

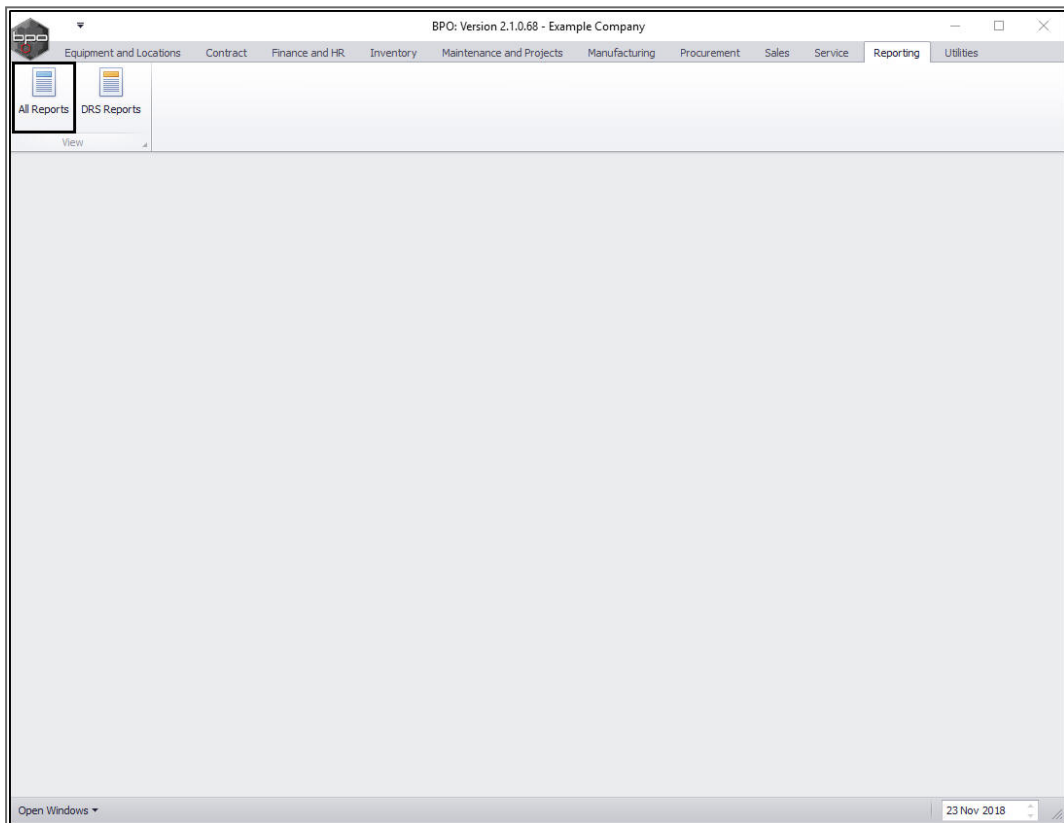
REPORTING

ALL REPORTS - VIEW REPORTS

These reports are structured in a **data grid** format only.

These reports can be exported to **MS Excel** or as **Adobe PDFs**.

