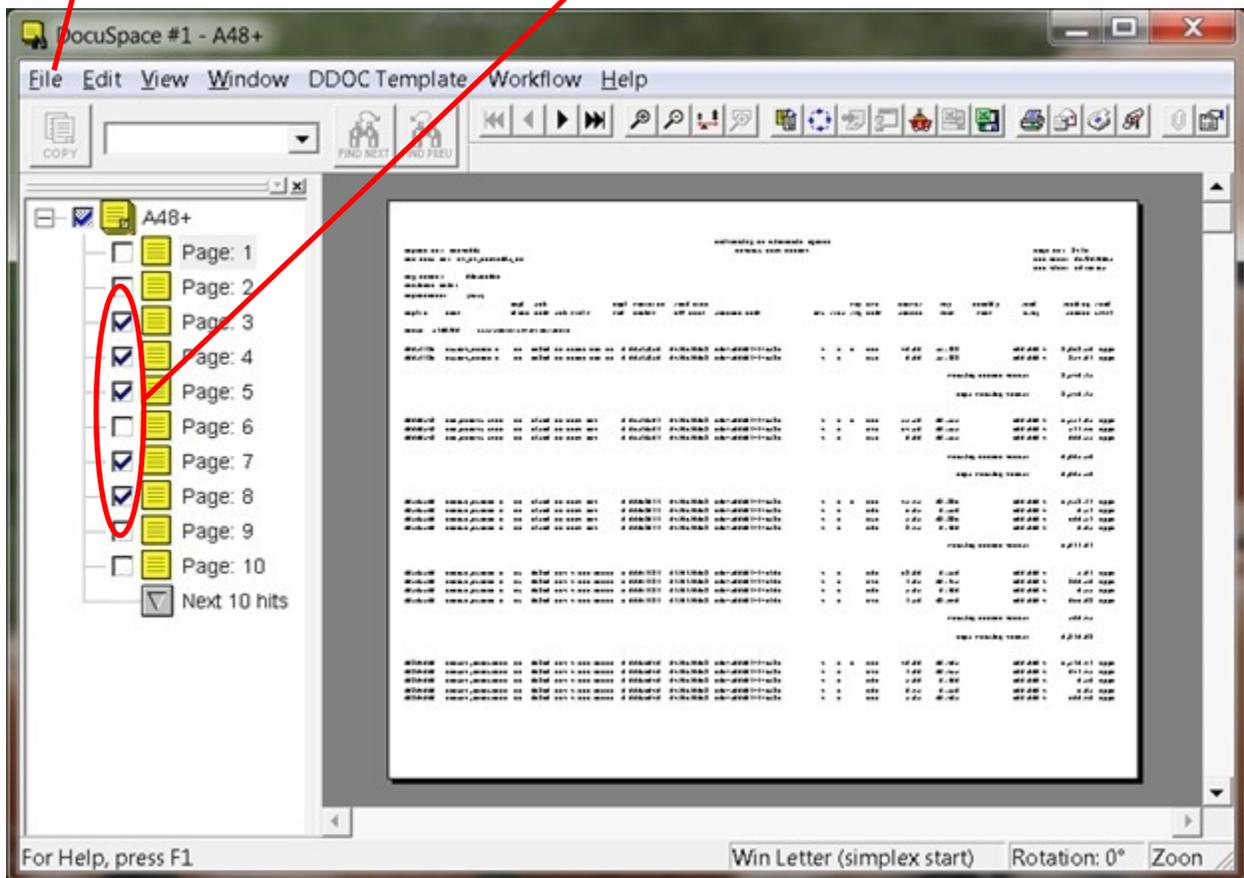


12c. Notice that the radio buttons “Marked Documents” and “All Pages” are chosen. Click OK (or press Enter key).

