



## West Virginia DEPARTMENT OF EDUCATION

# WVEIS Navigation, Tips & Tricks

Presented by Sam Pauley, School Operations Officer

May 17, 2022

1

## WVEIS Navigation

- WVEIS menus were historically set up by RESA WVEIS Contacts
  - Menus are mostly consistent between counties within a RESA, but not always from a county in one RESA to a county in another RESA.
  - For that reason, it can be very helpful to ask your WVEIS County Contact to turn on “WVEIS Navigation” for your access.
- WVEIS Navigation allows users to enter a WVEIS program identifier to “navigate” directly to the program instead of having to drill down into the menus to find the program.
  - Example:
    - To access the Journal Entry Input program without navigation, Boone County users must enter “1, 1, 1, 2”
    - To access with navigation, all FMS users in any county can type “GNL.401” and “enter” to move directly to the Journal Entry Input program, regardless of the current menu they are on.



West Virginia DEPARTMENT OF  
EDUCATION

2

2

## WVEIS Navigation (Continued)

- A word of CAUTION: Navigation may allow an individual to access a menu to which they otherwise may not have access.
- Generally, most treasurers/CSBOs would have access to all non-student WVEIS data,
- Other users may need to have their access restricted dependent upon their duties. As a result, navigation may not be a good idea for everyone in finance. Be sure to discuss with your WVEIS County Contact.
- Some commonly used programs are:
  - GNL.601: Account Balance & Transaction Detail Lookup
  - GNL.401: Journal Entry Input
  - GNL.575 or GNL5750: G/L Report Writer Submittals with and without offsets
  - ACP.465: Lookup Vendor Activity
  - PAI.420: Payroll Check Lookup
  - PUR.450L: Purchase Order Lookup



3

## WVEIS Navigation (Continued)

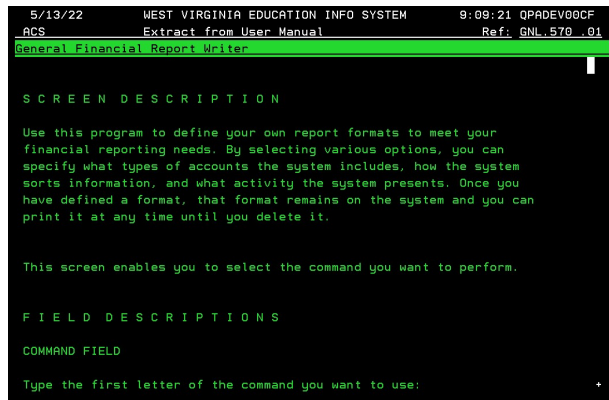
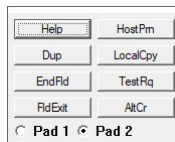
- Command Menu (CMD) includes several useful programs:
  - PASSWORD: Change password
  - OUTQ: Display reports on printer
  - DSPMSG: Display messages
  - MYREPORTS: Displays all reports in spool file
  - ALLJOB: Displays all submitted jobs
- Common navigation commands:
  - F3 – Can be used to exit most programs without saving. However, some menus require the use of “E” to exit.
  - F4 – WVEIS fields with blue writing usually allow you to “index” on the field to bring up a list of items. Put your cursor in the field and hit “F4” to bring up the index list
  - F5 - Refresh



4

## WVEIS Navigation (Continued)

- Help Menu – To access the WVEIS help menu, right-click the mouse within the WVEIS window to show a pop-up window, click the “Pad 2” option, then click “Help.”



5

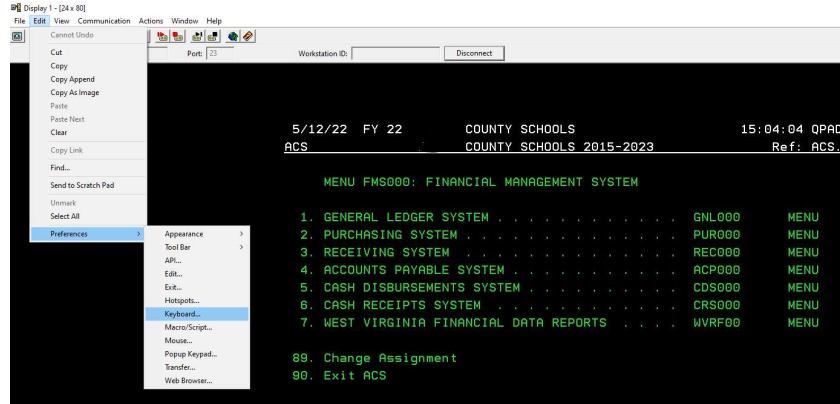
## Keyboard Mapping

- WVEIS users can customize how their keyboard interacts with WVEIS
- This is usually set up by the WVEIS county contact when new users are added, so the user may not be aware of the current keyboard setup
- Keyboards are customized using via Edit>Preferences>Keyboard then clicking “customize” (see next screen)



