



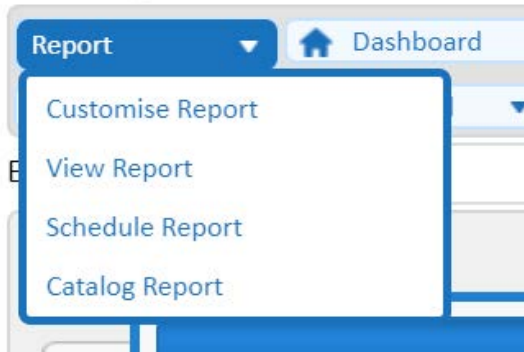
eTurns

Reports

[Help documentation](#)



Contents



The TrackStock reporting module has many powerful features. In **View Report** the user can create any of the standard reports in the list, which also includes any **customized** reports created for the room. In **Customized Reports** the user can take any base report and tailor it to his/her needs. In **Schedule Reports** the user can choose to receive a report on a recurring schedule or upon the occurrence of an event. Finally, the **Catalog Report** provides the ability for the user to print a “book” of items in the room with bar codes and any other item attributes of the user’s choosing.

Report Module

a. View Report:

To open **View Report**, hover your cursor over the **Report** white button in the upper left corner of the screen. Then click **View Report**.

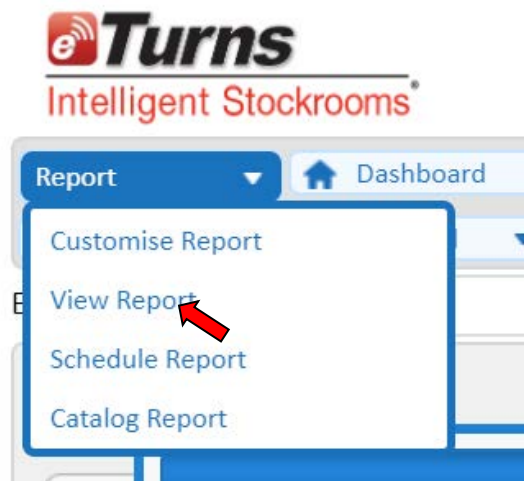


Figure 1

The following page appears:

Enterprise ▼ Company {

ViewReports

List of Reports:

- Assets
- Audit Trail
- AuditTrail Transaction
- Company
- Cumulative Pull
- Discrepancy Report
- eVMI Poll History
- eVMI Usage
- eVMI Usage Manual Count
- eVMI Usage No Header
- Expiring Items
- InStock
- InStock Margin
- Instock with QOH
- Inventory Count
- Item Received
- Items
- Kit
- ND report Requisition
- Order
- Order Cutom
- order enterprise
- Orders With Lineltems
- Project Spend
- Pull
- pull all data
- Pull Completed
- Pull Incomplete
- Pull No Header
- Pull Summary
- Pull Summary By Consigned PO

Figure 2

b. To create an Instock Report:

Click on "InStock" in the list. The following page displays:

ViewReports

List of Reports:

- 001 A Test Req
- Assets
- AT Test
- ATT_SerialLot
- Audit Trail
- AuditTrail Transaction
- Company
- Cost ctr room report
- Cumulative Pull
- Discrepancy Report
- eVMI Poll History
- eVMI Usage
- eVMI Usage Manual Count
- eVMI Usage No Header
- Expiring Items
- InStock**
- InStock Margin
- Instock with QOH
- Instock-Margin
- Inventory Count
- Item Received
- Items
- Jon's Sales Order
- Kit
- ND report Requisition
- Order
- Order Cutom
- order enterprise
- Order ext cost
- Orders With Lineltems
- Project Speed

Company: Company 1 selected

Selected Company: Rock Company1

Room: Room 1 selected

Selected Room: Cost Checkup

Filter QOH: Select QOH Filter

Selected QOH Filters: ☐ Only Expiration Items

Range: Item #

InStockByBin

- 5000
- 5100
- 5355
- 5455
- 5505
- 5555
- 5605
- 5655
- 5705
- 5755
- 5805
- 5855
- 5905
- 5955
- Item april 2017
- Item Lot