Ribbon Access: *Reporting > All Reports*



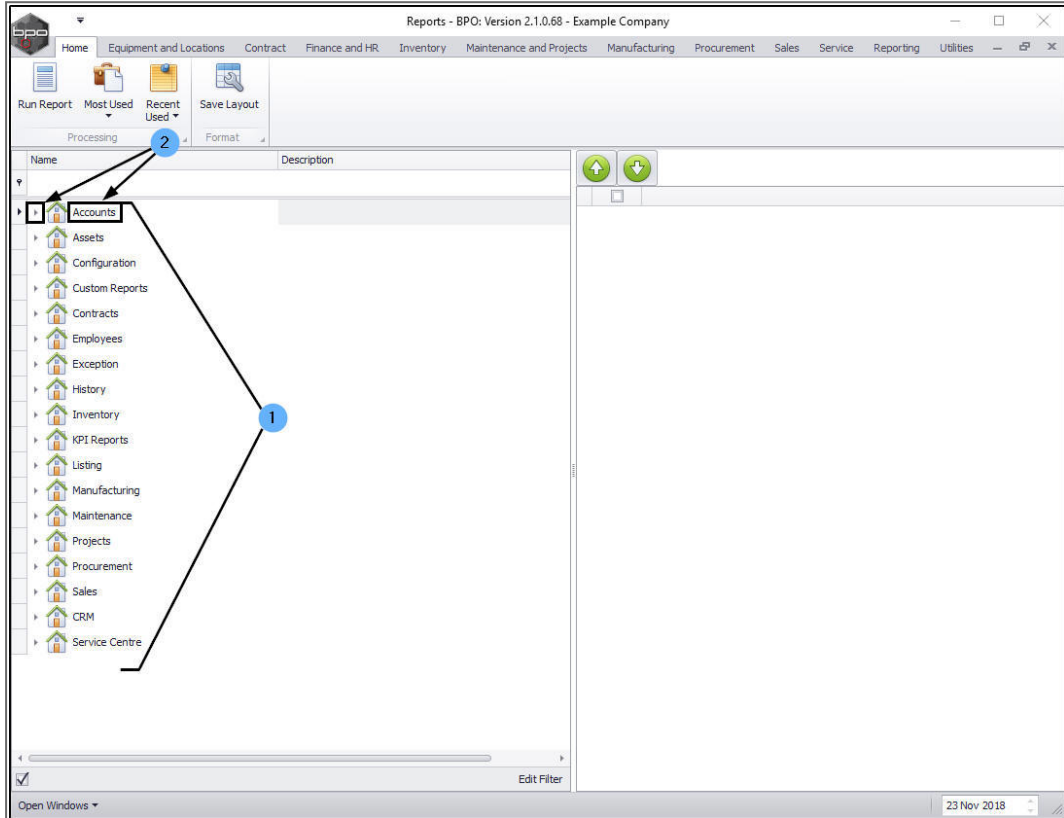
VIEW MAIN REPORT CATEGORIES

The **Reports** listing screen will be displayed.

1. The reports are divided into 18 **main** report categories.

VIEW SUB-REPORT CATEGORIES

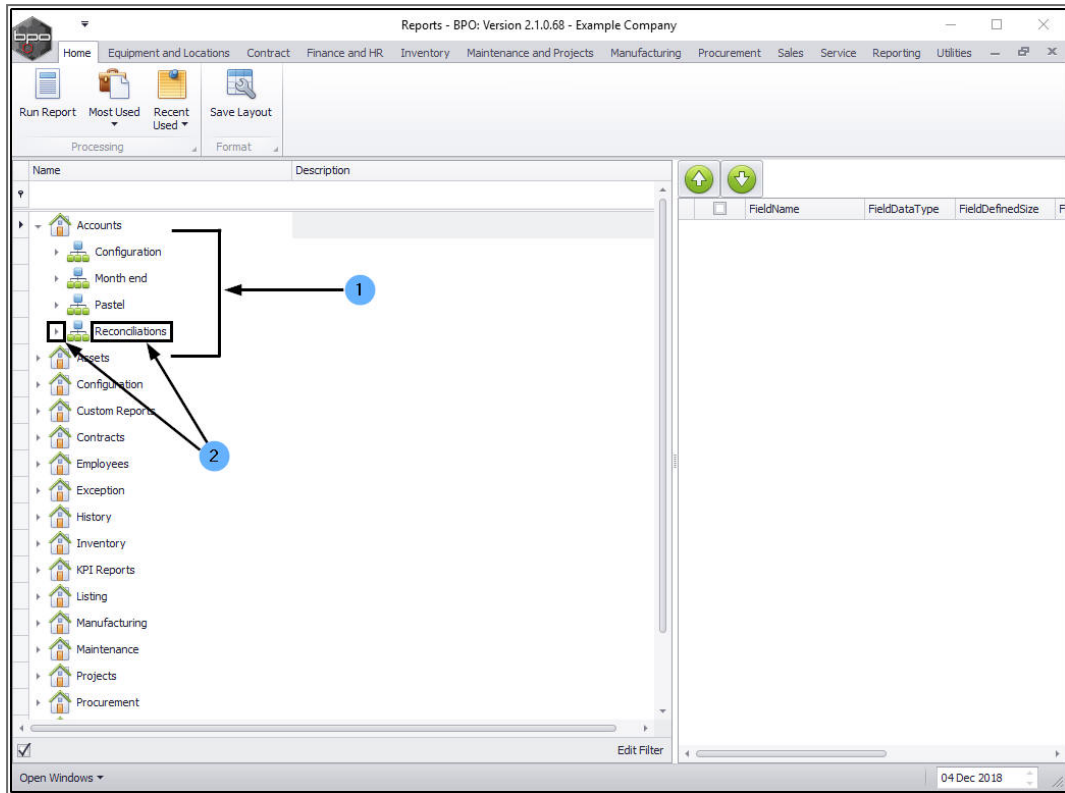
2. A tree view node in front of a category indicates that it is divided into *sub*-categories. Click on this node or double click on the name of the main category.



