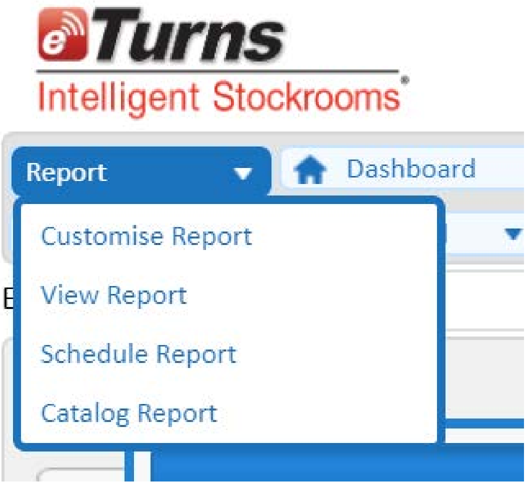
eTurns

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**.

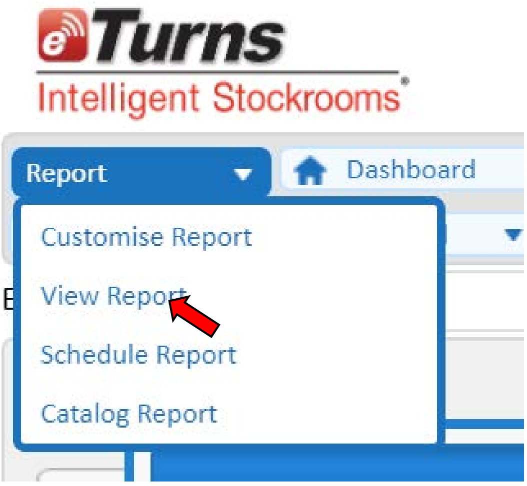


Figure 1

The following page appears:

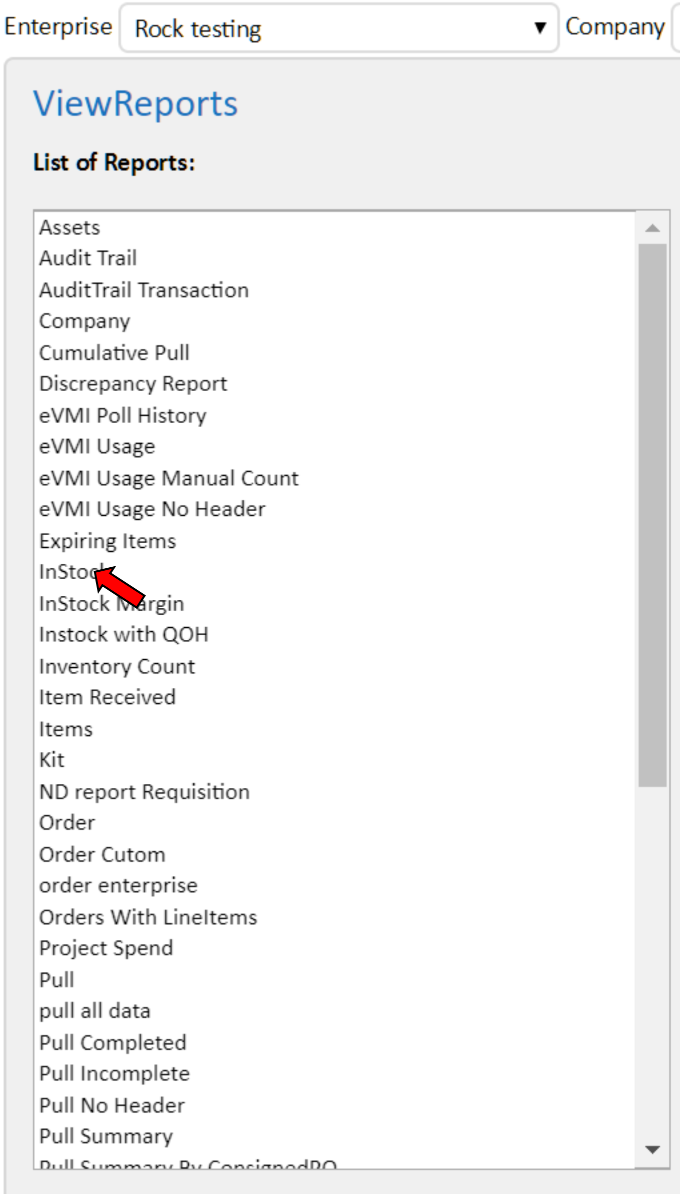


Figure 2

b. To create an Instock Report:

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

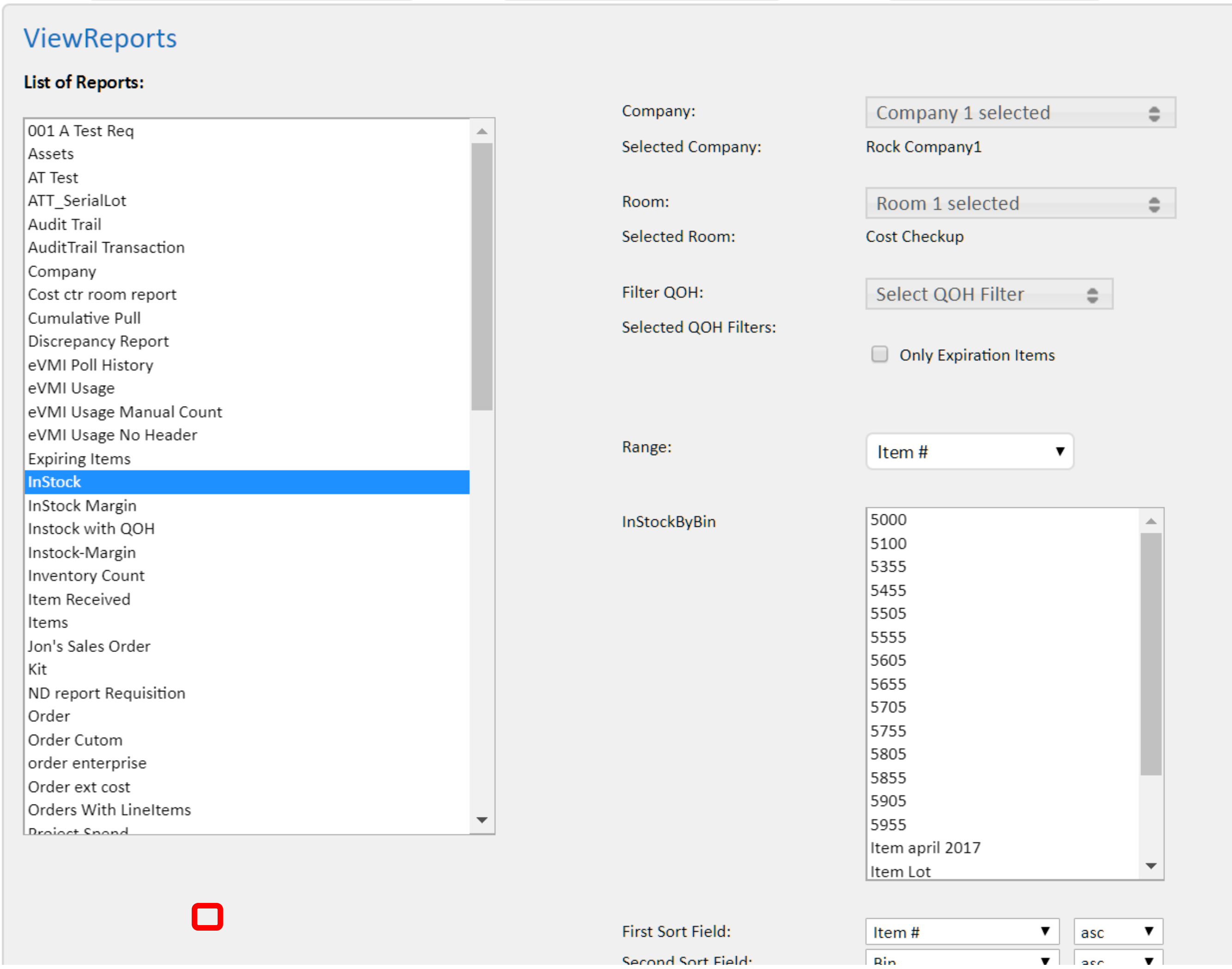
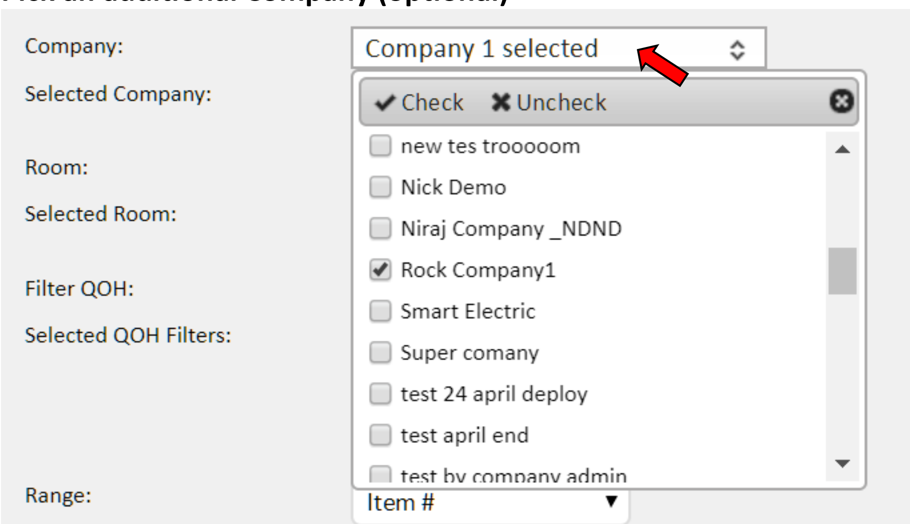
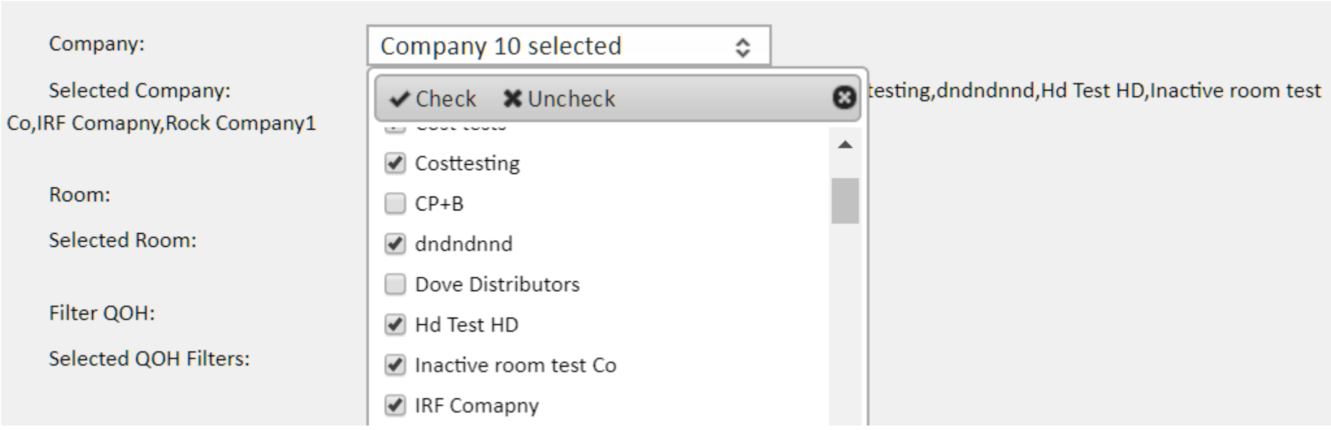


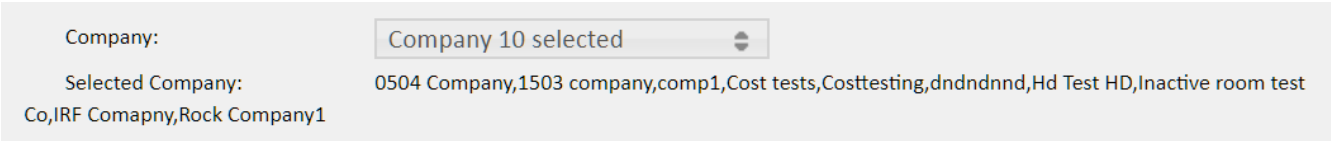
Figure 3

Pick an additional Company (optional)

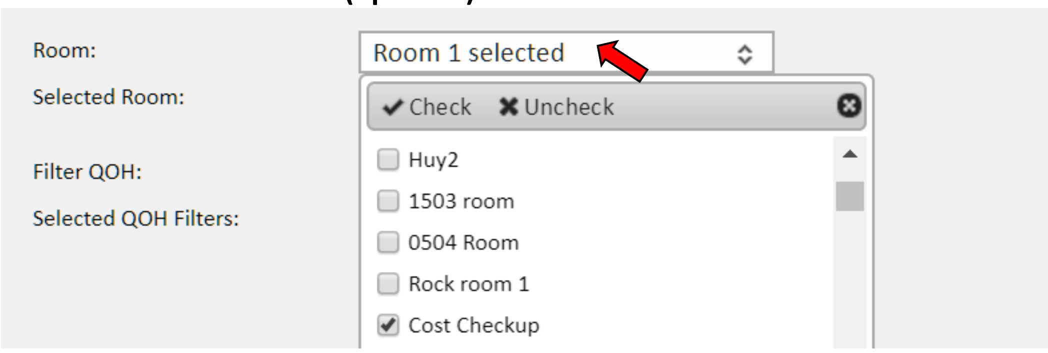


The list of companies to which the user has access will display. The company that is currently in the Company dropdown is checked by default. If the user wants to include data from any of these other companies, the user should check the box in front of that company. As Companies are checked, they are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



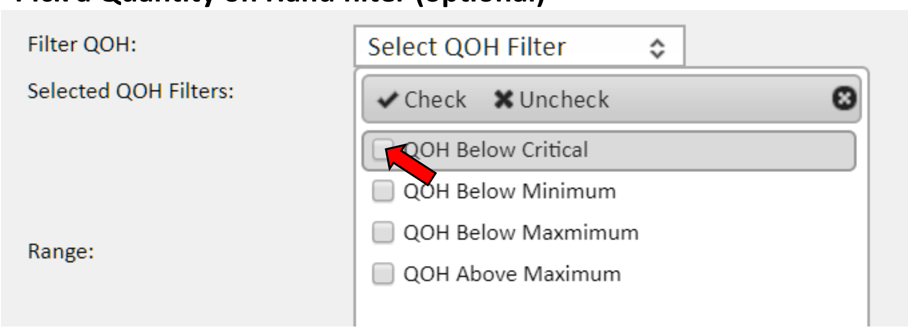


Pick an additional Room (optional)

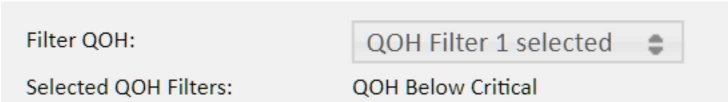


Selecting additional rooms will add their data to the report. The default selection for room is the room in the dropdown at the top of the page: Cost Checkup, in this case.