First Sort Field: Item # asc

Second Sort Field: Bin asc

Figure 3

Pick an additional Company (optional)

Company: Company 1 selected

Selected Company: Rock Company1

Room: Room 1 selected

Selected Room: Cost Checkup

Filter QOH: Select QOH Filter

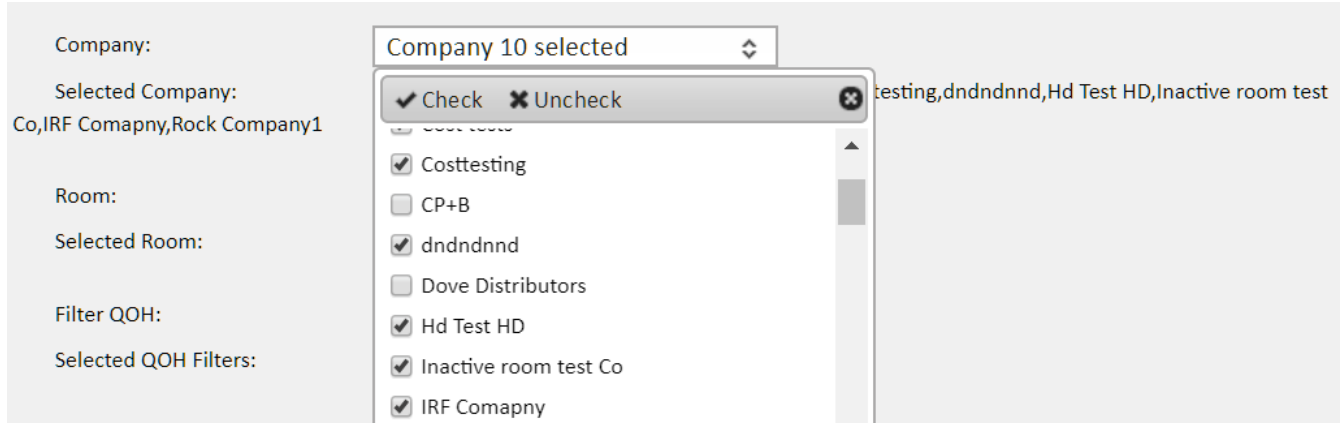
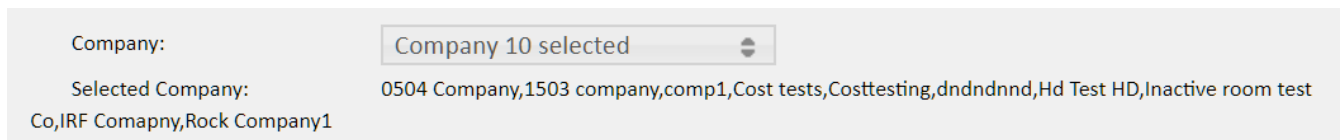
Selected QOH Filters: ☐ Only Expiration Items

Range: Item #

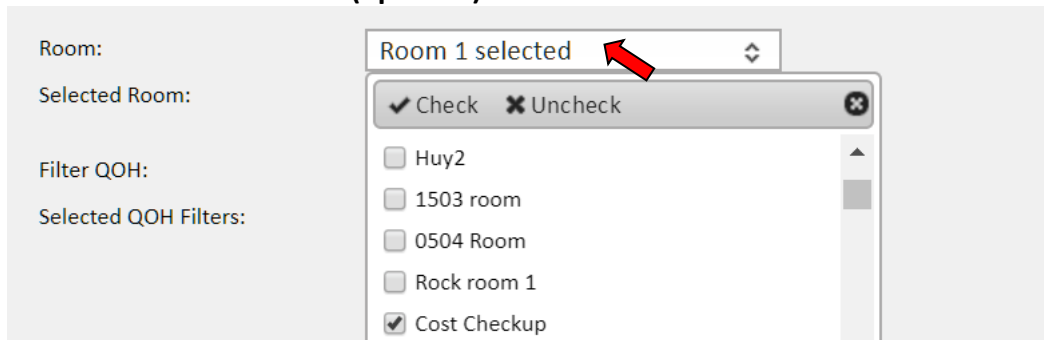
☒ Check ☒ Uncheck

- ☐ new tes troooooom
- ☐ Nick Demo
- ☐ Niraj Company _NDND
- ☒ Rock Company1
- ☐ Smart Electric
- ☐ Super comany
- ☐ test 24 april deploy
- ☐ test april end
- ☐ test bv company admin