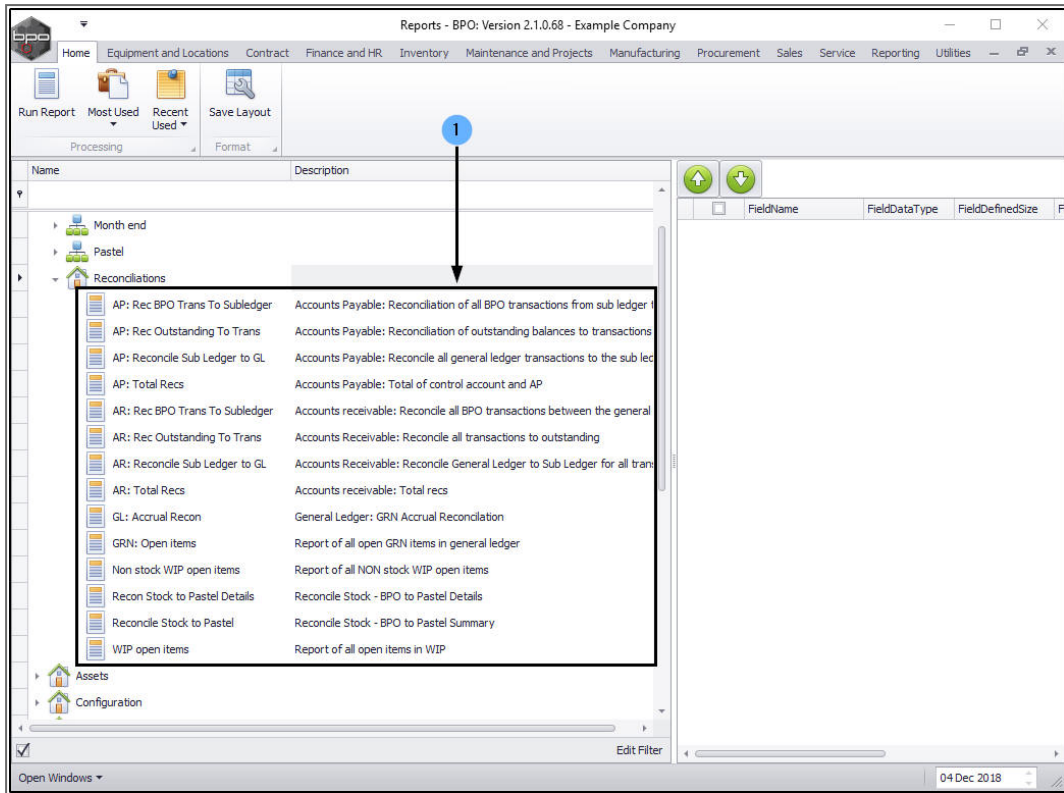
1. The *sub*-categories for the selected main category will be displayed.

VIEW REPORTS

2. Each sub-category that has a tree view node, contains reports. To access these reports, either click on the tree view node or double click on the sub category name.



- A list of all the reports in that sub category will be displayed.