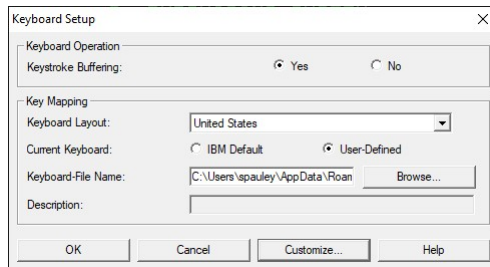
6

## Keyboard Mapping (Continued)



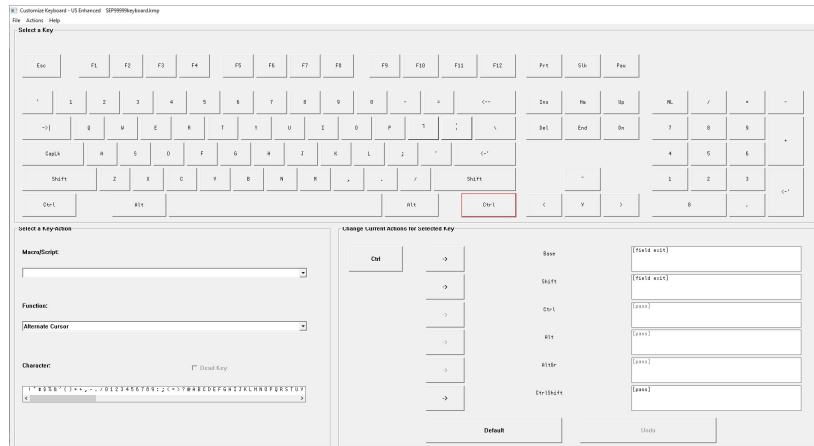
7

## Keyboard Mapping (Continued)



8

## Keyboard Mapping (Continued)



9

## WVEIS Commands

- Most WVEIS data input screens utilize common commands
  - A = Add
  - C = Change
  - D = Delete
  - L = Lookup
  - F = From
  - T = Through
  - E = Exit
  - # = Renumber
- The “From/Through” commands are extremely helpful when you need to make changes to multiple lines of data (i.e., journal entry lines, PO lines, etc.).

10

## WVEIS Commands (Continued)

- The “#” command is extremely useful when you need to renumber PO lines or Journal Entry lines as you revise those documents.
  - For instance, when entering a PO, if you decide to add a line between rows 2 and 3, WVEIS will renumber the new line as “0002.001”
  - To clean up that numbering, you can add “#” to the beginning of any line of data in the PO, then hit enter, to have the system automatically renumber the rows of data.
  - Also, useful if a line is deleted
- See next slide for example of available commands on a journal entry



11

## WVEIS Commands (Continued)

```

5/12/22  FY 22          COUNTY SCHOOLS          15:41:51 QPADEV0024
FMS                               Ref: GNL.401L.01
JUL AJE  1 PERKINS FINAL INDIRECT COST SHARE FOR 20  Total:          .00
CMD      A C C O U N T          DEBIT    CREDIT
-----
BEGIN
0001.000 61.50110.76191.911.001.0000.0000.00          93.06
0002.000  11.00000.05261.009.000.0000.0000.00          93.06
0003.000  ENTRY TO RECORD INDIRECT COST SHARE
0004.000  FOR THE PERKINS 2021 GRANT.
0005.000  61.00000.00411.004.000.0000.0000.00          93.06
0006.000  11.00000.00411.004.000.0000.0000.00          93.06

COMMANDS: A C D L F T # E          POSITION: +n,n.n,-n, Roll-up, Roll-down

```



12

## WVEIS Report Writer Tips/Tricks

- WVEIS report writers provide a couple of very helpful tools
  - Copy an existing report setup (GNL.570)
    - When setting up a new report, you have the option to copy an existing report so you don't have to create it from scratch
    - In the GNL.570 program, use the "A" command to add a report, but type in a report identifier that already exists (the one you want to copy), then change "auto next record" in the bottom right corner to "C" for copy
    - This will then start the creation of an identical copy of the existing report but will blank out the original Report ID and require you to enter a new one.
    - You can then change the report options that you want for the new report
    - Really helpful if you have created custom reports for another director and you want to create a new one for another director.
  - ?
    - You can utilize a question mark within report writers to mask digits of an account element.
    - You can't use account element ranges if you utilize a "?" mask ("To" field must be left blank)



