

Haystack™ Gold

Report Creation User Guide

Topics covered in this guide:

- **Default reports**
- **Custom Reports**
- **Generate a saved report**
- **Report Status**

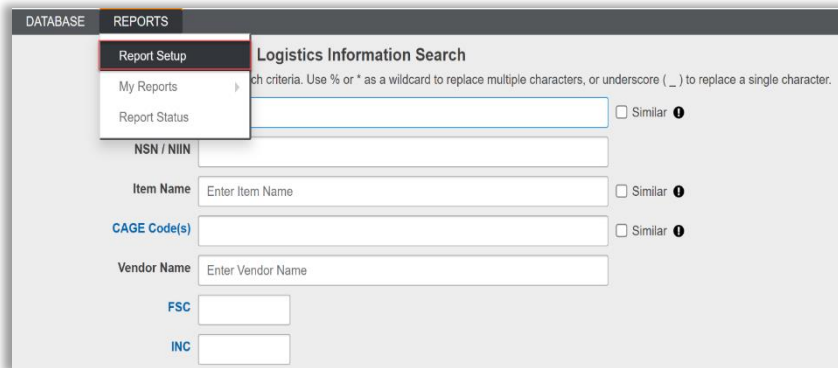
CREATE A DEFAULT REPORT

Create a standard report extracting pre-defined sets of content from Haystack™. You can extract data from multiple databases including:

- Federal Logistics Information System (FLIS)
- Commercial and Government Entity Code (CAGE)
- Canadian MCRL
- Canadian Procurement History
- DODAAC
- Federal Procurement Data System (FPDS-NG)
- Government Awards
- List of Items Requiring Special Handling (LIRSH)
- National Forging Tooling Database (NFTD)
- DoD Procurement History
- Supplier Requirements Visibility Application (SRVA)
- UK NATO Stock Numbers
- US Air Force DO49
- US Air Force D200F
- US Air Force SNUD
- US Army AMDF
- US Marine Corps SL-6
- US Navy APL/AEL
- US Navy NMDF
- US Navy WUC
- US Navy WUC S3

Step 1 – Report Identification

To generate a standard report requires the steps as outlined below. Select **Report Setup** from the **Reports** drop-down option at the top of the screen.



The screenshot shows the 'Logistics Information Search' interface. At the top, there are tabs for 'DATABASE' and 'REPORTS'. A dropdown menu is open under 'REPORTS', with 'Report Setup' selected. Below the menu, there is a search criteria help text: 'Search criteria. Use % or * as a wildcard to replace multiple characters, or underscore (_) to replace a single character.' The search form includes several input fields: 'NSN / NIIN', 'Item Name' (with placeholder 'Enter Item Name'), 'CAGE Code(s)', 'Vendor Name' (with placeholder 'Enter Vendor Name'), 'FSC', and 'INC'. There are also checkboxes for 'Similar' next to the 'Item Name' and 'CAGE Code(s)' fields.

Name your report by entering a **Title** and **Description** for the report. **Note:** Naming these fields are optional, although recommended for easy identification of your report.



The screenshot shows the 'Report Setup' form. At the top, there are tabs for 'DATABASE' and 'REPORTS'. Below the tabs, there is a header 'Report Setup' with a note: 'Fields marked with an asterisk (*) are required'. The form is divided into sections. The first section is 'Step 1 - Report Name'. Below this, there are two input fields: 'Title' (containing 'REPORT TITLE') and 'Description' (containing 'OPTIONAL DESCRIPTION FIELD'). At the bottom, there is a checkbox labeled 'Save report input on server?' which is checked. To the right of the checkbox is a text input field containing 'SAVED REPORT'.

The Saved Report Option seen here, highlighted in yellow and when the report is assigned a **name** your input details are saved to the server for future use. Simply check the box labeled **Save report on input server?** and provide a name for the saved report. Refer to the section on **Generating a report using a saved input file** to generate the report on demand.

Step 2 – Search Options

The **Search Options** section defaults to the FLIS database, simplifying the standard reporting process. Whether you choose the FLIS or select another database, you are presented with the search options specific to that database. Fixed Width and Comma-Delimited formats are included in the options to alleviate multiple steps.