The list of companies to which the user has access will display. The company that is currently in the Company dropdown is checked by default. If the user wants to include data from any of these other companies, the user should check the box in front of that company. As Companies are checked, they are listed behind the dropdown. Closing the Company dropdown will display the selected 10 Companies:

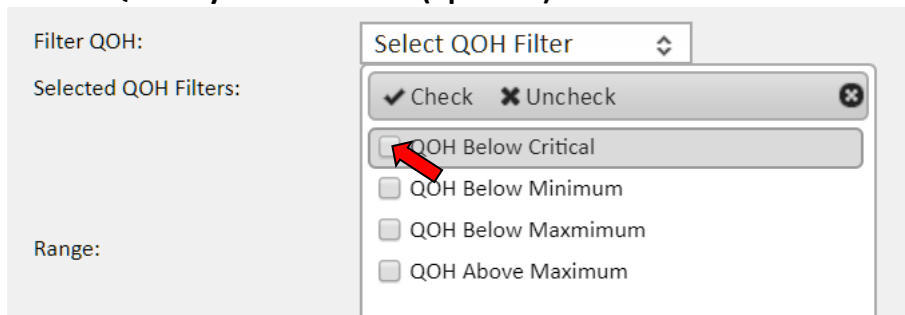



Pick an additional Room (optional)



Selecting additional rooms will add their data to the report. The default selection for room is the room in the dropdown at the top of the page: Cost Checkup, in this case.

Pick a Quantity on Hand filter (optional)



The InStock report allows the user to also filter by the “stock status” of the items. Any of these statuses can be checked to create the view the user wishes for the report.

Filter QOH: QOH Filter 1 selected

Selected QOH Filters: QOH Below Critical

Check the “Only Expiration Item” if the user only wants items with Expiration dates (optional)

Selected QOH Filters: QOH Below Critical

☐ Only Expiration Items

Range Dropdown: pick a Column that exists in the report to then pick to filter the report (optional)

Selected QOH Filters: QOH Below Critical

☐ Only Expiration Items

Range: Bin

InStockByBin

Item #

Supplier

Supplier #

Category

Bin

Manufacturer

Manufacturer #

UNSPSC

ItemBlanketPO

ItemUDF1

ItemUDF2

ItemUDF3

ItemUDF4

ItemUDF5

Inv Class

asc

asc

asc

asc

asc

Page

View Report

Send Report

Range: Bin

InStockByBin

A1

A2

A3

Cost Bin

Loc1

If the user selects one of the bins (locations) in this list (A3), then the report will display only those items that use bin A3 and will not include any other items in the InStock report. If the user selects nothing in the list, then the InStock report will display all items in these bins.

Pick fields to sort the data on in the report along with ascending/descending sequence (optional)

First Sort Field:	Item # ▼	asc ▼
Second Sort Field:	Bin ▼	asc ▼
Third Sort Field:	▼	asc ▼
Fourth Sort Field:	▼	asc ▼
Fifth Sort Field:	▼	asc ▼

Check “Hide Report Header” if user wishes to save the report to Excel and does not want any merged fields in the report, so sorting and analysis is easier (optional)

FIFTH SORT FIELD: ▼ asc ▼

☐ Hide Report Header

☐ Show Signature On Last Page

Check “Show Signature On Last Page” if user needs a signature line at the bottom of the report to prove receipt of the information by an individual (optional)

☐ Hide Report Header

☐ Show Signature On Last Page

Click “View Report” to create the report. Click “Send Report” to email report.