13

## WVEIS Report Writer Tips/Tricks (Continued)

```

5/12/22  FY 22          COUNTY SCHOOLS          15:47:25 QPADEV0024
FMS          General Financial Report Writer          Ref: GNL.570 .01

A          Report Identifier: EXPENSES
Add
Change          For Print:
Delete          Report Month:          APRIL
Lookup
Print
Index
End

Auto Next Record? C
  
```



14

## WVEIS Report Writer Tips/Tricks (Continued)

```

5/12/22  FY 22          COUNTY SCHOOLS          15:51:48  QPADEV0024
FMS          General Financial Report Writer          Ref: GNL_570_11
Report ID:          _____
Report Title:      SELECTED EXPENSES COMPARISON
Items to Print:    B
                  A - Print account number only.
                  T - Print account title only.
                  B - Print both the account number and the title.

Report Sequence Logic:
Element Name      New  Print  Offset  Select: From or
(defines sequence) Page Total From To   Only . . . . To
1. FUND           N   Y    0    0    71
2. PROJECT        N   Y    0    0    52010
3. PROGRAM/FUNCTION N   Y    0    0
4. OBJECT         N   Y    0    0    010    999
5. LOCATION       N   Y    0    0
6. COST CENTER    N   N    0    0
7.                -   -    0    0
8.                -   -    0    0
9.                -   -    0    0
10.               -   -    0    0
(*TYPE' for financial statement classification.)
Mode: Add          F3=Exit  F4=Index  F5=Reset  F12=Cancel  Cancel? N
    
```



15

## WVEIS Report Writer Tips/Tricks (Continued)

```

5/12/22  FY 22          COUNTY SCHOOLS          15:57:57  QPADEV0024
FMS          General Financial Report Writer          Ref: GNL_570_11
Report ID:          EXPENSES
Report Title:      SELECTED EXPENSES COMPARISON
Items to Print:    B
                  A - Print account number only.
                  T - Print account title only.
                  B - Print both the account number and the title.

Report Sequence Logic:
Element Name      New  Print  Offset  Select: From or
(defines sequence) Page Total From To   Only . . . . To
1. FUND           N   Y    0    0    71
2. PROJECT        N   Y    0    0    52010
3. PROGRAM/FUNCTION N   Y    0    0
4. OBJECT         N   Y    0    0    010    999
5. LOCATION       N   Y    0    0
6. COST CENTER    N   N    0    0
7.                -   -    0    0
8.                -   -    0    0
9.                -   -    0    0
10.               -   -    0    0
(*TYPE' for financial statement classification.)
Mode: Change      F3=Exit  F4=Index  F5=Reset  F12=Cancel  Cancel? N
    
```



16



## WVEIS Report Writer Tips/Tricks (Continued)

- Offsets are used in report writers to control how data is summarized in the resulting report
  - Example: if the “program/function” line of a report writer shows offset from “2” to “3” and the “print total” option is flagged as “Y,” the resulting report will provide a summary of the accounts by 2<sup>nd</sup> and 3<sup>rd</sup> digit of the program/function code
  - Helpful when running reports at year-end by function, where you want the data summarized without looking at the first digit or last two digits of the function.
- Kim Harvey has recorded EMS and FMS Report Writer trainings that can be found on Microsoft Stream (MUCH more detail)
  - FMS: <https://web.microsoftstream.com/video/91dad223-955c-46e7-af24-8e6adb4b2faf>
  - EMS: <https://web.microsoftstream.com/video/23bb0d88-8662-4314-8353-5ca2028af2cf>



17

## WVEIS Report Writer Tips/Tricks (Continued)

```

5/12/22  FY 22          BOONE COUNTY SCHOOLS          16:06:42 QPADEV0024
FMS              General Financial Report Writer      Ref: GNL_570_11

Report ID:      EXP FOR ANNUAL
Report Title:   EXPENSES FOR ANNUAL REPORT
Items to Print: B
                A - Print account number only.
                T - Print account title only.
                B - Print both the account number and the title.

Report Sequence Logic:
Element Name    New  Print  Offset  Select: From or
(defines sequence) Page Total From To  Only ... To
1. FUND         N    Y     1     2     11
2. PROGRAM/FUNCTION N    Y     2     2
3. PROGRAM/FUNCTION N    Y     2     3     10000  99999
4. OBJECT       N    N     0     0     100    999
5. LOCATION     N    N     0     0
6. COST CENTER N    N     0     0
7. SUBJECT     N    N     0     0
8. EXPANSION   N    N     0     0
9.             N    N     0     0
10.            N    N     0     0
(*TYPE' for financial statement classification.)

Mode: Lookup                                Cancel? N
    
```