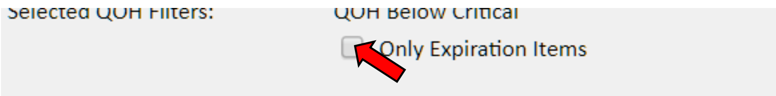
Pick a Quantity on Hand filter (optional)



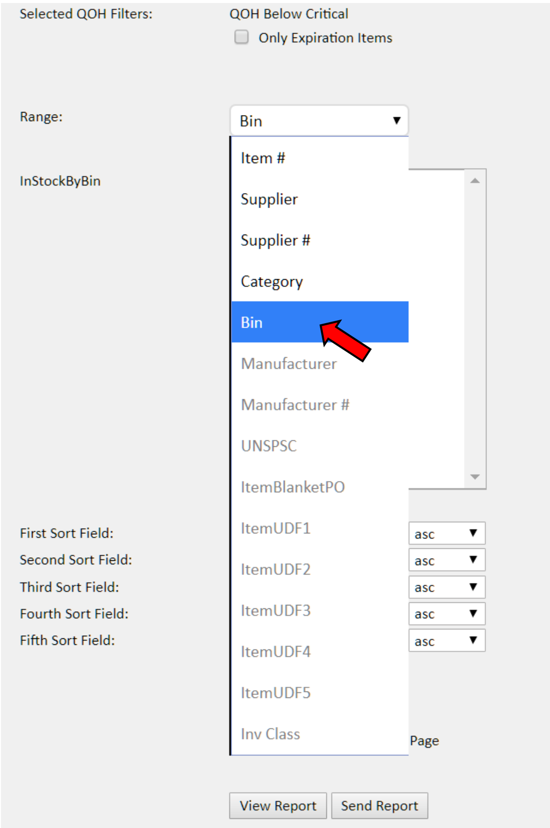
The InStock report allows the user to also filter by the “stock status” of the items. Any of these statuses can be checked to create the view the user wishes for the report.

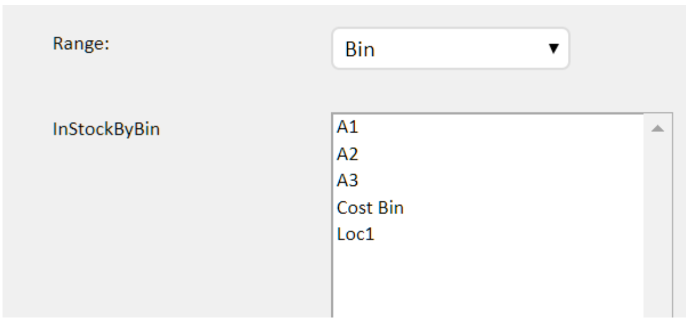


Check the “Only Expiration Item” if the user only wants items with Expiration dates (optional)



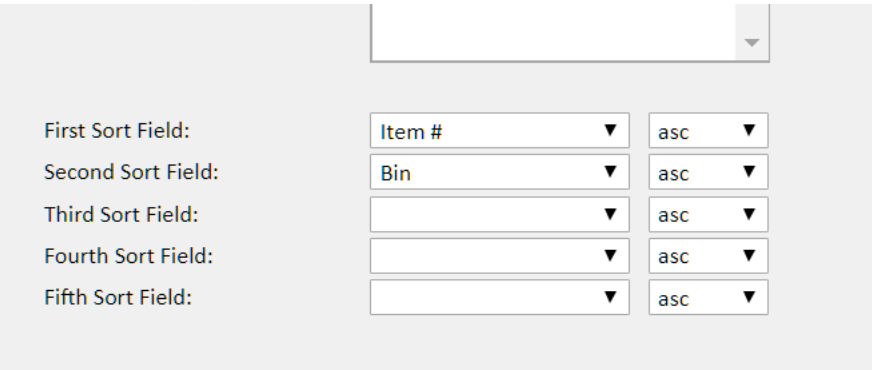
Range Dropdown: pick a Column that exists in the report to then pick to filter the report (optional)



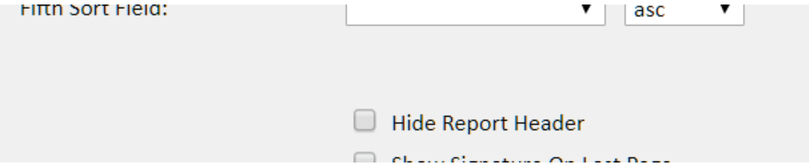


If the user selects one of the bins (locations) in this list (A3), then the report will display only those items that use bin A3 and will not include any other items in the InStock report. If the user selects nothing in the list, then the InStock report will display all items in these bins.

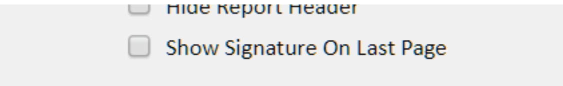
Pick fields to sort the data on in the report along with ascending/descending sequence (optional)



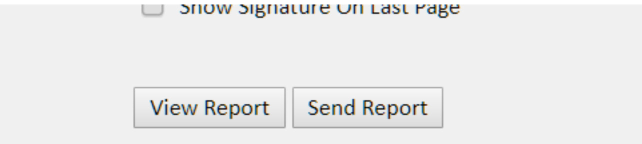
Check "Hide Report Header" if user wishes to save the report to Excel and does not want any merged fields in the report, so sorting and analysis is easier (optional)



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)

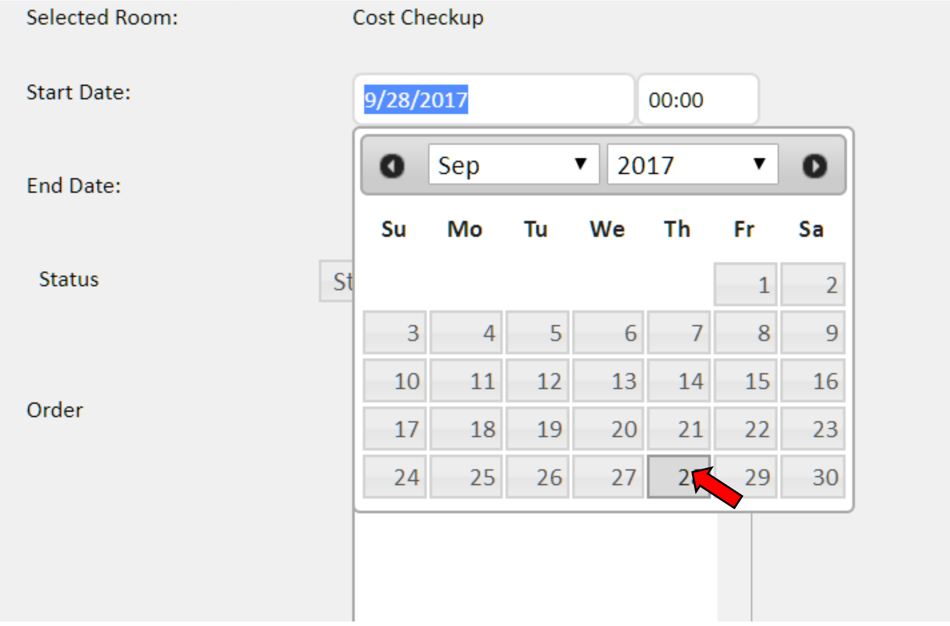


Click "View Report" to create the report. Click "Send Report" to email report.