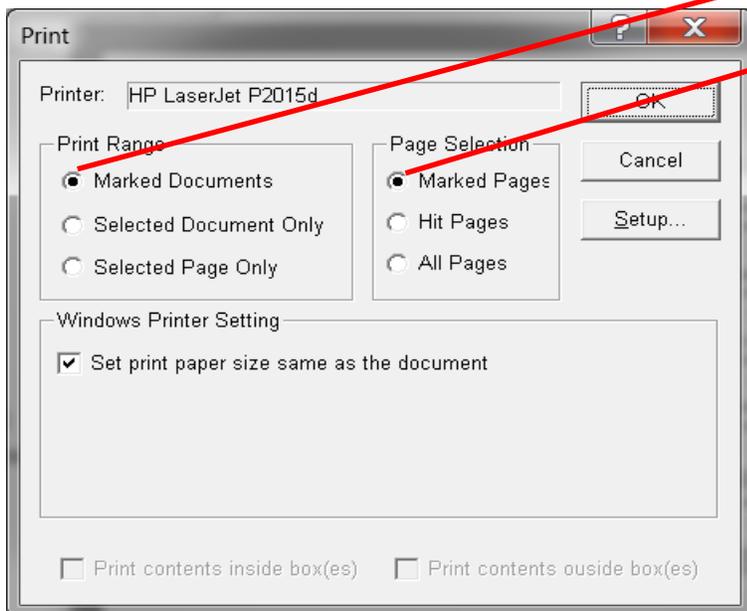
To print selected pages of the report using the *double-click method* for opening the report:

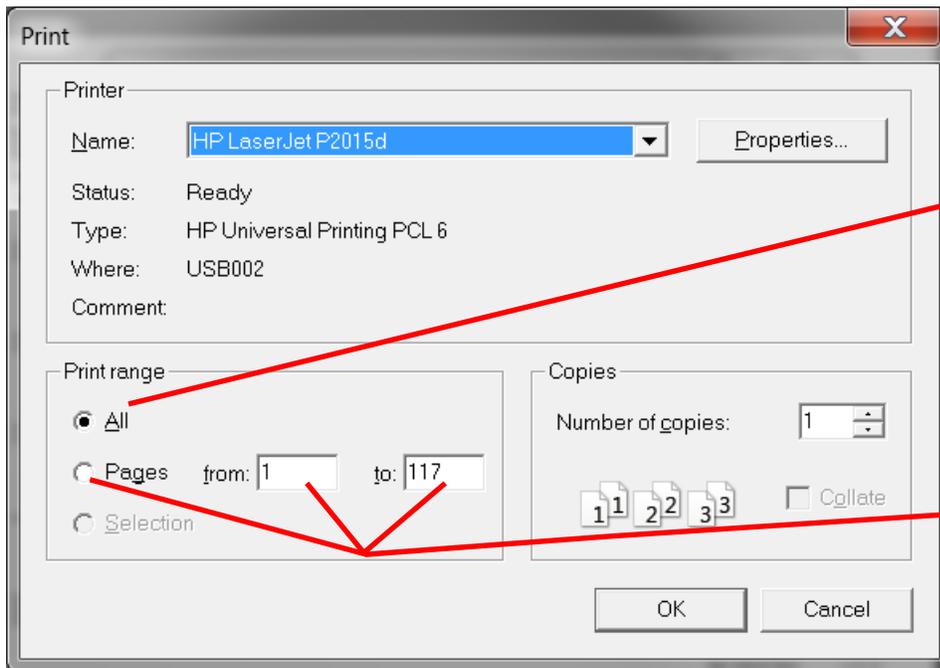
13b. Go to the “File” menu and select “Print” or click the “Print” button.

13a. To print selected pages of the report, check only the box(es) to the left of the page(s) to be printed.



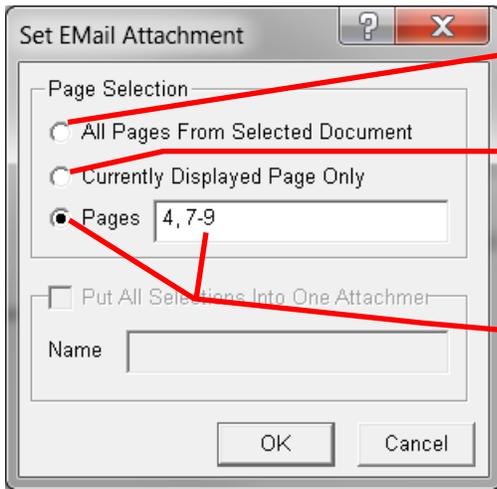
13c. Notice that the radio buttons “Marked Documents” and “Marked Pages” are chosen. Click OK (or press Enter key).