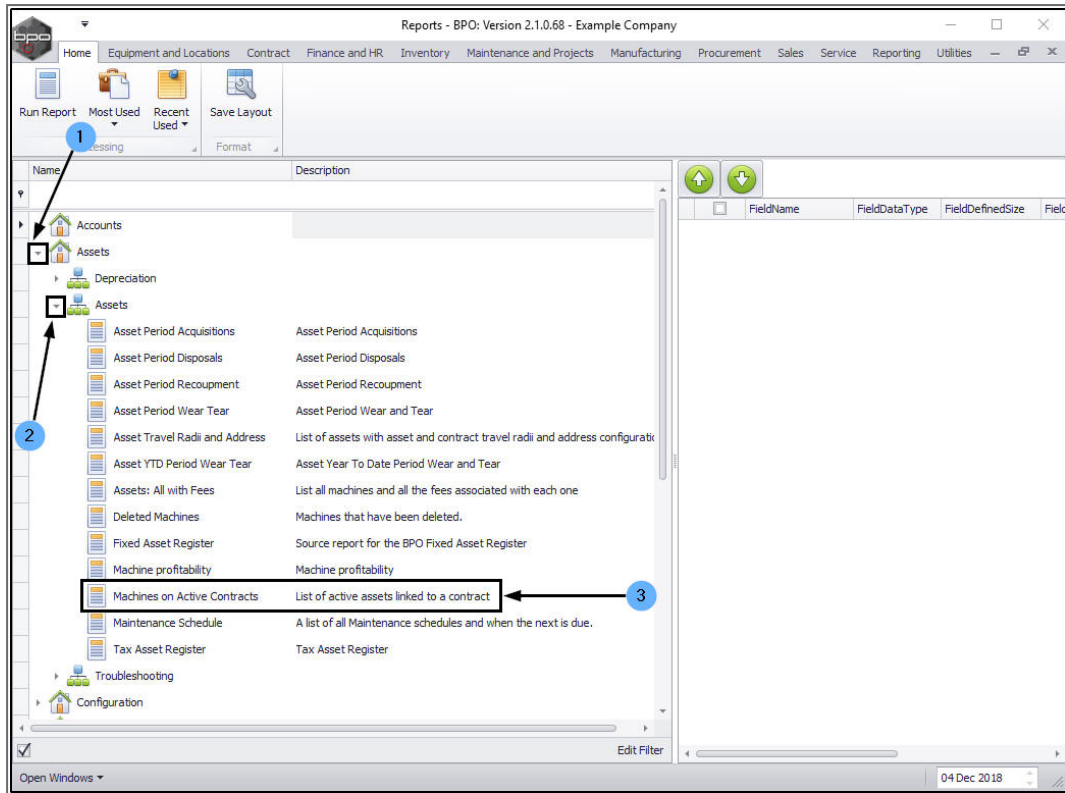


CUSTOMISE A REPORT

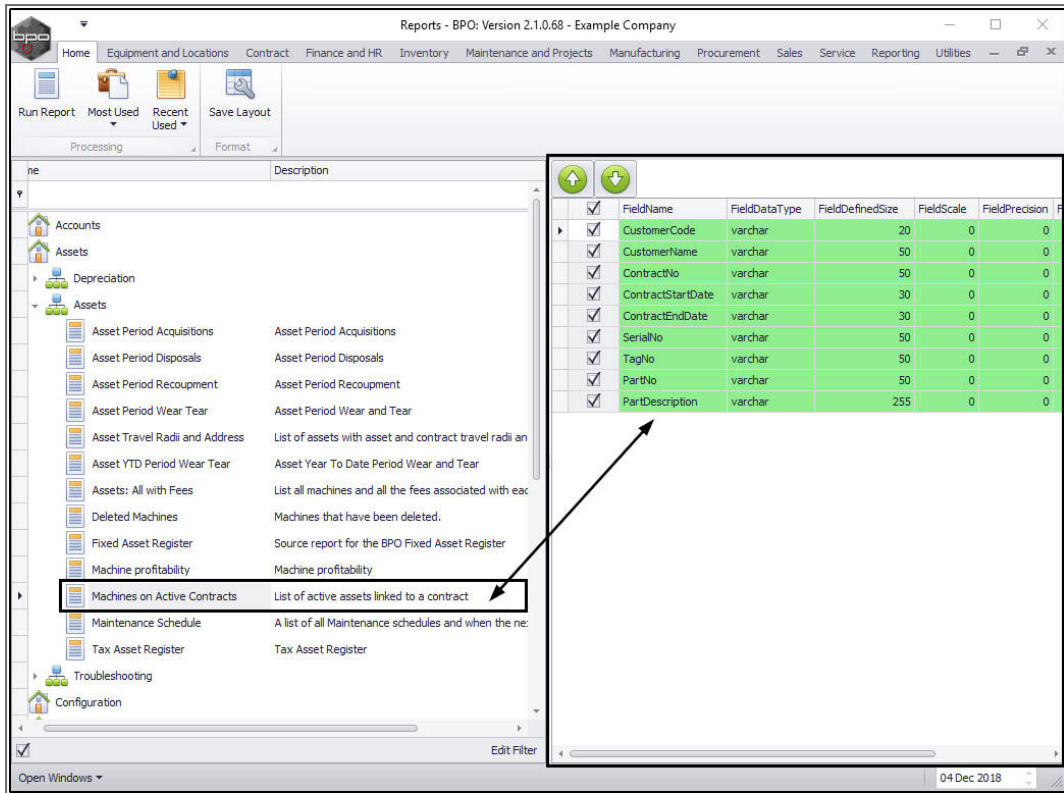
Select the report that you wish to customise:

1. Click on the tree view node in front of the **main** report category.
2. Click on the tree view node in front of the **sub** report category.
3. **Single click** on the report you wish to customise.

Note: Single clicking on the report allows you to make **customisations** to the layout of the report before you run it.



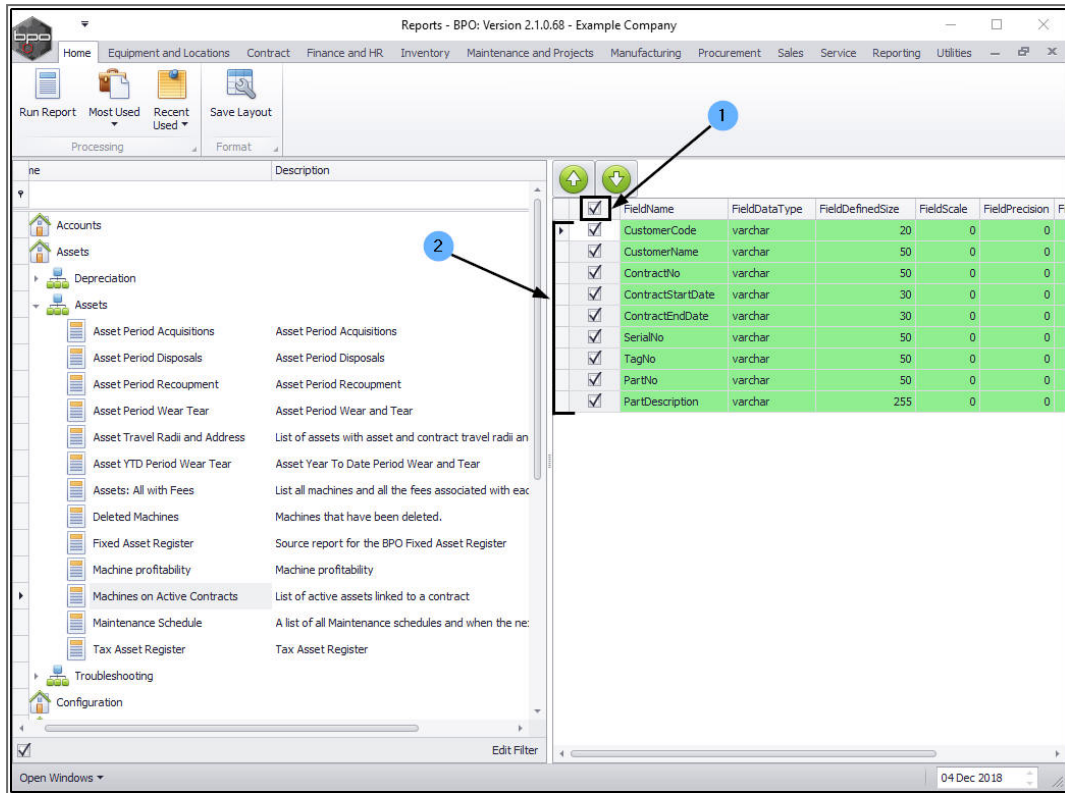
- As you single click on the selected report, the frame on the right side of the screen will populate with the fields or columns available within that report.