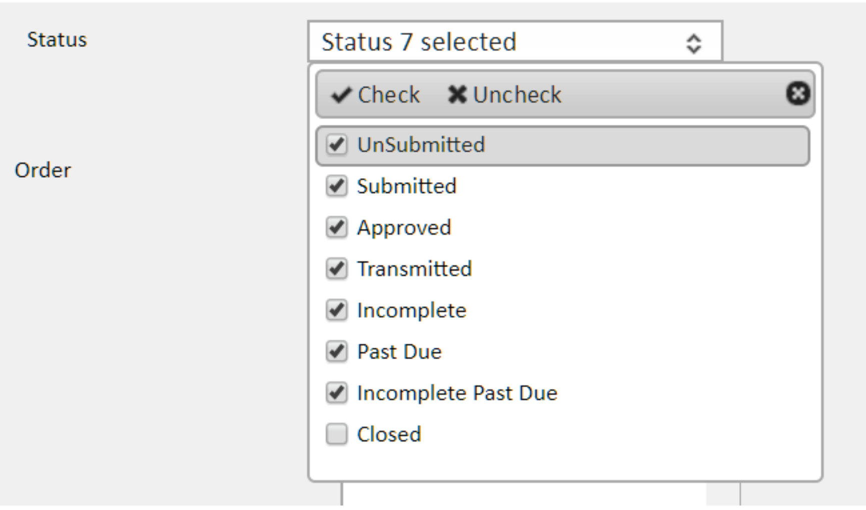


3) Additional selections in Reports:

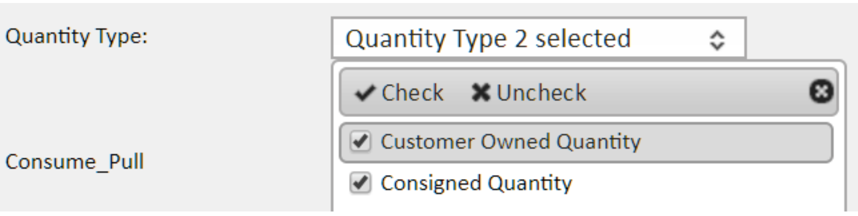
From / To transaction dates. Use the calendar picker:



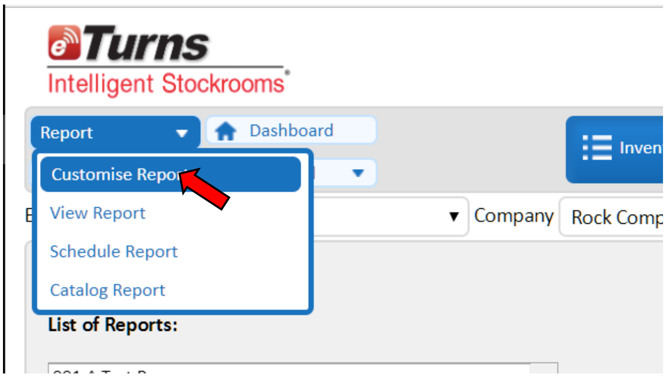
Pick any combination of Order Status:



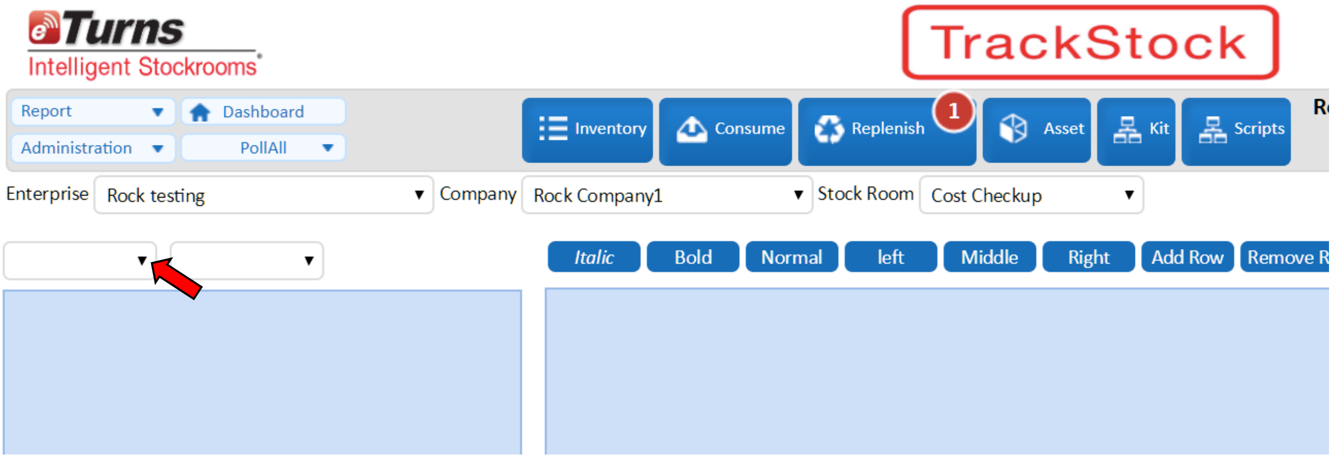
Pick either Consigned or Customer owned Pull quantities:



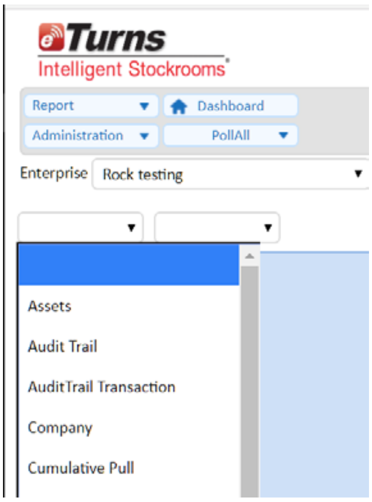
Customize Reports



Initial Display after clicking Customize Report:

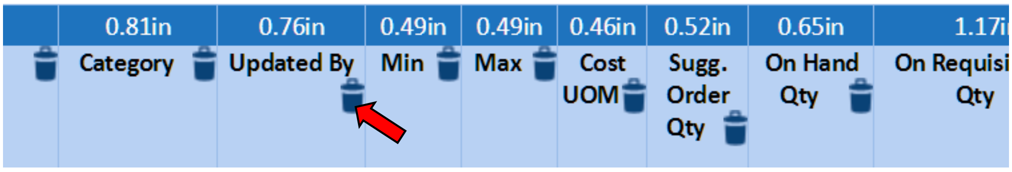


After clicking left dropdown, the list of default reports displays. Click InStock:



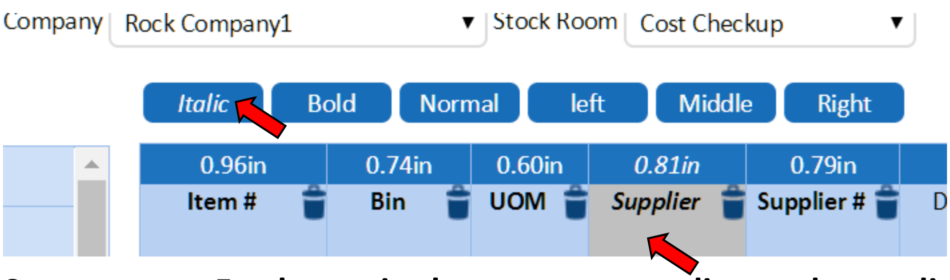
Left column are fields that can be dragged and dropped to the right to add to the InStock report. New fields always are added to the far right side of the list of columns.

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.