14c. To print the entire report, choose the radio button “All” and click OK (or press Enter key).

14d. To print selected pages of the report, choose the radio button “Pages”, enter the desired page range, and click OK (or press Enter key).



15b. To e-mail the entire report, choose the radio button “All Pages from Selected Document” and click OK (or press Enter key).

15c. To e-mail just the page that is presently displayed, choose the radio button “Currently Displayed Page Only” and click OK (or press Enter key).

15d. To e-mail selected pages of the report, choose the radio button “Pages”, enter the desired page numbers or page range, and click OK (or press Enter key).

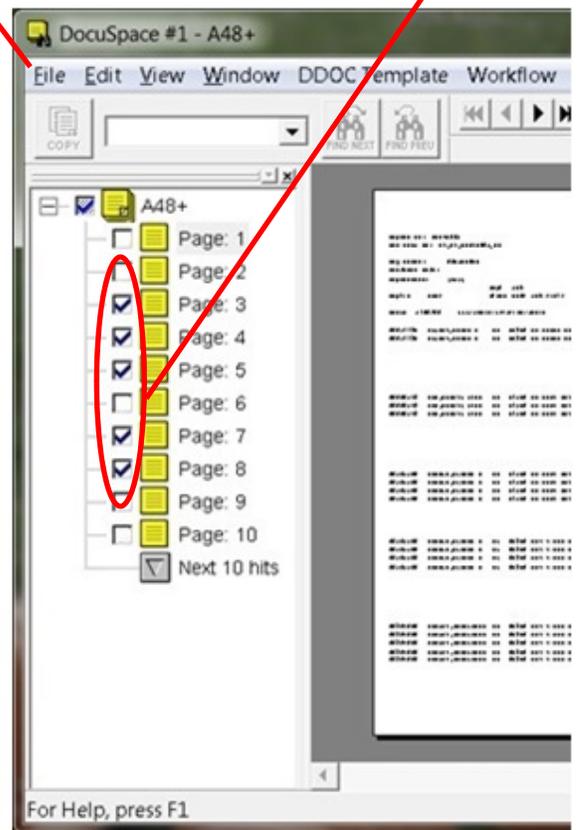
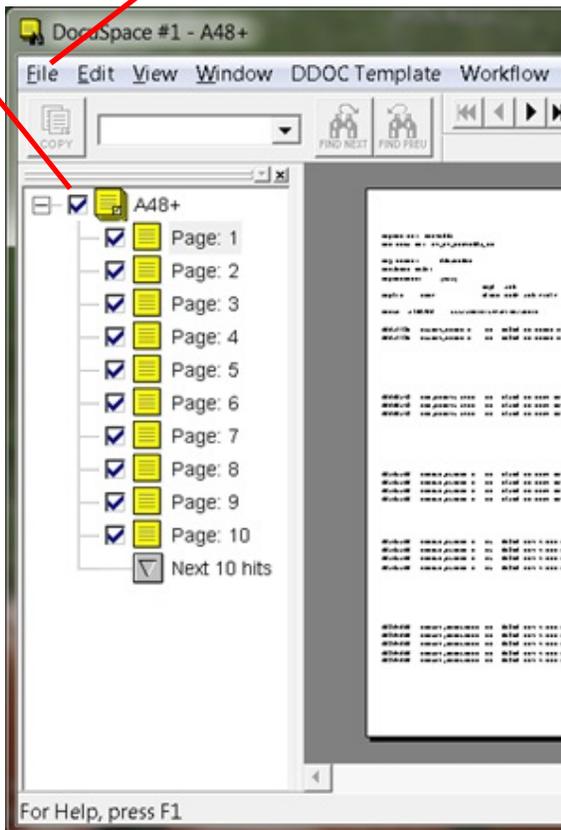
To e-mail an entire report or to e-mail selected pages of the report using the *double-click method* for opening the report:

16a. To e-mail the entire report, check the box to the left of the top folder. This action will select all pages of the report.