Choose the **database** from which you wish to extract data and then select what your **search field** or input key will be (example: NSN/NIIN, CAGE Code, Part Number, etc.).

Report Setup Fields marked with an asterisk (*) are required

Step 1 - Report Name

Step 2 - Search Options

Database: Federal Logistics Information Service *

Search Fields: NSN or NIIN *

*** CHOOSE SEARCH FIELD(S) ***

NSN or NIIN

Part Number

CAGE

CAGE + Part Number Fixed Width

CAGE + Part Number Comma-delimited

Step 3 - Input Options

Step 3 – Input Options

For your **Input Options**, you have the ability to select a file as the input, or manually enter search terms such as Part Numbers, NSNs or CAGE Codes on the same screen. When manually entering search terms you are limited to 500. The field also supports cut and paste up to 500 line items.

Input files for generating reports must be text files. The input data can be created in applications such as Microsoft Excel or Word, but must be saved as a text (.txt) file, with one search term per line, before it can be loaded into the report processor. The input file is limited to 50,000 line items.

Upon selecting your input file or manually entering your search criteria click the **Upload** button.

Step 3 - Input Options

File Name: Choose File | No file chosen *

The input file is limited to 500000 line items and must be a text file with one search key or group of search keys (e.g., CAGE + Part Number) per line. [Example](#)

Enter Input File Name

005198144
005347553

Upload

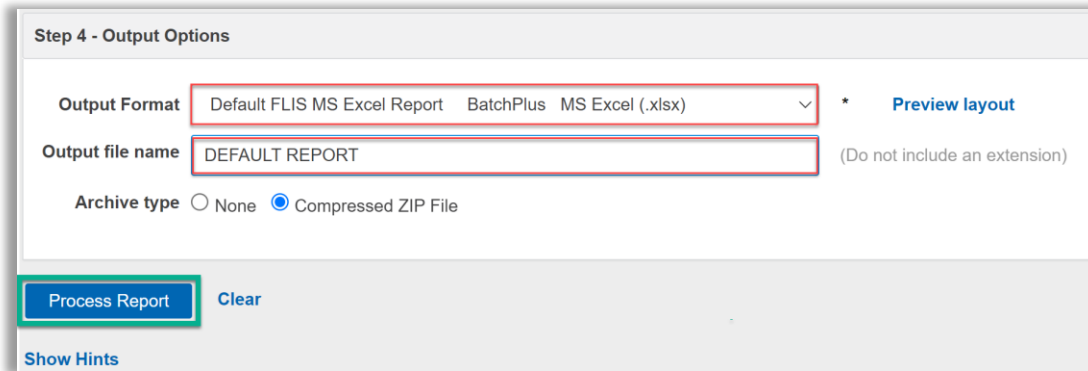
Exact Part Number Matching (with punctuation) Include my search terms in the report

Note: You can select **Exact Part Number Matching** (with punctuation) to create an output that only includes the **Input Key Type** you selected from the pull-down menu that matches a FLIS record with the exact same key type, including dashes, slashes, spaces, etc.

Additionally, when you select **Include my search terms in the report**, the **Search Term** you enter appears in the batch report along with the NIIN, which is the default output part reference. You can, therefore, map the NIIN back to the search term you used in the **Search Fields** option.

Step 4 – Output Options

The **Output Options** section provides you with a variety of options to choose from, including default reports by S&P Global, or reports designed by your internal user. The report options utilize common formats such as Microsoft Access or Excel, text delimited or HTML. In this step, select your desired output and provide an output name for your report. To review the sections and fields of data that will be provided in your report, select **Preview Layout** for an on-screen display. Once you have made your desired selections, press the **Process Report** button to begin running your report. Note that you can continue working in Haystack while the report is being generated.