☐ Show Signature On Last Page

View Report

Send Report

3) Additional selections in Reports:

From / To transaction dates. Use the calendar picker:

Selected Room: Cost Checkup

Start Date:

End Date:

Status

Order

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Pick any combination of Order Status:

Status

Order

Status 7 selected

☒ Check
 ☒ Uncheck

- ☒ UnSubmitted
- ☒ Submitted
- ☒ Approved
- ☒ Transmitted
- ☒ Incomplete
- ☒ Past Due
- ☒ Incomplete Past Due
- ☐ Closed

Pick either Consigned or Customer owned Pull quantities:

Quantity Type:

Consume_Pull

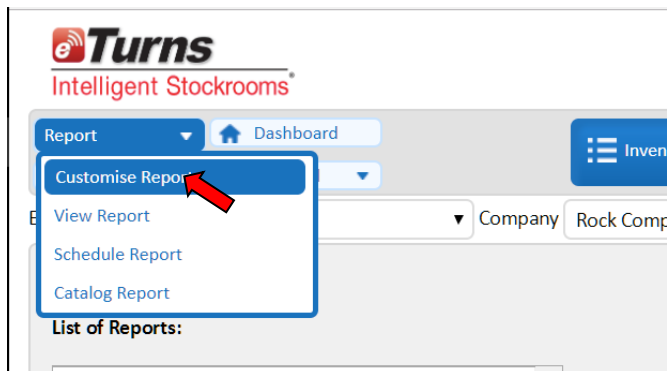
Quantity Type 2 selected

☒ Check
 ☒ Uncheck

- ☒ Customer Owned Quantity
- ☒ Consigned Quantity

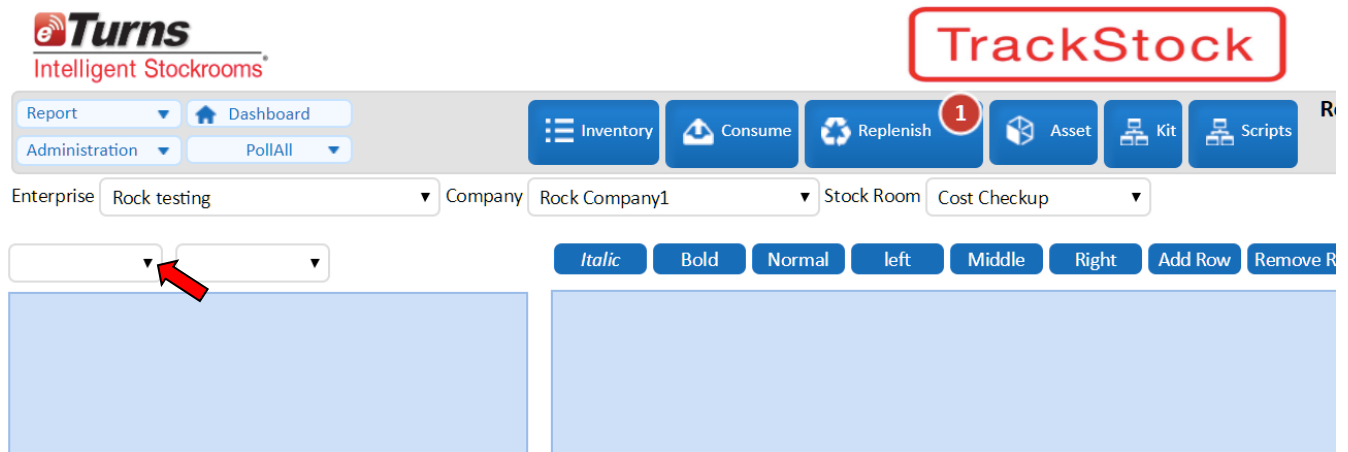


Customize Reports

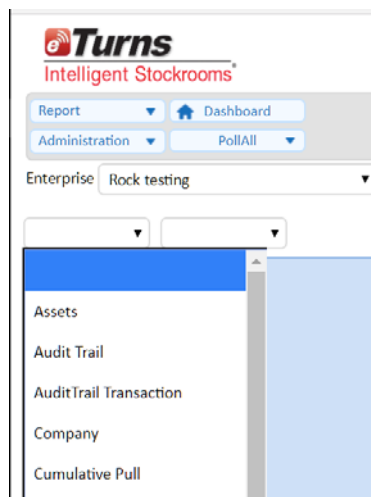




Initial Display after clicking Customize Report:



After clicking left dropdown, the list of default reports displays. Click InStock:



Left column are fields that can be dragged and dropped to the right to add to the InStock report. New fields always are added to the far right side of the list of columns.