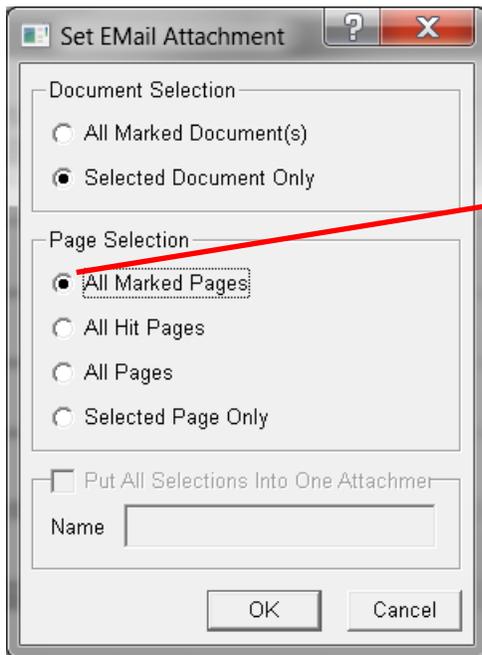
16a. To e-mail selected pages of the report, check only the box(es) to the left of the page(s) to be e-mailed.

—OR—

16b. Go to the “File” menu and select “EMail” or click the EMail button.



EMail button



16c. Choose the radio button "All Marked Pages" and click OK (or press Enter key).

Section 5 – Save Reports

It is recommended that you save your reports to your own network drive or computer for future reference because older reports in Cypress are purged at periodic intervals. In addition, saving reports allows you to share them with other departments as needed. For example, if your department is the home department for an employee who is paid 75% by your department and 25% by a second department, your department's payroll edit report will include both department funding sources for that employee. However, that employee will not appear at all on the second department's payroll edit report because the second department is not the home department. Thus, if you save your department's payroll edit report, then you can send your report to the second department so that department can confirm its funding source and thereby verify that the employee will be paid correctly.

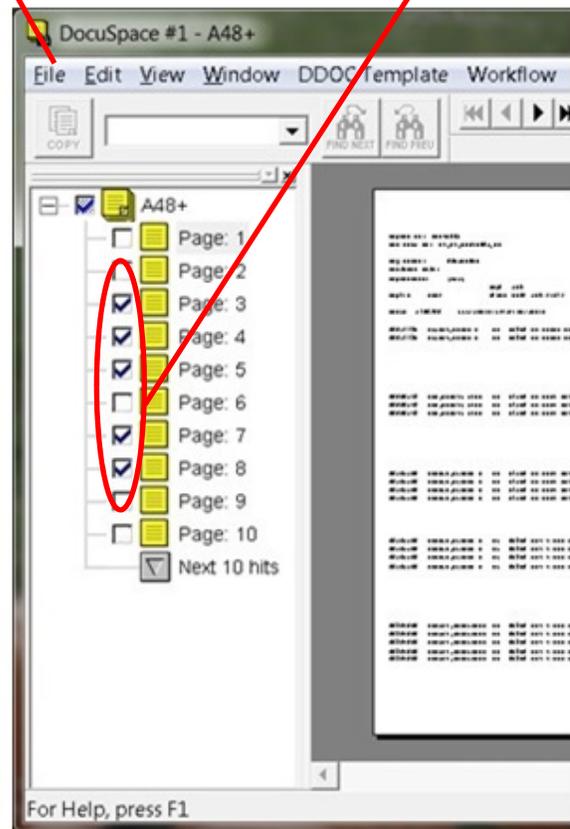
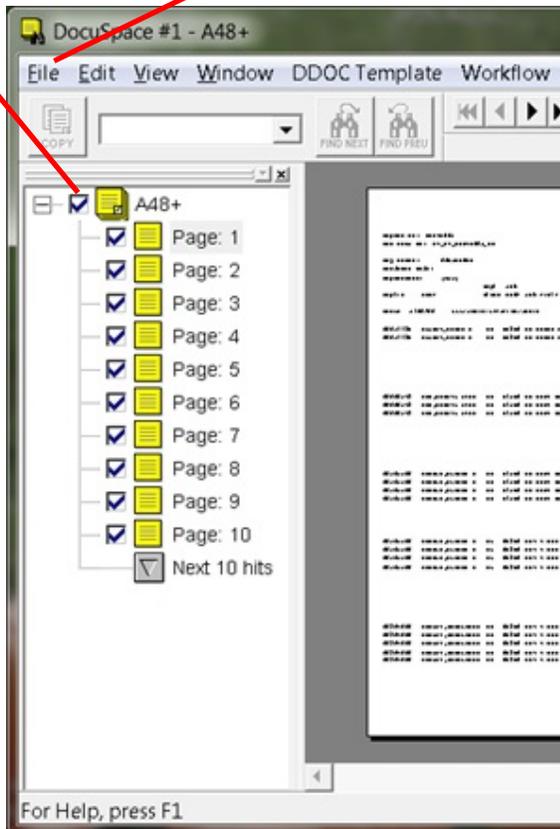
To save an entire report or to save selected pages of the report using the *double-click method* for opening the report:

17a. To save an entire report, check the box to the left of the top folder. This action will select all pages of the report.

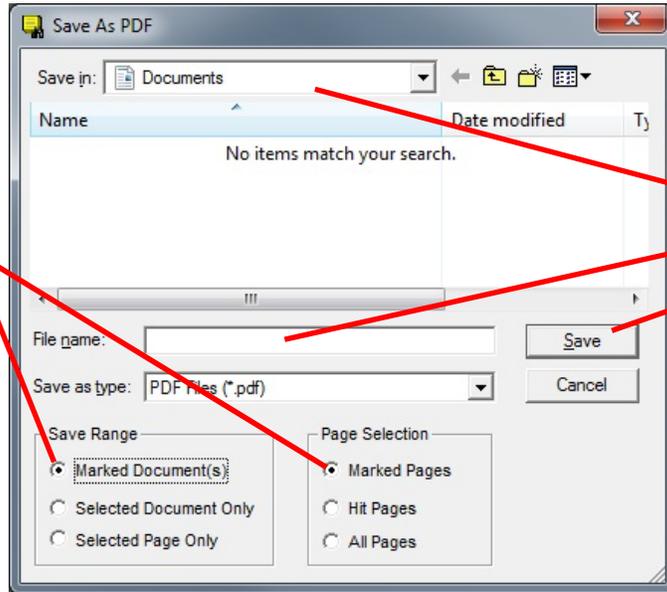
—OR—

17a. To save selected pages of the report, check only the box(es) to the left of the page(s) to be saved.

17b. Go to the "File" menu and select "Save As PDF".