Step 4 - Output Options

Output Format: Default FLIS MS Excel Report BatchPlus MS Excel (.xlsx) * [Preview layout](#)

Output file name: DEFAULT REPORT (Do not include an extension)

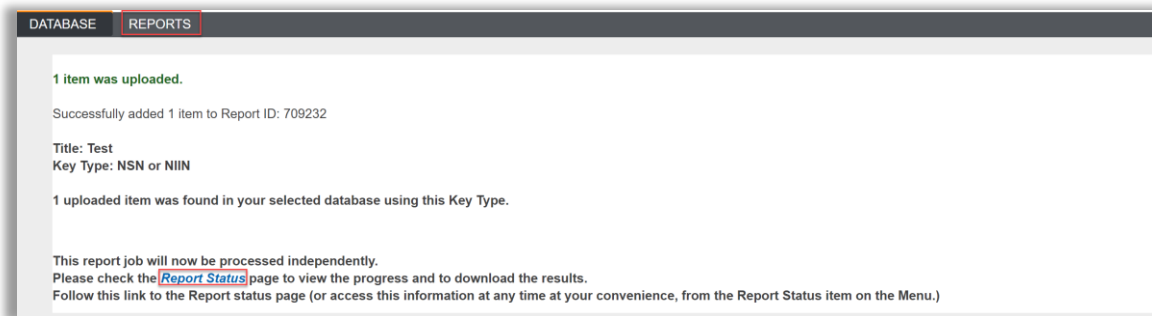
Archive type: None Compressed ZIP File

[Process Report](#) [Clear](#)

[Show Hints](#)

After clicking the **Process Report** button, you will have the option to view the report status from this page using the provided link highlighted below.

For any of the reporting options, you can access completed and/or pending reports by selecting **Report Status** from the **Reports** drop-down located at the top of the screen.



DATABASE **REPORTS**

1 item was uploaded.

Successfully added 1 item to Report ID: 709232

Title: Test
Key Type: NSN or NIIN

1 uploaded item was found in your selected database using this Key Type.

This report job will now be processed independently.
Please check the [Report Status](#) page to view the progress and to download the results.
Follow this link to the Report status page (or access this information at any time at your convenience, from the Report Status item on the Menu.)

CREATE A CUSTOM REPORT

To customize a report that organizes only the information you want, rather than all possible retrieved data (for example, you may only want the NSN and Part Number or the Part Number and CAGE Code from the FLIS database in your report), select **My Reports**→**Custom Reports** from the **Reports** drop-down option located at the top of the screen.

Logistics Information Search

Report Setup

My Reports

Custom Reports

Report Status

Saved Reports

NSN / NIIN

Item Name

CAGE Code(s)

Vendor Name

FSC

INC

The Custom Report screen displays details on custom reports you have created. From this screen, you have the option to create, edit or delete a custom report. To begin designing your custom report, select the **Create Custom Report** button.

My custom reports

Create custom report

Report Name	Database	Output Type	Modified Date
DLA PRO H	Federal Logistics Information Service	MS Excel	05/18/2022
Part to NSN	Federal Logistics Information Service	MS Excel	05/18/2022
HG3 May	Federal Logistics Information Service	MS Excel	05/05/2022
RENK	Federal Logistics Information Service	MS Excel	05/04/2022
RFQ WireFrame	Federal Logistics Information Service	MS Excel	04/21/2022
Export Regs	Federal Logistics Information Service	MS Excel	04/19/2022
Cage WS	Federal Logistics Information Service	MS Excel	04/07/2022
FT Custom Report Temp 202203	Federal Logistics Information Service	MS Excel	03/10/2022
HG3 - March	Federal Logistics Information Service	MS Excel	03/03/2022
NK030322	Federal Logistics Information Service	MS Excel	03/03/2022
Mindy FPDS	FPDS-NG	MS Excel	02/25/2022
NKTest 020322	Federal Logistics Information Service	MS Excel	02/03/2022
NK WPS2	Federal Logistics Information Service	MS Excel	11/18/2021
NK Sotic	Federal Logistics Information Service	MS Excel	11/02/2021
NKSRVA	SRVA (Supplier Requirements Viability Application) CLA Fore...	MS Excel	11/02/2021

Complete the **Create New Report Form** including the following information:

- **Database** - From which database would you like to extract data?
- **Report Name** - The name which will display on your list of **My custom reports**.
- **Description** - (optional)
- **Type** – Defines output format (Example – Microsoft Access or Excel)

The screenshot shows a web form titled "Create new report". It contains four input fields, each outlined in red. The "Database" field is a dropdown menu with "Federal Logistics Information Service" selected. The "Report Name" field is a text box containing "Custom Report for Project Haystack 6.2". The "Description" field is a larger text box containing "This report contains current Procurement History and Archived Procurement History". The "Type" field is a dropdown menu with "MS Excel" selected.