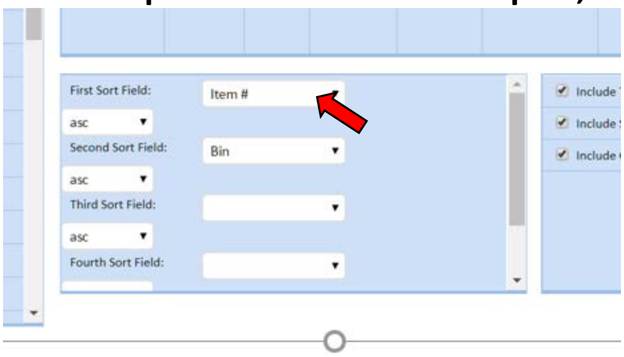
The user can drag and drop any column to any place in the sequence of columns. The user can drag and drop the column dividers to change width of columns.

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.

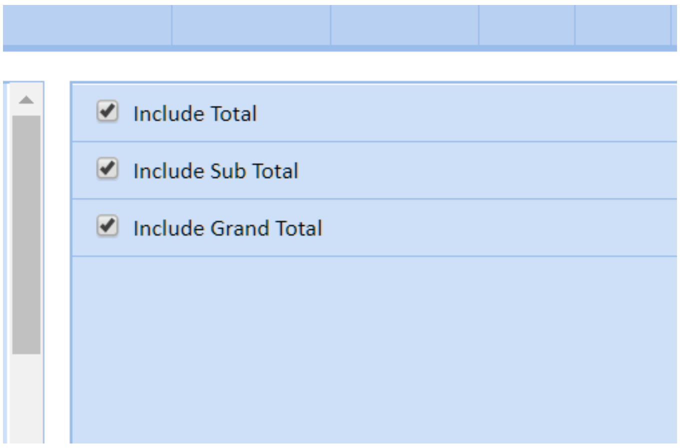


:

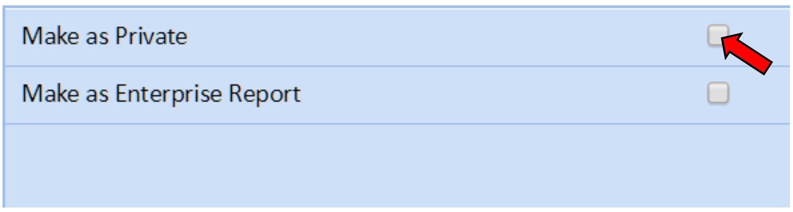
Sort on up to 5 columns in the report, ascending or descending:



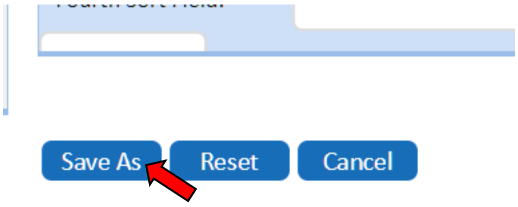
Totals, subtotals, and grand totals can be turned on or off:

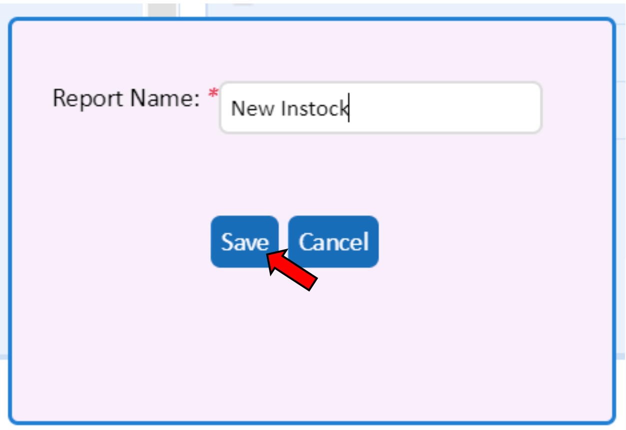


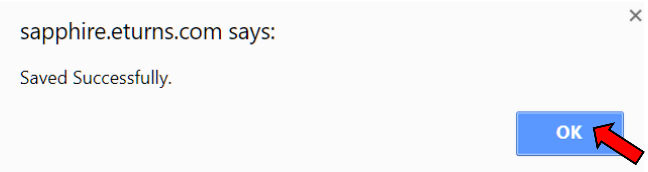
Each report can be created so that only the creating user can see it in his/her list of reports, or can be made public across the entire Enterprise:



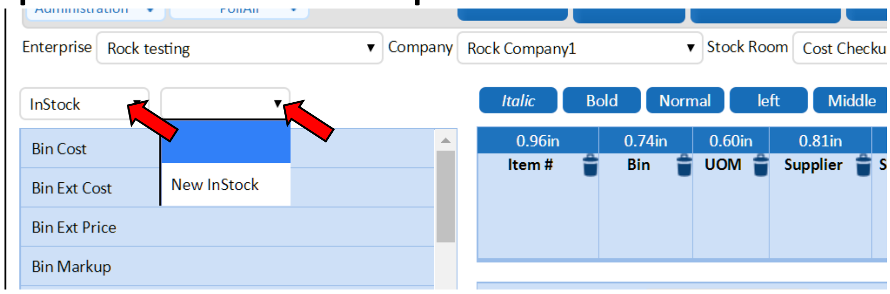
When done with customizing the report, click on Save as. Then enter a name and click Save.





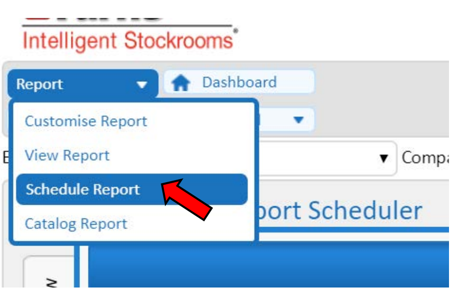


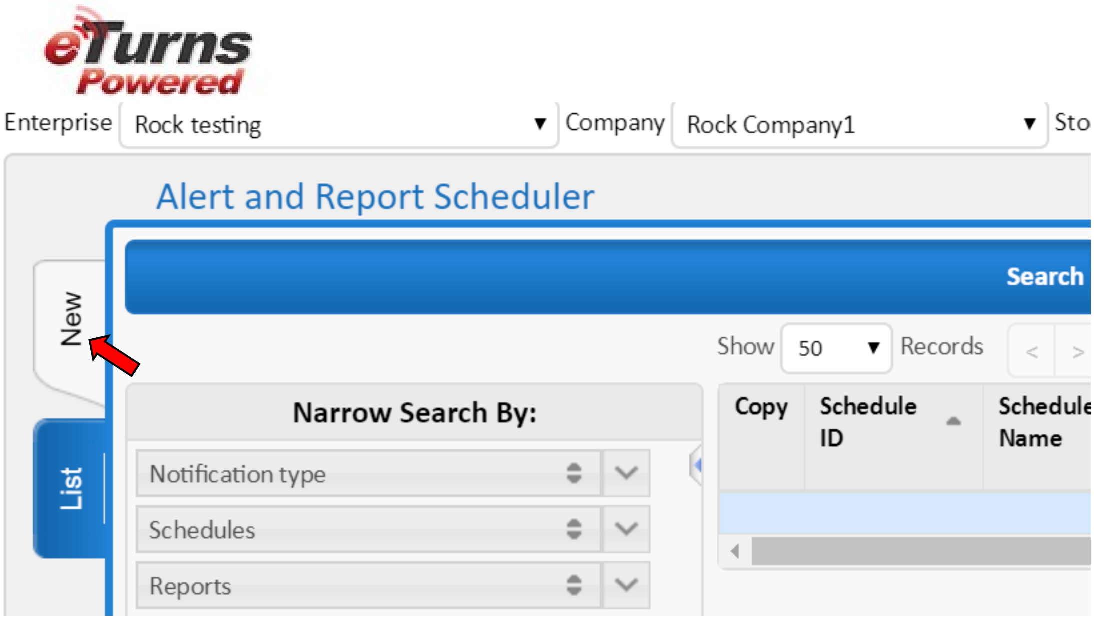
Close page and reopen Customize reports, then click in the left dropdown "InStock". Then, click the dropdown to the right of the InStock. Select the "New InStock" to open the "New InStock" report to edit it further.