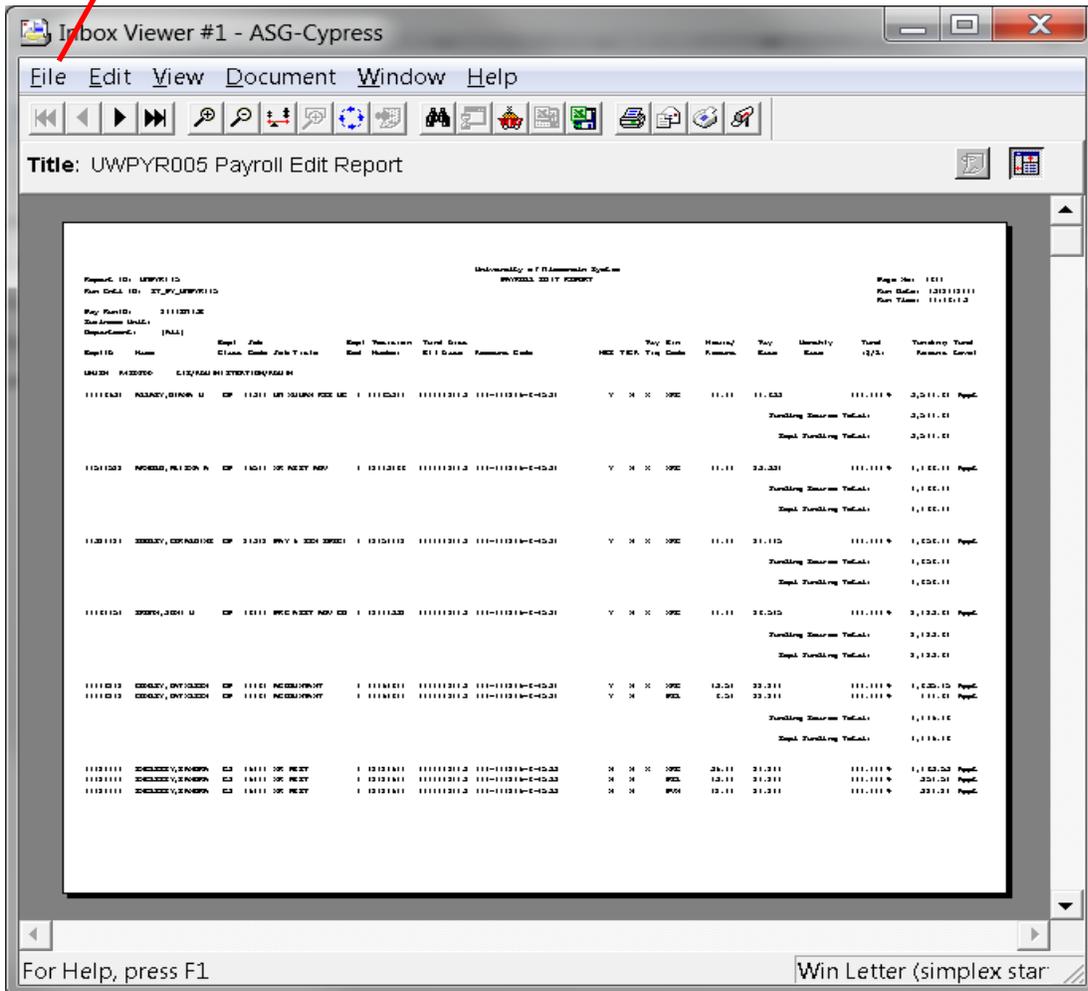
17c. Notice that the radio buttons “Marked Document(s)” and “Marked Pages” are chosen.

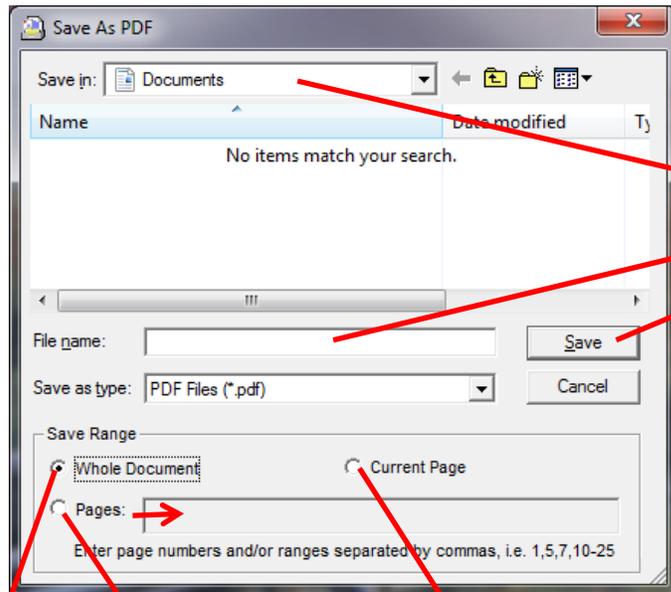


17d. Select the file location, enter a file name, and click “Save” (or press Enter key).

To save an entire report or to save selected pages of the report using the *full frame method* for opening the report:

18a. To save the entire report or to save selected pages of the report, go to the “File” menu and select “Save As PDF”.