To build the **Custom Report Layout**, begin by first selecting a data source from the left-most column, and then select the sections, or fields within those sections, to populate your report.

(Note that these sections and fields are representative of the data within the database you chose when first creating your report). You have the option of selecting an entire section, or simply selecting just those fields you wish to add to your report. As you make your selections you will notice them being populated in the right-most column.

In the right-most column, you have the ability to move your sections and fields by using the up and down **arrows** – and the ability to remove a line item by pressing the **x**. Upon completion, select **save** to complete the layout, and then **save** to finish the custom report.

The screenshot shows a web interface titled "Create new layout". It is divided into three main columns. The left column is a scrollable list of sections, with "Procurement History Archive" highlighted in blue. The middle column is titled "Select the sections or fields you want to appear in your report" and contains a list of items with checkboxes, including "Procurement History Archive", "FSC", "NIIN", "SOS", "Date", "Contract Number", "PRC", "UII", "Price", "Quantity", "Total Price", "CAGE", "Vendor Name", "Contract X", "Purchase Requisition Number", "Requisition Number", and "Contract Status". The right column is titled "Selected sections and fields" and contains a list of the same items, with "Procurement History" and "Procurement History Archive" highlighted in red. To the right of this list are up and down arrows for reordering and an 'x' icon for removal. A "Collapse All" link is also present.

Your report layout has now been saved and can be used to run a new report by selecting **Reports→Report Setup**. Proceed through all steps however, in step 4, **Output Options**, select the desired **named custom report** as your **Output Format**. Custom reports can be located when selecting **My Reports→Custom Reports** where you have access to edit or delete the report layout.

GENERATE A SAVED REPORT

The **generate a report using a saved input file** option is valuable when monitoring a series of NSNs or Part Numbers for change over time. This option allows you to run a report using the **report setup** feature and save that report with the input file being used, to run whenever required. This feature saves you time and eliminates keystrokes in setting up a new report each time when using the same input file.

Report Setup Fields marked with an asterisk (*) are required

Step 1 - Report Name

Title REPORT TITLE

Description OPTIONAL DESCRIPTION FIELD

Save report input on server? Report name (required for saved reports) SAVED REPORT

Follow the steps to create a standard, pre-defined report as outlined in **Step 1 – Report Identification**

Select the checkbox to **save a report on the server**; then provide a **Report Name**.

To run this report in the future, simply select **My Reports**→**Saved Reports**, to locate your previously saved report..

Logistics Information Search

Report Setup

My Reports Custom Reports Saved Reports

Report Status

NSN / NIIN

Item Name Enter Item Name

CAGE Code(s)

Vendor Name Enter Vendor Name

FSC

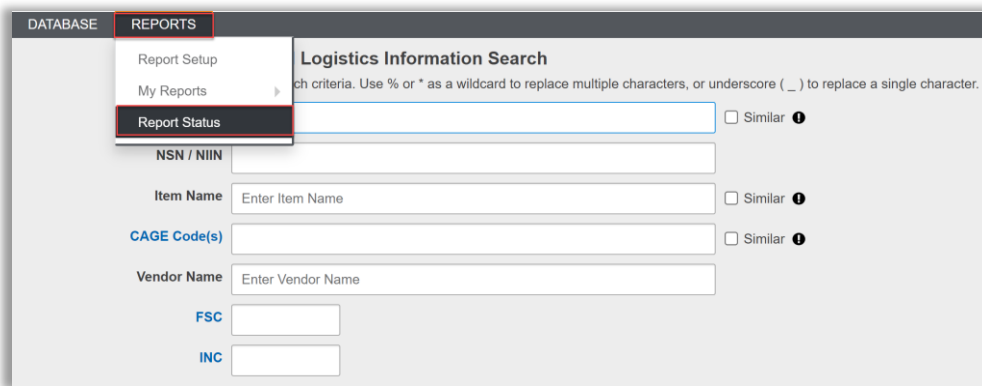
INC

Select the desired report and click **Submit**. By saving the report it creates a single click option to process the report when processing the same data repeatedly to monitor or track changes. You can find and open your report from the **Report Status** page.