SELECT ALL FIELDS/COLUMNS

- Click on the **check box** in the **column header** row.
- All the fields / columns check boxes will be ticked and all of these will be displayed on the report.

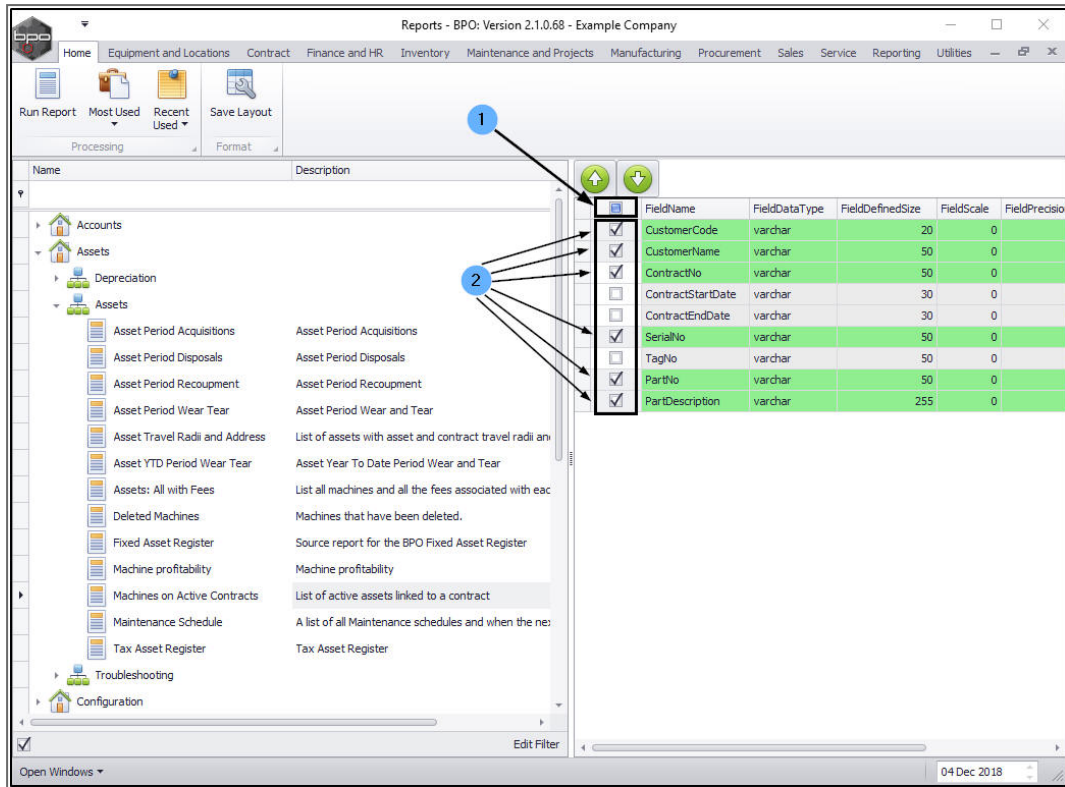
Note: Un-tick the check box in the column header row to deselect all the field/column check boxes.



SELECT REQUIRED FIELDS/COLUMNS

You can select the *individual* field(s) that you require.

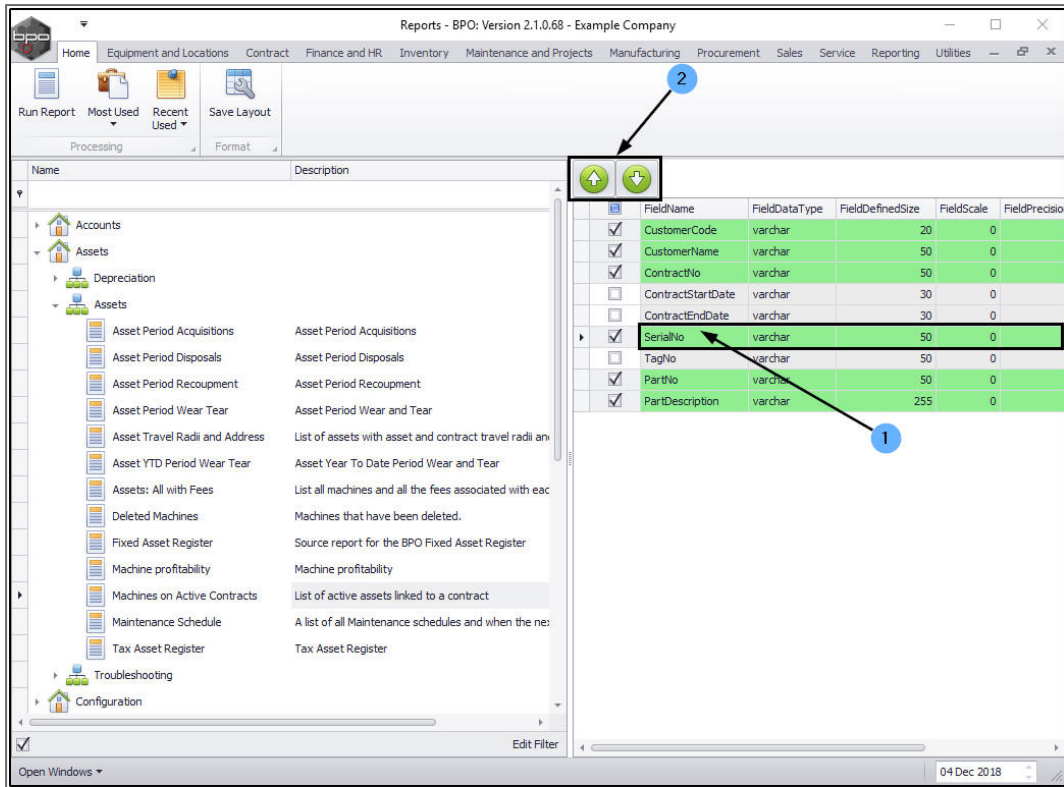
1. To quick clear all the columns, **un-tick** the checkbox in the column header row.
2. Then click on the check box in the row of **each** of the fields/columns that you wish to see displayed on the report.