The fields across the top to the right are the default InStock report columns. If the user wants to remove a column, just click the trash can to the right of the column name. Deleted columns are added back to the list of available columns at the bottom of the list on the left.

0.81in	0.76in	0.49in	0.49in	0.46in	0.52in	0.65in	1.17in
Category	Updated By	Min	Max	Cost UOM	Sugg. Order Qty	On Hand Qty	On Requisition Qty

The user can drag and drop any column to any place in the sequence of columns. The

user can drag and drop the column dividers to change width of columns.

Any column name can be clicked once and then any of the font changes just below the room dropdowns can be clicked, like *italics* for example.

Company Stock Room

Italic **Bold** **Normal** **left** **Middle** **Right**

0.96in	0.74in	0.60in	0.81in	0.79in	
Item #	Bin	UOM	Supplier	Supplier #	D

Sort on up to 5 columns in the report, ascending or descending:

First Sort Field: ☒ Include

asc ☒ Include

Second Sort Field: ☒ Include

asc ☒ Include

Third Sort Field: ☒ Include

asc ☒ Include

Fourth Sort Field: ☒ Include

Totals, subtotals, and grand totals can be turned on or off:

☒ Include Total

☒ Include Sub Total

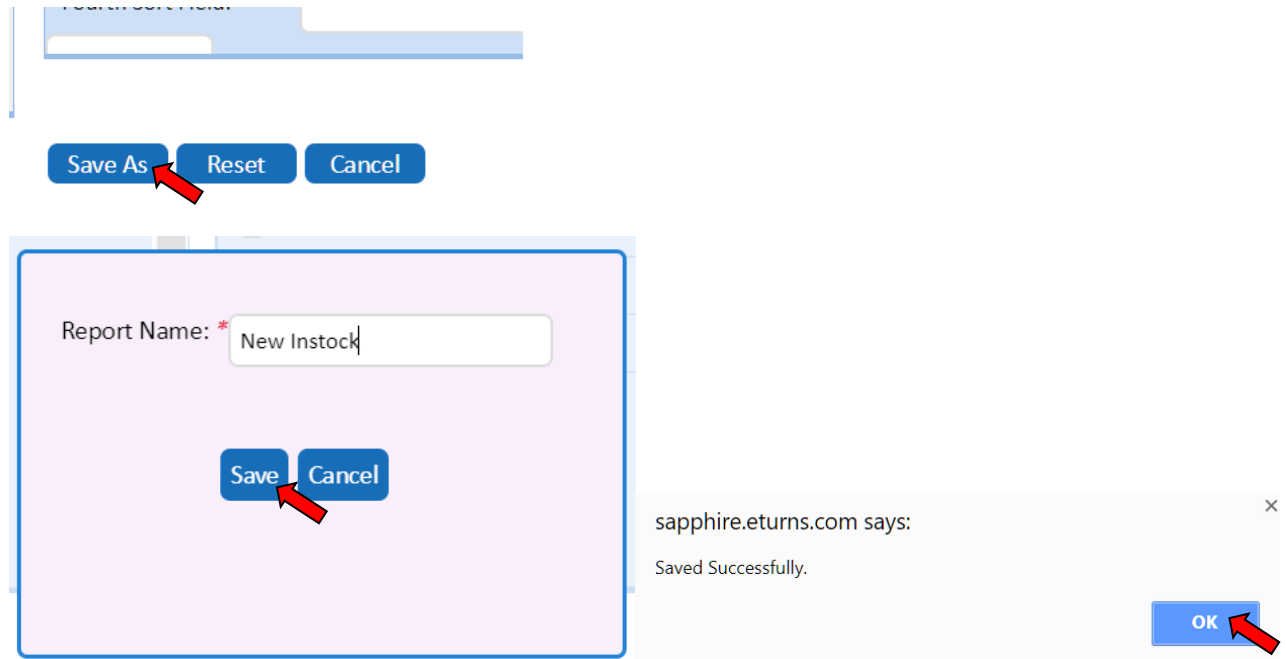
☒ Include Grand Total

Each report can be created so that only the creating user can see it in his/her list of reports, or can be made public across the entire Enterprise:

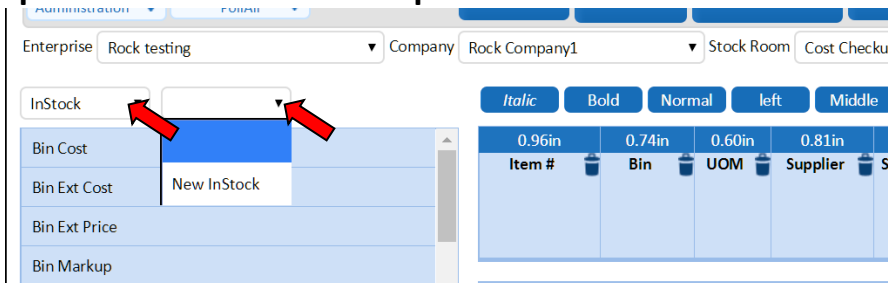
Make as Private ☒

Make as Enterprise Report ☐

When done with customizing the report, click on Save as. Then enter a name and click Save.

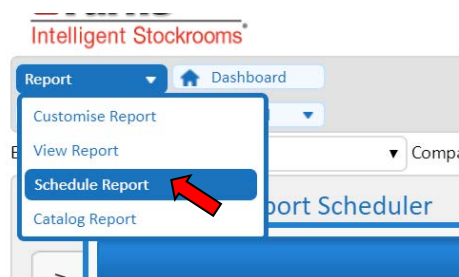


Close page and reopen Customize reports, then click in the left dropdown "InStock". Then, click the dropdown to the right of the InStock. Select the "New InStock" to open the "New InStock" report to edit it further.



Schedule Reports:

Mouse over the Report button, then click on Schedule Report in the submenu.



Click on Order to Supplier report in the list on the left:

enterprise

Rock testing

Company

Rock Company1

Stock room

Cost Checkup

Alert and Report Scheduler

New

List

ItemStockOut

Jon's Sales Order

Kit

MaintenanceDue

ND report Requisition

New InStock

Order

Order Cutom

order enterprise

Order ext cost

OrderApproval

OrderApproveReject

Orders With LinelItems

OrderToSupplier

PendingOrders

Schedule Name

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings

Immediate

Hourly

Daily

Weekly

Monthly

Is Active

Suppliers

Suppliers Message

Agriform

Cost Supplier

Supplier ABC

Schedule Name

Schedule Name

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings ☒ Immediate ☐ Hourly ☐ Daily ☐ Weekly ☐ Monthly

Note: Immediate is the only correct choice for Order to Supplier.



Hourly means, for example, every 3 hours @ 10 minutes after the hour:

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings	<input type="radio"/> Immediate <input checked="" type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly
	Every <input type="text" value="3"/> Hours at Every <input type="text" value="10"/> Minutes ,

Daily means, for example, every other day @ 5:30pm. (Or every week day):

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings	<input type="radio"/> Immediate <input type="radio"/> Hourly <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly
	<input checked="" type="radio"/> Every <input type="text" value="2"/> Days
	<input type="radio"/> Every Week Days
ScheduleRunTime	<input type="text" value="17:20"/>
Next Run Date	
Is Active	
Suppliers	
Suppliers Message	

Choose Time

Time

Hour

Minute

Now Done

Weekly means, for example, on Tuesday and Friday @ 5:20 pm:

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings	<input type="radio"/> Immediate <input type="radio"/> Hourly <input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly
	Recurring every <input type="text" value="0"/> Weeks On
	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday
	<input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday
	<input type="checkbox"/> Sunday
ScheduleRunTime	<input type="text" value="17:20"/>

Monthly means, for example, the 2nd Monday of Every 4th month @ 5:20pm:

AlertsSchedule Schedule Details

Auto AlertsSchedule Settings	<input type="radio"/> Immediate <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input checked="" type="radio"/> Monthly
	<input type="radio"/> Days <input type="text" value=""/> of Every <input type="text" value=""/> Months
	<input checked="" type="radio"/> The <input type="text" value="Second"/> of Every <input type="text" value="2"/> Months
	<input type="text" value="Monday"/> of Every <input type="text" value="2"/> Months
ScheduleRunTime	<input type="text" value="17:20"/>



VERY IMPORTANT: the user must check the “Is Active” checkbox or the report will never send:

Is Active



In the Supplier list, select the supplier whose order you want to get sent in this alert.

Suppliers

Suppliers Message

Agriform

Cost Supplier

Supplier ABC



Under the Supplier list, check the box of the type of attachment you want sent: PDF or Excel file format.

Then pick the Report you want sent in that format:

AttachmentTypes

☒ PDF ☒ Excel

AttachmentReportIDs

Order



The “Send empty email” option is to get a blank email sent to you at the scheduled day and time, even though there is no data to send. This is called a “heartbeat” to make sure the system is operational, but there is just no data. In this Order to Supplier example, though, there is no reason to check this box as this report only gets sent if there is an order to Supplier ABC.

Send Empty Email



Show signature should be checked if you want a signature line at the bottom of the report.

Show Signature



Sort fields in ascending or descending sequence:

SortFieldFirstValue

Item #

asc

SortFieldSecondValue



asc

SortFieldThirdValue



asc

SortFieldFourthValue



asc

SortFieldFifthValue



asc



Email addresses should be entered here separated by commas:

EmailAddress

Multiple emails should be separated by a comma(,).

Culture code, if you want to change, and email subject:

Culture Code

Email Subject

Body of email can be changed to say what the user wishes. Tokens can be added to provide variable information in the body of the email. Click on the Token dropdown to select the token you wish to add to the body of the email, then place it where needed in the text:

EmailTemplateToken Add Token

Dear user:

A new order has been sent to you. The following is the detail of the order:

Order Number: @@ORDERNO@@

Save

Click Save:

Alert and Report Scheduler							
Search <input type="text"/>							
Show 50 Records < 1 >							
Narrow Search By:							
Notification type							
Schedules							
Reports							
Copy	Schedule ID	Schedule Name	Template Name	Report Name	Next Run Date	Is Active	Email Address
	107	Orders to Supplier ABC	OrderToSupplier			Yes	a@b.om

Catalog:

Catalogs

No Of Items Per Page *

2010 - 1-4/5" x 4"

Name *

Barcode catalog

Blanket PO

BOM Item

Build Break

Category

Company

Company Logo

Consignment

Cost

Created By

Created On

Critical Qty

Datecode Track

Default Bin

Default Pull Qty

Default Reorder Qty

Desc.

Enforce Reorder Qty

Enterprise Logo

GL A/C

Inv. Classification

Is Item Level Min Max

IsPurchase

IsTransfer

Item Image

Item Type

Item#

Lead Time In Days

Link1

Link2

Long Desc

Lot Track

Manufacturer

Manufacturer#

Markup

Max Qty

Min Qty

Room

Sell Price

Serial Track

Supplier

Supplier Logo

Supplier#

Taxable

Trend

Trending Setting

UDF1

UDF2

UDF3

UDF4

UDF5

Unit

UNSPSC

UPC

Weight Per Piece

Row++ Col++ Barcode++ QR++ Row-- Col-- Barcode-- QR--

4in

Item#

Desc.

Min Qty

Max Qty

TrackStock

Note: Double click to select/deselect cell.

Reset

Merge Cell

Split H

Split V

Bold

Italic

Font Size++

Font Size--

10pt

Left

Center

Right

Justify