	Report Name	Database Name	Creation Date	Key Count	Key Name	Report Type	Report Format Name
<input type="button" value="Submit"/>	HG3 May	Federal Logistics Information Service	2022-05-05	230	Part No.	BatchPlus	HG3 May
<input type="button" value="Submit"/>	RENK 2	Federal Logistics Information Service	2022-05-04	239	Part No.	BatchPlus	RENK
<input type="button" value="Submit"/>	TD DLA Imported Part List 5-4-2022	Federal Logistics Information Service	2022-05-04	1182	Part No.	BatchPlus	

REPORT STATUS

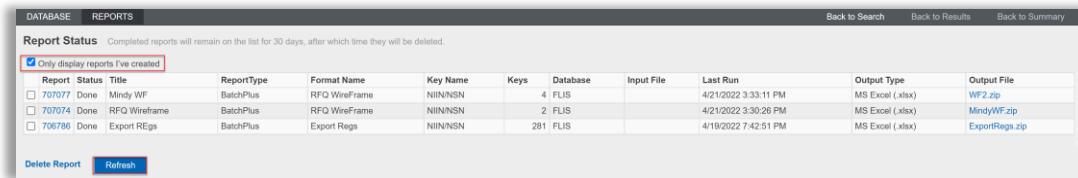
For any of the reporting options, you can access completed and/or pending reports by selecting **Report Status** from the **Reports** drop-down located at the top of the screen.



The screenshot shows the 'REPORTS' menu with 'Report Status' selected. Below the menu is a search form titled 'Logistics Information Search'. The form includes a search criteria input field, a 'Similar' checkbox, and several other input fields: 'NSN / NIIN', 'Item Name', 'CAGE Code(s)', 'Vendor Name', 'FSC', and 'INC'. Each of these fields has a 'Similar' checkbox next to it.

Note: if your report status is pending or in progress, press the **refresh** button at the bottom of the page to see an updated status.

Show only your reports by choosing **Only display reports I've created** checkbox.



The screenshot shows the 'Report Status' page. At the top, it says 'Report Status' and 'Completed reports will remain on the list for 30 days, after which time they will be deleted.' Below this is a checkbox labeled 'Only display reports I've created' which is checked. The main content is a table with the following columns: Report, Status, Title, ReportType, Format Name, Key Name, Keys, Database, Input File, Last Run, Output Type, and Output File. There are three rows of data in the table. At the bottom of the table, there are 'Delete Report' and 'Refresh' buttons.

Report	Status	Title	ReportType	Format Name	Key Name	Keys	Database	Input File	Last Run	Output Type	Output File
707077	Done	Mindy WF	BatchPlus	RFO WireFrame	NIINNSN	4	FLIS		4/21/2022 3:33:11 PM	MS Excel (.xlsx)	WF2.zip
707074	Done	RFO Wireframe	BatchPlus	RFO WireFrame	NIINNSN	2	FLIS		4/21/2022 3:30:26 PM	MS Excel (.xlsx)	MindyWF.zip
706786	Done	Export REgs	BatchPlus	Export Regs	NIINNSN	281	FLIS		4/19/2022 7:42:51 PM	MS Excel (.xlsx)	ExportRegs.zip

If your batches/reports are very large or become time consuming to process, please consider inquiring about our **Haystack XML Web Service** or **Data Extracts**. Contact your Account Manager today or call Customer Care to be directed to the right place.

- Haystack XML Web Services is an easy-to-use, effective tool for integrating detailed parts and logistics data into organizations' business systems and workflows.
- With Haystack Web Services, predefined part and logistics data is accessible on demand, using XML communication via a secure connection to Haystack Gold.

This guide is designed to step you through each report option at your own pace. However, if you need additional assistance, please call Customer Care @ 1-800-447-2273, 24 hours a day Monday – Friday and we will be happy to assist you with any of your S&P Global product questions.