18

## WVEIS Printing

- Ask your WVEIS County Contact for assistance if reports do not print legibly or to the correct scale/layout.
- They can create a simple print session for you that allows you to easily change the printer you want to use, including print to PDF.
  - Note that this does not support Forms Print for things like W-2 and 1099 printing. Such forms require a virtual print session (VQ printer), which your WVEIS County Contact should be able to set up for you.
- You may or may not need to have “print overrides” enabled on your WVEIS account.
  - Allows user to modify printer/output queue on the fly
  - Allows user to modify print output options like:
    - Lines per page
    - Characters per inch
    - Form size
    - Number of copies



19

## WVEIS Printing (Continued)

```

5/13/22  FY 22      COUNTY SCHOOLS      09:26:23  QPADEV00CF
ACS          Submittal Prompt          Ref: ACS.JSET.02

Job:   WVF.550   Special Projects Worksheet

          Is ready to run IN BATCH MODE
          Please fill in the requested data (if any)
          Or cancel if you do not wish to run this now

JOBQ  :          1          JOBQ      Library
          1 - Normal      QNORMAL3   ACS400
          2 - High Priority QNORMAL3   ACS400
          3 - Night       QNIGHT     ACS400

Number of copies:  1 (maximum allowed = 10 )

Change printer overrides:  Y (Y/N)          Cancel?  N
  
```



20

## WVEIS Printing (Continued)

```

5/13/22  FY 22      COUNTY SCHOOLS      09:29:37  QPADEV00CF
ACS      Submittal Prompt      Ref: ACS.JSET_03

Job:  WVF.550  Special Projects Worksheet

Printer . . . . . PRT01      (*JOB, Name)
Output Queue . . . . . PRT01      (*JOB, Name)
Queue Library . . . . . QUSRSYS      (*LIBL, Name)
Form Type . . . . . *STD      (*STD, Name)

Align Forms . . . . . N      (Y/N)
Hold Before Printing N      (Y/N)
Save After Printing N      (Y/N)

Lines Per Page . . . . . 66      (66, 88, 1-255)
Page Overflow Line . . . . . 60      (60, 80, 1-255)
Lines Per Inch . . . . . 6.0      (6, 8, 4, 9)
Characters Per Inch 10.0      (10, 15, 5, 12, 13.3, 16.7, 18, 20)

Form Size . . . . . 2      (1=8.5x11, 2=14x11,
                               3=11x8.5, 4=Other)
Number of Copies . . . . . 1      (1-010)

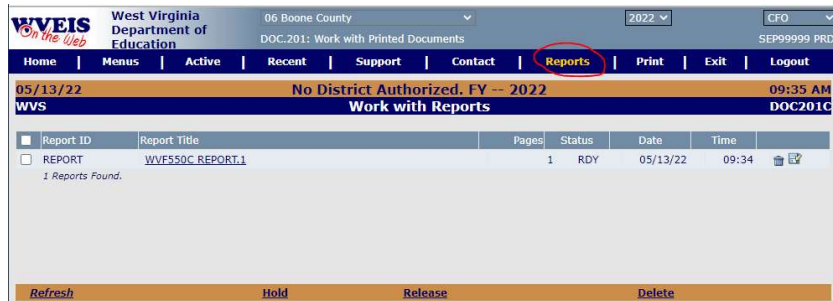
Cancel? N

```

21

## WVEIS Printing (Continued)

- Printer/Output Queue “PRT01” defaults all reports to the WVEIS on the Web (WOW) report printer.



