

iReports Helpful Tips

When can I access the iReports Data Warehouse web site?

You can access the web site 24 hours a day, 7 days a week. Technical support for the web site is provided Monday through Friday from 7 a.m. to 7 p.m. CST. For assistance, please call Technical Support (TSC) at 1-800-6HELPER.

How often are documents updated on the site?

Documents are updated on Thursday following each Saturday billing cycle end date.

Users

1. If you have logged into iReports and only the Home tab is visible, please contact your Report Access Manager (RAM) to assign the Roles you need. Once assigned, the Tabs will display.
2. Once you have logged into the site, the Browser Back button does not work. Please utilize the “string” of links that are created as you open each area. Please see below.
[Harland Clarke>Billing_01>31550 – STAT ...>TR 725400000](#)
3. The “Monthly Waive Charge Report” can be located on the Billing Tab. Click the Billing Folder, then Bank Name, then Corp Reports. These reports may not follow a “calendar” month.
[Harland Clarke>Billing_01>02065 – PACL...>Corp Reports>](#)
4. To find a Billing report for a particular branch, enter a “string” in the Search field. Examples:
[AINVCE_TR_BRANCH#_CUSTOMER#_DATE](#) → [AINVCE_999999992_00049_122342_021211](#)
[AINVCE_TR_BRANCH#_CUSTOMER#_DATE](#) → [AINVCE_999999992_00049_122343*_021211](#)

Report Access Manager

1. You do not need to register. Simply log in with your User ID and Password.
2. If you are unable to log into the site, please contact TSC. Please confirm your correct email address has been set up.
3. If you are trying to “Approve” a new user, be sure to check the “Unapproved Users” box on the Frequently-Used Information tab **before** clicking on Search.
4. If you are in the process of assigning Roles but do not see the Assigned Roles Tab, be sure you have clicked the “Modify” button for the User. If you clicked the Modify button but still do not see the Assigned Roles Tab, scroll to the right to find the additional tabs to choose from.
5. If you clicked the Assigned Roles Tab and the screen is showing both the Available Roles and Assigned Roles but there are no roles to choose from, click the “GO” button on the Available Roles Tab to see the roles.
6. When creating, deleting, or assigning roles, click the Save button. Always scroll to the top of the screen to verify that the information has been saved. All messages, including error messages, will always appear at the top of the screen.
7. You do not have to set up each and every user. A new user can follow the Self-Registration process on the Log On screen. The new user will need to use their e-mail address as their Logon ID, choose their own password, and they must include the Harland Clarke Corp ID.
8. You will receive an e-mail notification when a new user has registered. The RAM will approve and assign roles to the new user. The new user will receive an e-mail once the RAM has completed these tasks.
9. If you create a new user from the beginning, you will not need to approve the user. You will only need to assign the roles.
10. You can define and confirm a new password for the user. You do not have to utilize the “Generate Password” button.

Financial Reports

1. If you have access to the Financial Reports Tab and the Report List looks like the one below, the setup needs to be corrected. Please contact Harland Clarke’s TSC.