Schedule Reports:

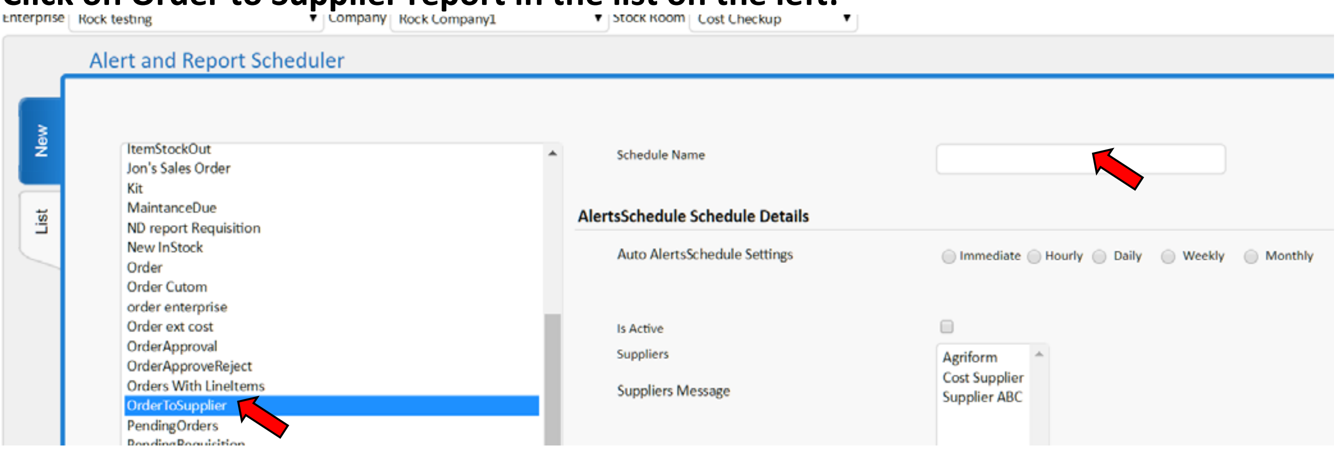
Mouse over the Report button, then click on Schedule Report in the submenu.



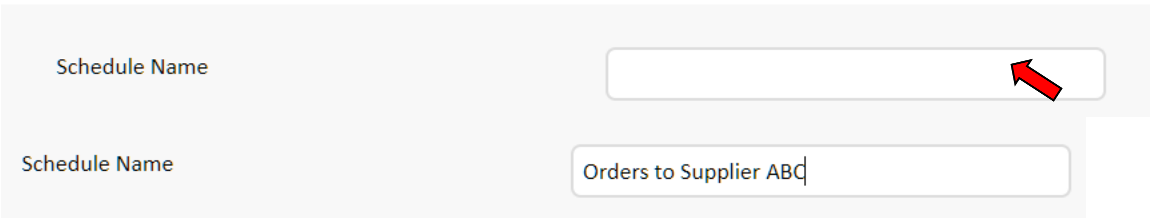


Click on the New button on the left of the grid to create a new schedule.

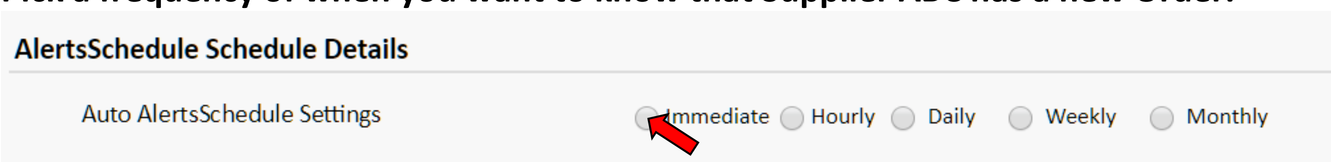
Click on Order to Supplier report in the list on the left:



Enter a name for the new Schedule:

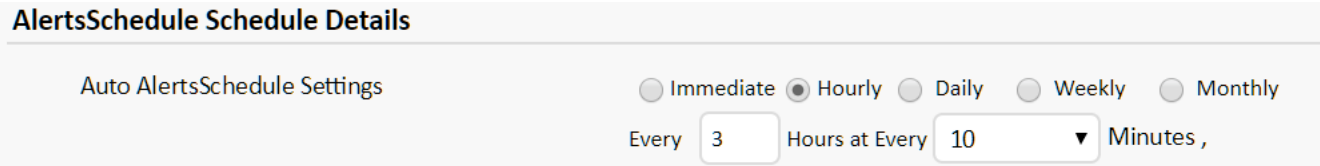


Pick a frequency of when you want to know that Supplier ABC has a new Order.

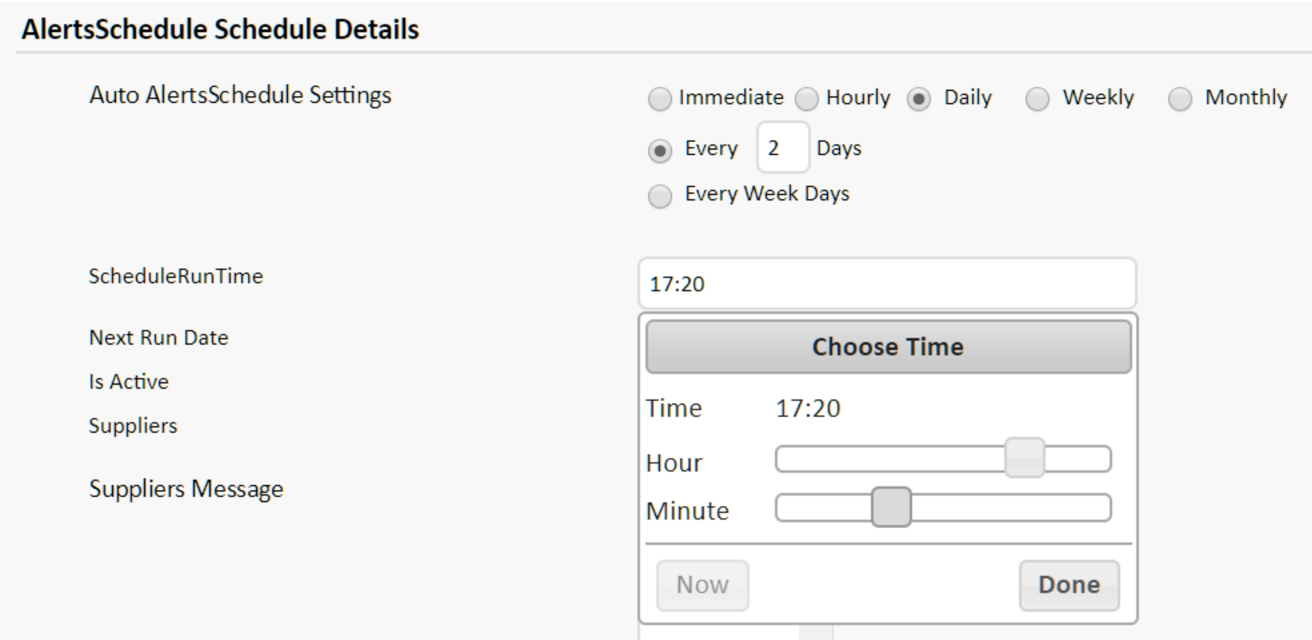


Immediate means as soon as an Order is saved in an "Approved" state.
Note: Immediate is the only correct choice for Order to Supplier.