WVEIS On the Web | West Virginia Department of Education | 06 Boone County | 2022 | CFO

DOC.201: Work with Printed Documents | SEP9999 PRD

Home | Menus | Active | Recent | Support | Contact | **Reports** | Print | Exit | Logout

05/13/22 | No District Authorized. FY -- 2022 | 09:35 AM

WVS | Work with Reports | DOC201C

Report ID	Report Title	Pages	Status	Date	Time
<input type="checkbox"/> REPORT	WVFS50C REPORT.1	1	RDY	05/13/22	09:34

1 Reports Found.

Refresh | Hold | Release | Delete

22

## WVEIS Printing (Continued)

- If printing directly to a print session (not PRT01), and the report doesn't print:
  - Access "MYREPORTS" in WVEIS and see if the report is on "Hold."
  - If so, use the "Release" command (option 6) to send the report to the printer
  - If not check your print/output queue to ensure you have your printer session entered correctly (use option 2 to change the print options)

```

Work with All Spooled Files

Type options, press Enter.
1=Send 2=Change 3=Hold 4=Delete 5=Display 6=Release 7=Messages
8=Attributes 9=Work with printing status

Opt File User Device or Queue User Data Sts Total Pages Cur Page Copy
2 REPORT SEP99999 PRT01 WVF550 RDY 1 1
  
```



23

## WVEIS Printing (Continued)

```

Type choices, press Enter.

Spooled file . . . . . > REPORT      Name, *SELECT
Job name . . . . . > WVF550C      Name, *
User . . . . . > SEP99999      Name
Number . . . . . > 685447      000000-999999
Spooled file number . . . . . > 1      1-999999, *ONLY, *LAST, *ANY
Job system name . . . . . > SOUTH      Name, *ONLY, *CURRENT, *ANY
Spooled file created:
Creation date . . . . . > 05132022      Date, *ONLY, *LAST
Creation time . . . . . > 093417      Time, *ONLY, *LAST
Printer . . . . . > *OUTQ      Name, *SAME, *OUTQ
Print sequence . . . . . > *SAME      *SAME, *NEXT
Form type . . . . . > *STD      Form type, *SAME, *STD
Copies . . . . . > 1      1-255, *SAME
Restart printing . . . . . > *STRPAGE      Number, *SAME, *STRPAGE...

F3=Exit F4=Prompt F5=Refresh F10=Additional parameters F12=Cancel
F13=How to use this display F24=More keys
More...
  
```



24

## WVEIS Printing (Continued)

- Hit page down to see “more.”

```

Change Spooled File Attributes (CHGSPLFA)

Type choices, press Enter.

Additional Parameters

Output queue . . . . . RT01      Name, *SAME, *DEV
Library . . . . . QUSRSYS     Name, *LIBL, *CURLIB

F9=Exit  F4=Prompt  F5=Refresh  F10=Additional parameters  F12=Cancel
F13=How to use this display  F24=More keys

```

Bottom

25

## WVEIS Printing (Continued)

- In “Change” mode, you can hit “F10” to show more parameters that can be changed (like printing only specific pages!):

```

Change Spooled File Attributes (CHGSPLFA)

Type choices, press Enter.

Additional Parameters

Output queue . . . . . RT01      Name, *SAME, *DEV
Library . . . . . QUSRSYS     Name, *LIBL, *CURLIB
File separators . . . . . 0          0-9, *SAME
Page range to print:
Starting page . . . . . 1          Number, *SAME, *ENDPAGE
Ending page . . . . . *END        Number, *SAME, *END
File becomes available . . . . . *FILEEND  *SAME, *JOBEND, *FILEEND...
Save file . . . . . *NO          *SAME, *NO, *YES, *IMMED
Expiration date for file . . . . . *NONE     Date, *SAME, *NONE, *DAYS
Days until file expires . . . . . 1-366
Output priority . . . . . 5          1-9, *SAME, *JOB
User data . . . . . 'WVF550'   User data, *SAME
Align page . . . . . *NO          *SAME, *NO, *YES

More...

F9=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```

26

## WVEIS Printing (Continued)

- If printing to “PRT01” output queue, keep in mind that deleting or releasing a report in the WOW Reports menu or in the WVEIS “MYREPORTS” program will delete it in the other location, as well.



27

## WVEIS RED X

- If you are working in WVEIS and see a red X pop up in the bottom left corner, you have likely entered a command that is not recognized by WVEIS.
  - The red X indicates that your screen is essentially locked up and no other commands will be accepted by the system.
  - You must use the “reset” key to clear the error and unlock the program.
  - “Reset” on my keyboard is the left “ctrl” key, but that may be different for you depending on your keyboard mapping. Access your keyboard preferences (covered earlier) to find the key that is set up as “reset”



28

Questions?

Thank you!

[sepauley@k12.wv.us](mailto:sepauley@k12.wv.us)

304-558-6300, Ext. 1



West Virginia DEPARTMENT OF  
**EDUCATION**

29