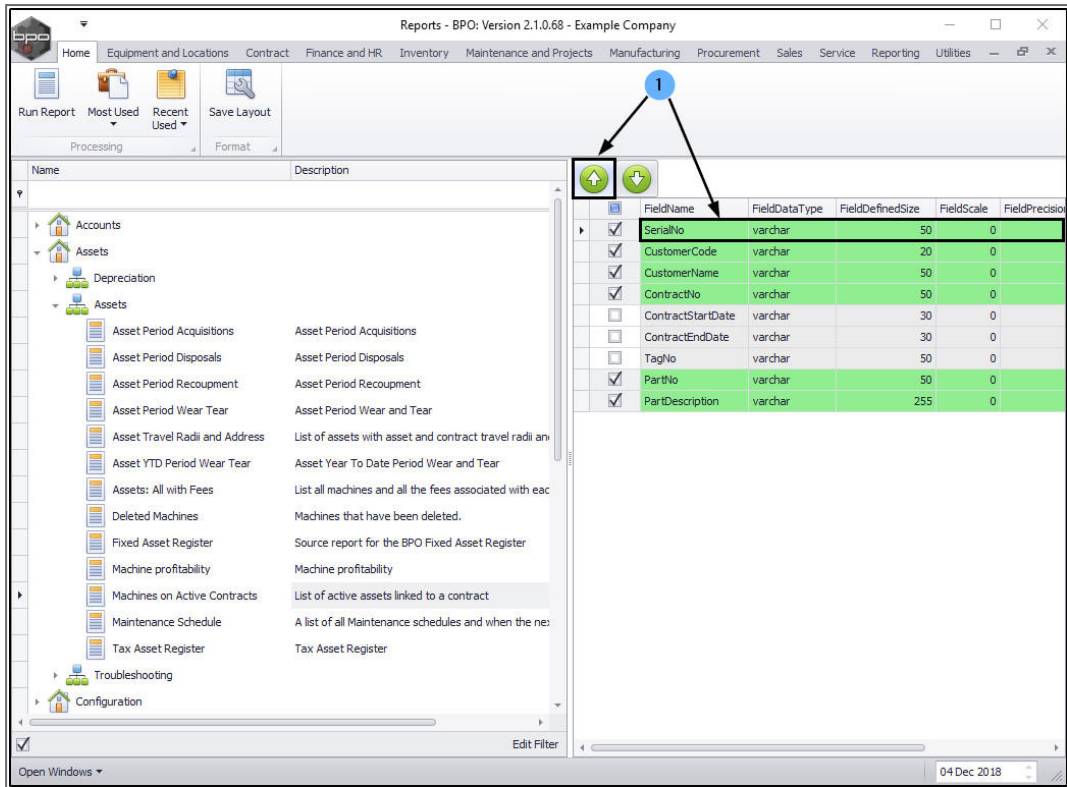
SORTING FIELDS/COLUMNS

You can **sort** the fields into the order you require.

1. Click in the **row** of the field that you wish to **move**.
2. Click on the **directional arrows** to move the selected field **up** or **down**.