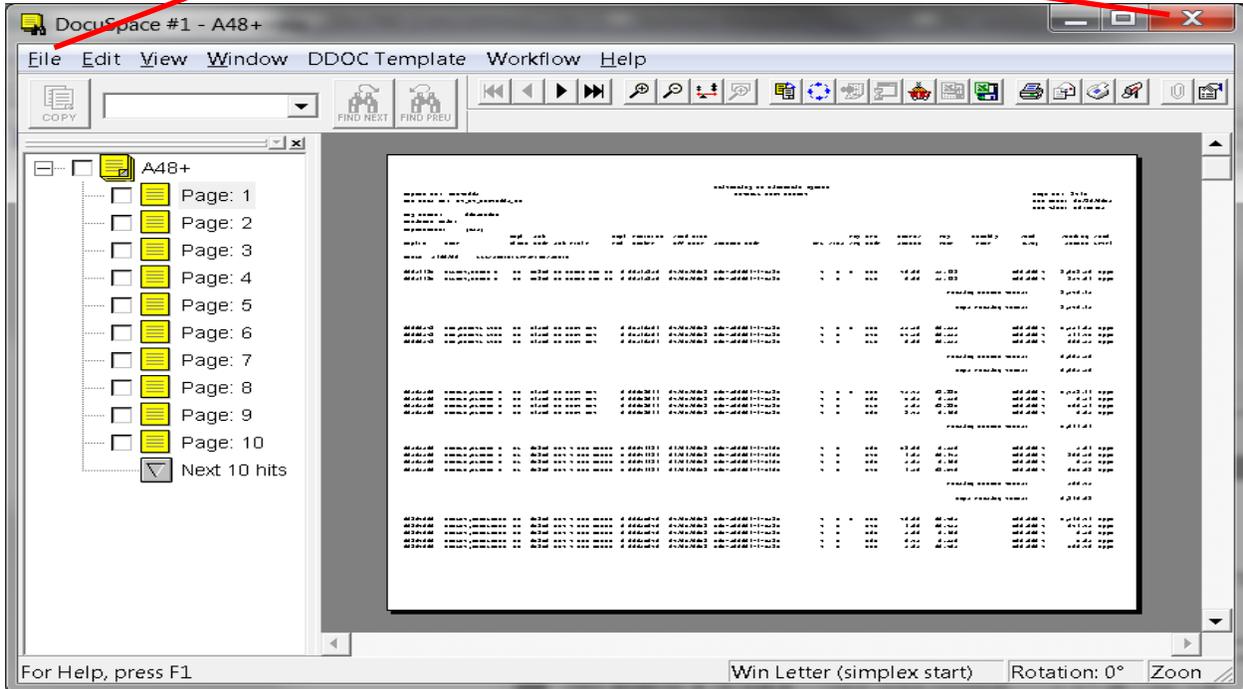


18c. Select the file location, enter a file name, and click “Save” (or press Enter key).