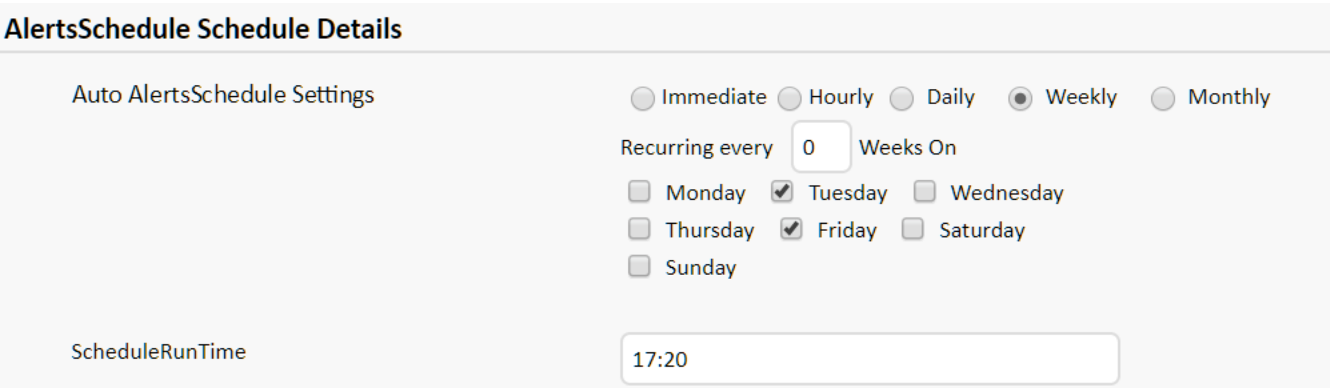
Hourly means, for example, every 3 hours @ 10 minutes after the hour:



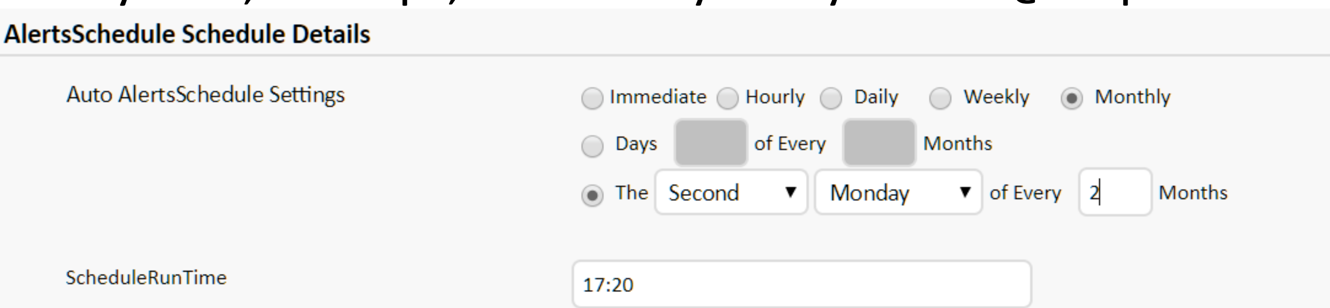
Daily means, for example, every other day @ 5:30pm. (Or every week day):



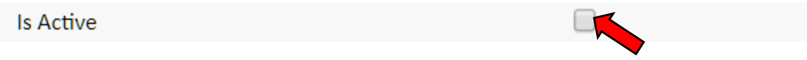
Weekly means, for example, on Tuesday and Friday @ 5:20 pm:



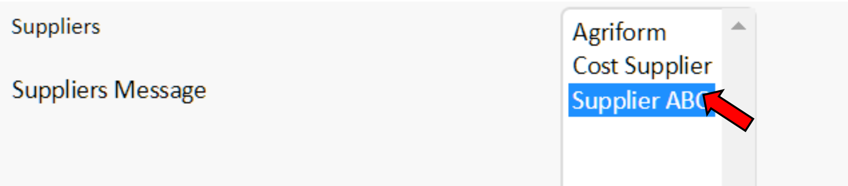
Monthly means, for example, the 2nd Monday of Every 4th month @ 5:20pm:



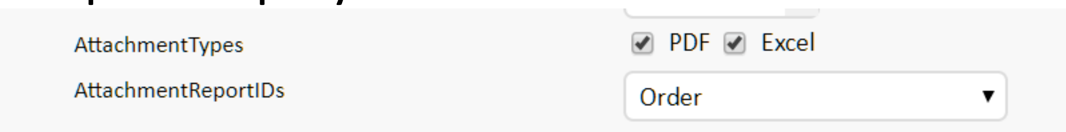
VERY IMPORTANT: the user must check the "Is Active" checkbox or the report will never send:



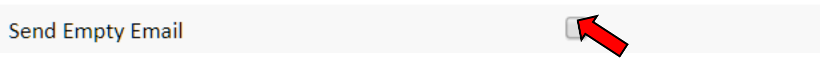
In the Supplier list, select the supplier whose order you want to get sent in this alert.



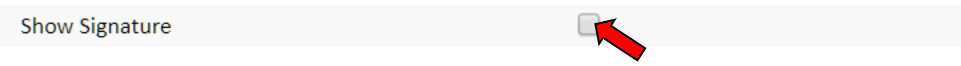
Under the Supplier list, check the box of the type of attachment you want sent: PDF or Excel file format.
Then pick the Report you want sent in that format:



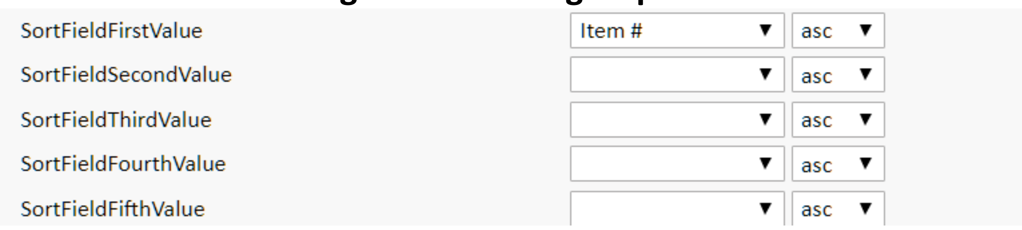
The "Send empty email" option is to get a blank email sent to you at the scheduled day and time, even though there is no data to send. This is called a "heartbeat" to make sure the system is operational, but there is just no data. In this Order to Supplier example, though, there is no reason to check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



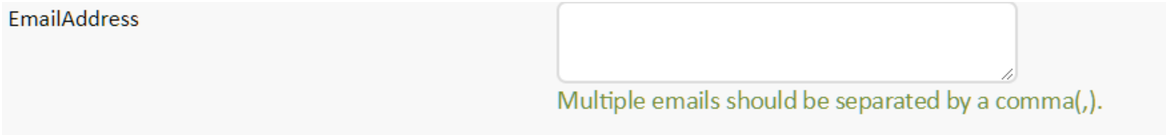
Show signature should be checked if you want a signature line at the bottom of the report.