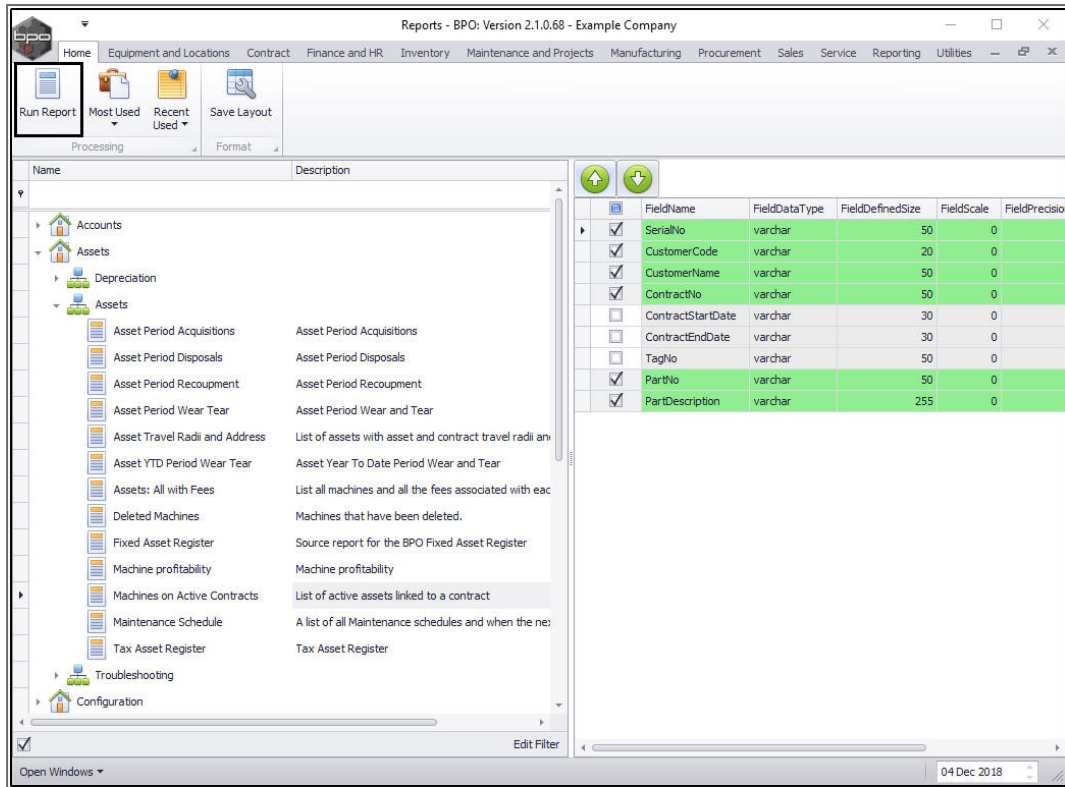


1. In this image you can see the **Serial No.** column has been moved **up** the top of the **Field Name** list, using the **Up** directional arrow.



PREVIEW THE REPORT

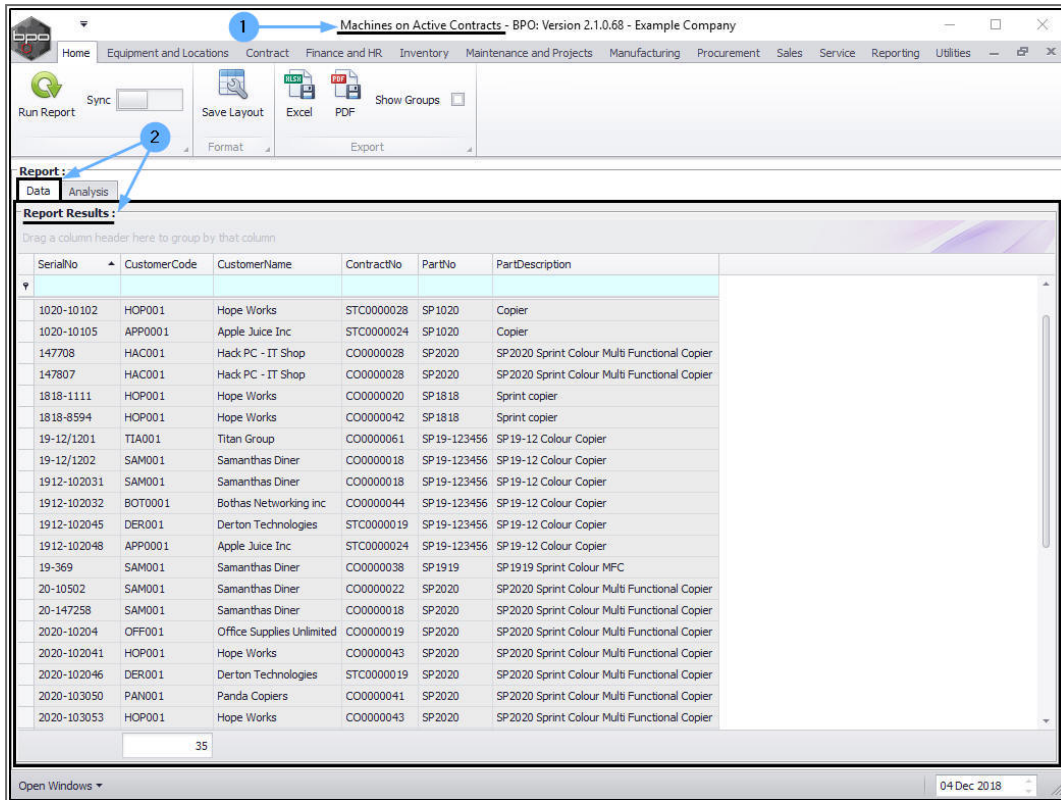
- When you have finished customising the report, click on **Run Report**.



