Haystack™ Gold

Report Creation User Guide

Topics covered in this guide:

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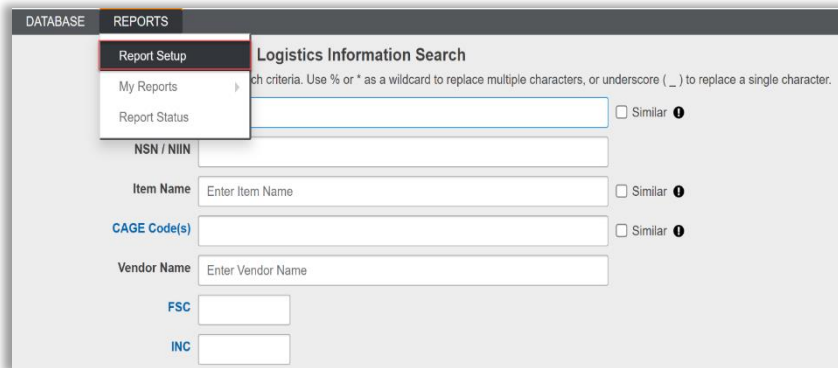- ➢ **Report Status**

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

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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.

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 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.

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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.).

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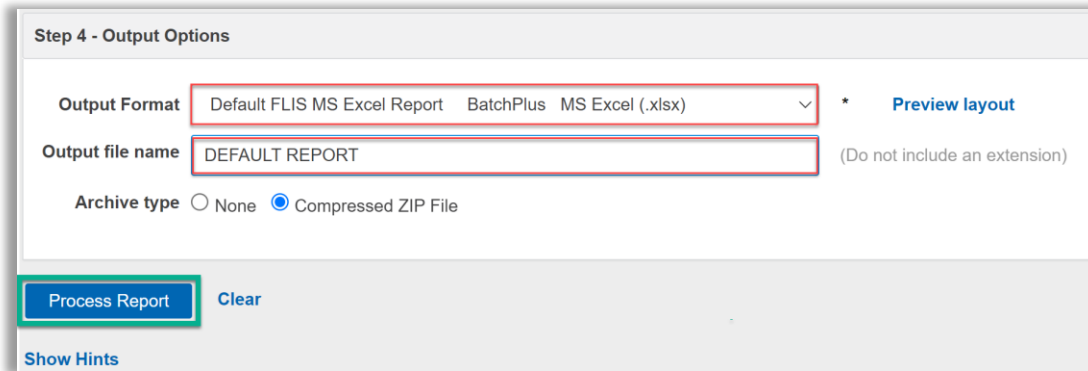
Note: You can select **Exact Part Number Matching** (with punctuation) to create an output that only includes the **Input Key Type** you selected from the pull-down menu that matches a FLIS record with the exact same key type, including dashes, slashes, spaces, etc.

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.

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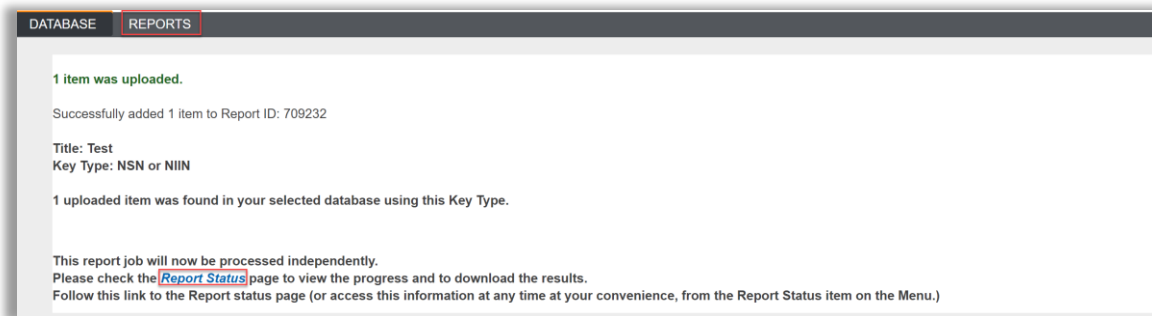
After clicking the **Process Report** button, you will have the option to view the report status from this page using the provided link highlighted below.

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.

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.

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.

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)

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.

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.

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..
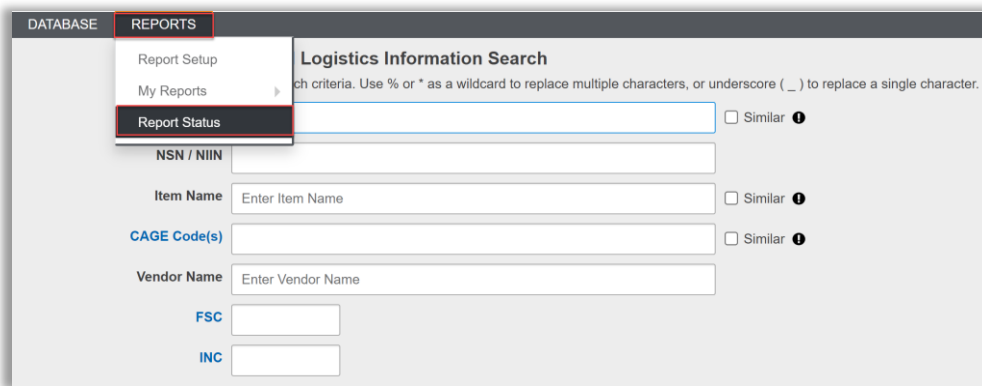

Select the desired report and click **Submit**. By saving the report it creates a single click option to process the report when processing the same data repeatedly to monitor or track changes. You can find and open your report from the **Report Status** page.
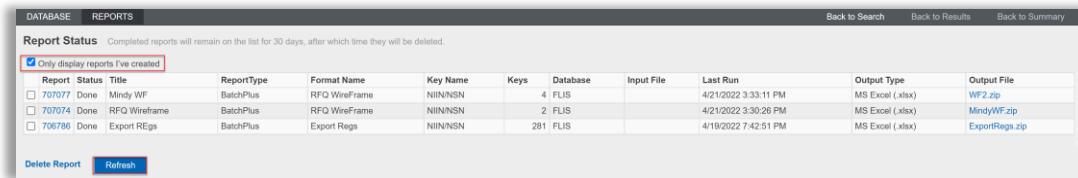
REPORT STATUS

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.

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.

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.

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