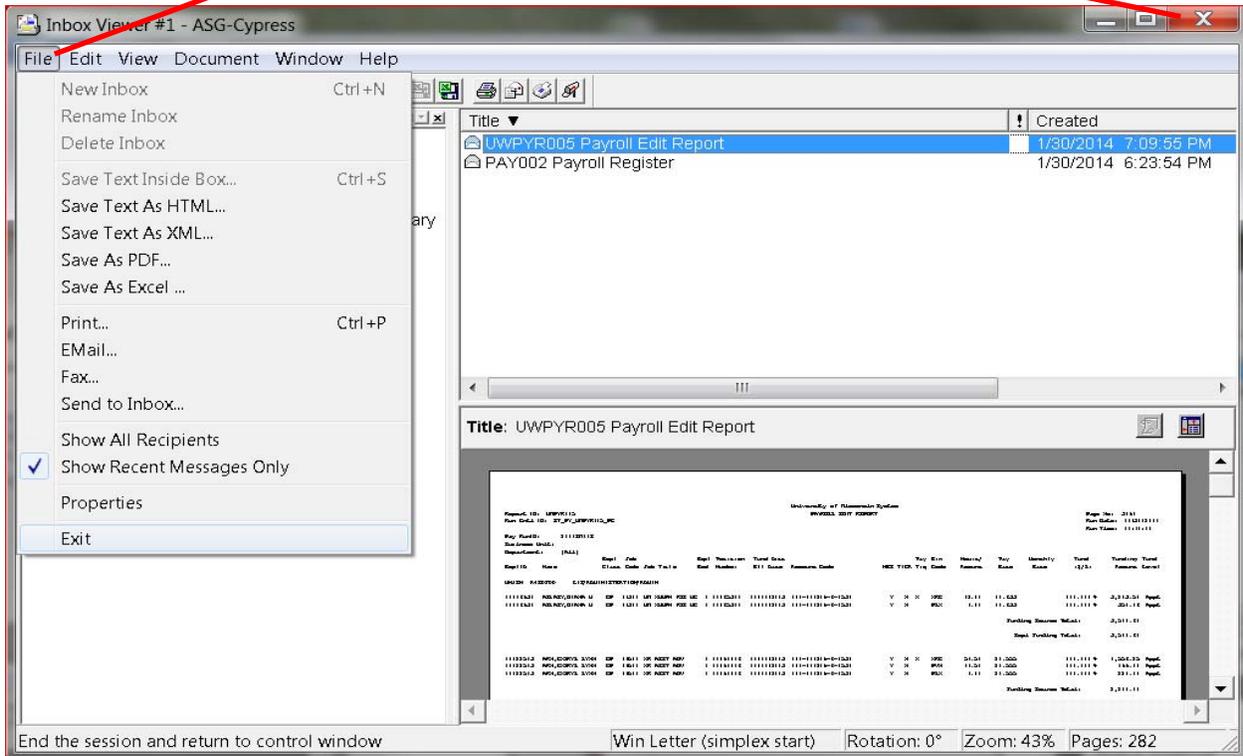
18b. To save the entire report, choose the radio buttons “Whole Document”; to save just the current page of the report, choose the radio button “Current Page”; to save selected pages of the report, choose the radio button “Pages” and enter the desired page numbers or page range.

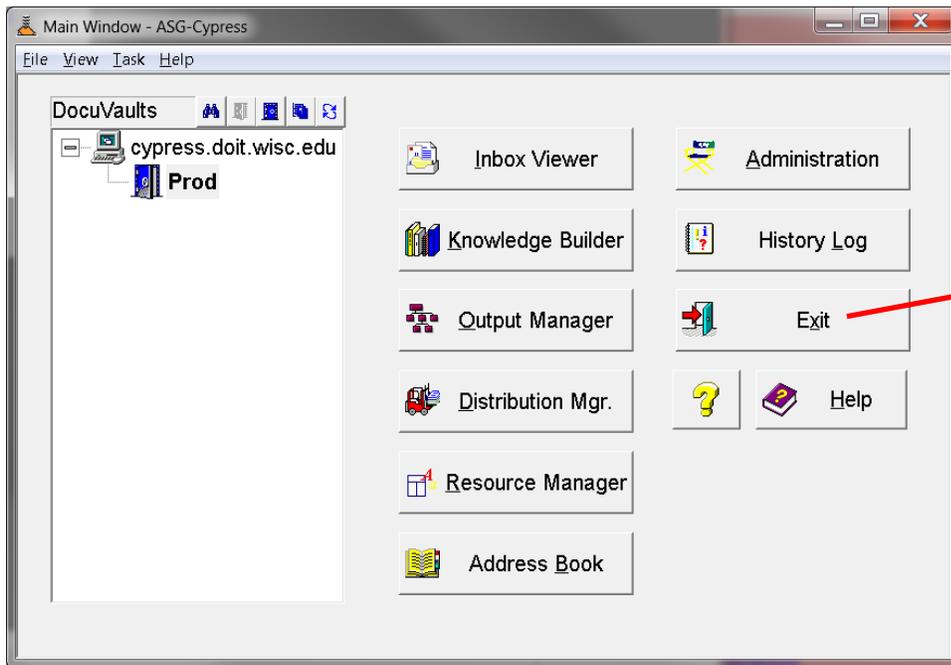
Section 6 – Exit the Inbox Viewer and Log Out of Cypress

19. To close the DocuSpace window, go to the “File” menu and select “Exit DocuSpace” or click the red X.



20. To close the Inbox Viewer, go to the “File” menu and select “Exit” or click the red X.





21. To close the Cypress client, click "Exit".

Composed by: L&S/JCF & CYHJ
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