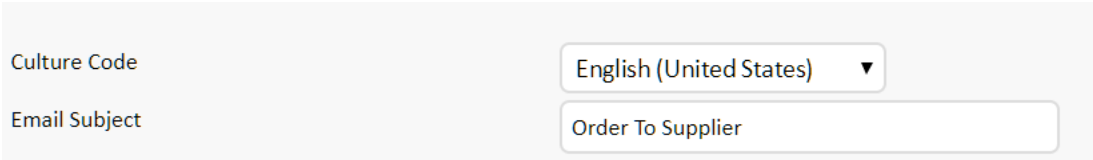
Sort fields in ascending or descending sequence:



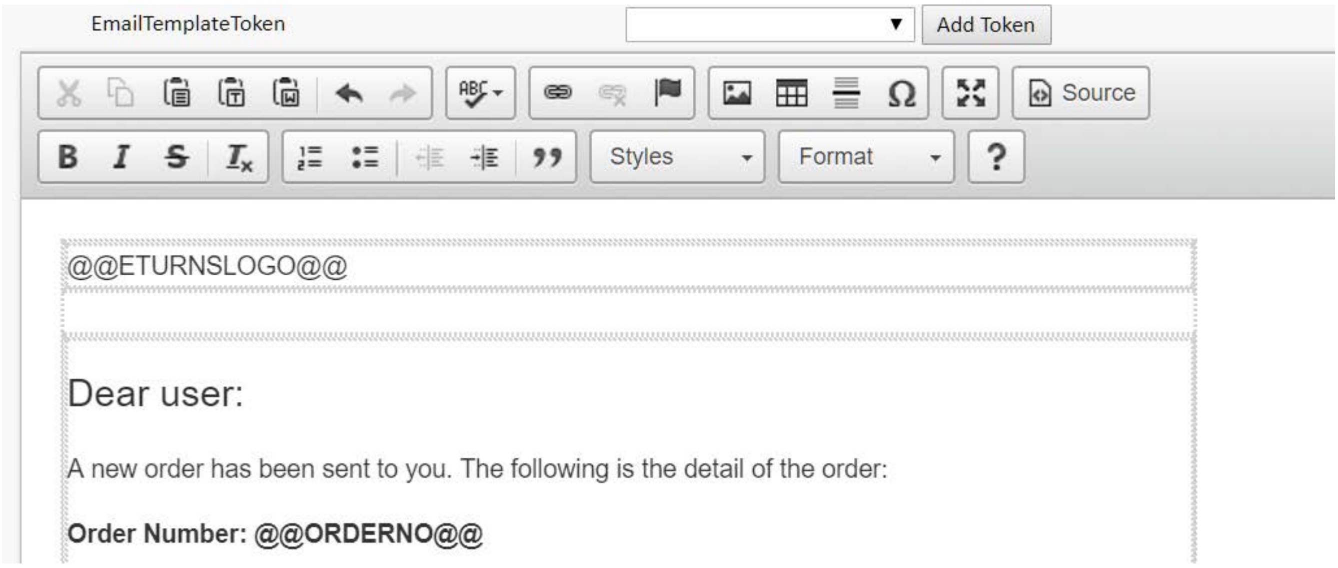
Email addresses should be entered here separated by commas:

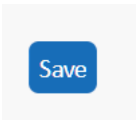


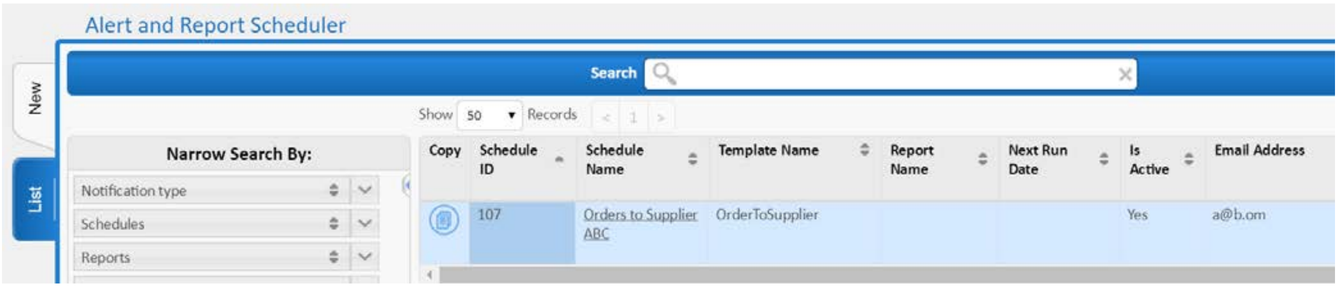
Culture code, if you want to change, and email subject:



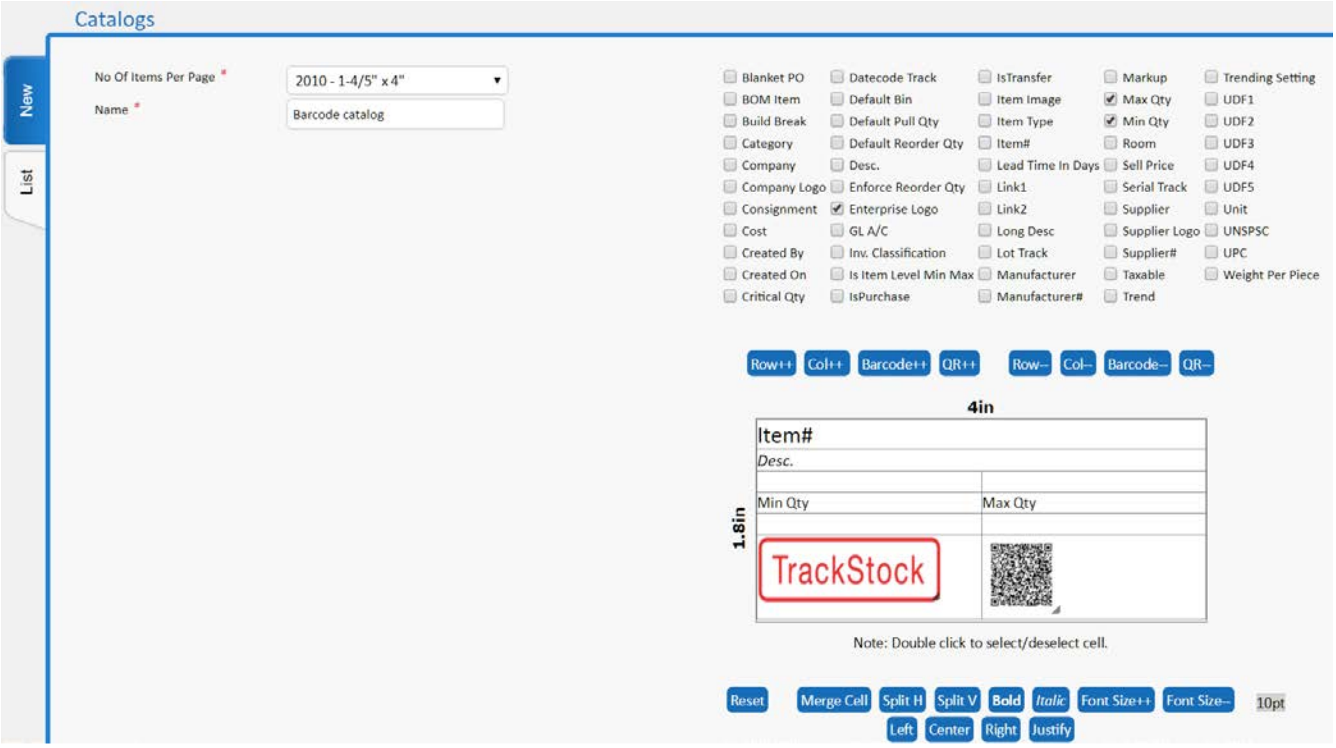
Body of email can be changed to say what the user wishes. Tokens can be added to provide variable information in the body of the email. Click on the Token dropdown to select the token you wish to add to the body of the email, then place it where needed in the text:



Click Save: 



Catalog:



Catalogs
New
List
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
1.8in
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