1. The **title** of this screen that opens will be dependant on the report that has been selected in the previous step. In this example, the Machine on Active Contracts report was selected and this title is displayed in this screen.

Note: This report may need to have parameters, such as a Start and End Date. Follow the process to [set these parameters](#) if required.

2. If no parameters are required, the **Report Results** will immediately be displayed in the **Data** frame. This is the **preview** version of what will be included in the final report.



EXPORT THE REPORT

You have a choice of exporting the report to **Excel** or a **PDF** format that can be printed, by clicking on the appropriate button in the Action button toolbar.

EXPORT TO EXCEL

- Click on *Excel*.

Machines on Active Contracts - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Run Report Sync Save Layout Excel PDF Show Groups

Report :

Data Analysis

Report Results :

Drag a column header here to group by that column

| SerialNo | CustomerCode | CustomerName | ContractNo | PartNo | PartDescription |
|-------------|--------------|---------------------------|------------|-------------|--|
| 1020-10102 | HOP001 | Hope Works | STC0000028 | SP1020 | Copier |
| 1020-10105 | APP0001 | Apple Juice Inc | STC0000024 | SP1020 | Copier |
| 147708 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 147807 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 1818-1111 | HOP001 | Hope Works | CO0000020 | SP1818 | Sprint copier |
| 1818-8594 | HOP001 | Hope Works | CO0000042 | SP1818 | Sprint copier |
| 19-12/1201 | TIA001 | Titan Group | CO0000061 | SP19-123456 | SP19-12 Colour Copier |
| 19-12/1202 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102031 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102032 | BOT0001 | Bothas Networking inc | CO0000044 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102045 | DER001 | Derton Technologies | STC0000019 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102048 | APP0001 | Apple Juice Inc | STC0000024 | SP19-123456 | SP19-12 Colour Copier |
| 19-369 | SAM001 | Samanthas Diner | CO0000038 | SP1919 | SP1919 Sprint Colour MFC |
| 20-10502 | SAM001 | Samanthas Diner | CO0000022 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 20-147258 | SAM001 | Samanthas Diner | CO0000018 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-10204 | OFF001 | Office Supplies Unlimited | CO0000019 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-102041 | HOP001 | Hope Works | CO0000043 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-102046 | DER001 | Derton Technologies | STC0000019 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103050 | PAN001 | Panda Copiers | CO0000041 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103053 | HOP001 | Hope Works | CO0000043 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103053 | HOP001 | Hope Works | STC0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |

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Open Windows 04 Dec 2018

- The report will open in your screen in **Excel** format.

Note: You will need to use your Excel skills to edit columns widths, etc. to view the report correctly before printing.

| SerialNo | CustomerCode | CustomerName | ContractNo | PartNo | PartDescription |
|----------|--------------|----------------|---------------------------|------------|---|
| 2 | YES001 | Young Electric | CO0000031 | SP204 | SP204 Colour Copier |
| 3 | YES001 | Young Electric | CO0000031 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 4 | 1020-10102 | HOP001 | Hope Works | STC0000028 | SP1020 Copier |
| 5 | 1020-10105 | APP0001 | Apple Juice Inc | STC0000024 | SP1020 Copier |
| 6 | 147708 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 Sprint Colour Multi Functional Copier |
| 7 | 147807 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 Sprint Colour Multi Functional Copier |
| 8 | 1818-1111 | HOP001 | Hope Works | CO0000020 | SP1818 Sprint copier |
| 9 | 1818-8594 | HOP001 | Hope Works | CO0000042 | SP1818 Sprint copier |
| 10 | 19-12/1201 | TIA001 | Titan Group | CO0000061 | SP19-123456 SP19-12 Colour Copier |
| 11 | 19-12/1202 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 SP19-12 Colour Copier |
| 12 | 1912-102031 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 SP19-12 Colour Copier |
| 13 | 1912-102032 | BOT0001 | Bothas Networking Inc | CO0000044 | SP19-123456 SP19-12 Colour Copier |
| 14 | 1912-102045 | DER001 | Derton Technologies | STC0000019 | SP19-123456 SP19-12 Colour Copier |
| 15 | 1912-102048 | APP0001 | Apple Juice Inc | STC0000024 | SP19-123456 SP19-12 Colour Copier |
| 16 | 19-369 | SAM001 | Samanthas Diner | CO0000038 | SP1919 SP1919 Sprint Colour MFC |
| 17 | 20-10502 | SAM001 | Samanthas Diner | CO0000022 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 18 | 20-147258 | SAM001 | Samanthas Diner | CO0000018 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 19 | 2020-10204 | OFF001 | Office Supplies Unlimited | CO0000019 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 20 | 2020-102041 | HOP001 | Hope Works | CO0000043 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 21 | 2020-102046 | DER001 | Derton Technologies | STC0000019 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 22 | 2020-103050 | PAN001 | Panda Copiers | CO0000041 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 23 | 2020-103053 | HOP001 | Hope Works | CO0000043 | SP2020 SP2020 Sprint Colour Multi Functional Copier |
| 24 | 2020-103053 | HOP001 | Hope Works | STC0000028 | SP2020 SP2020 Sprint Colour Multi Functional Copier |

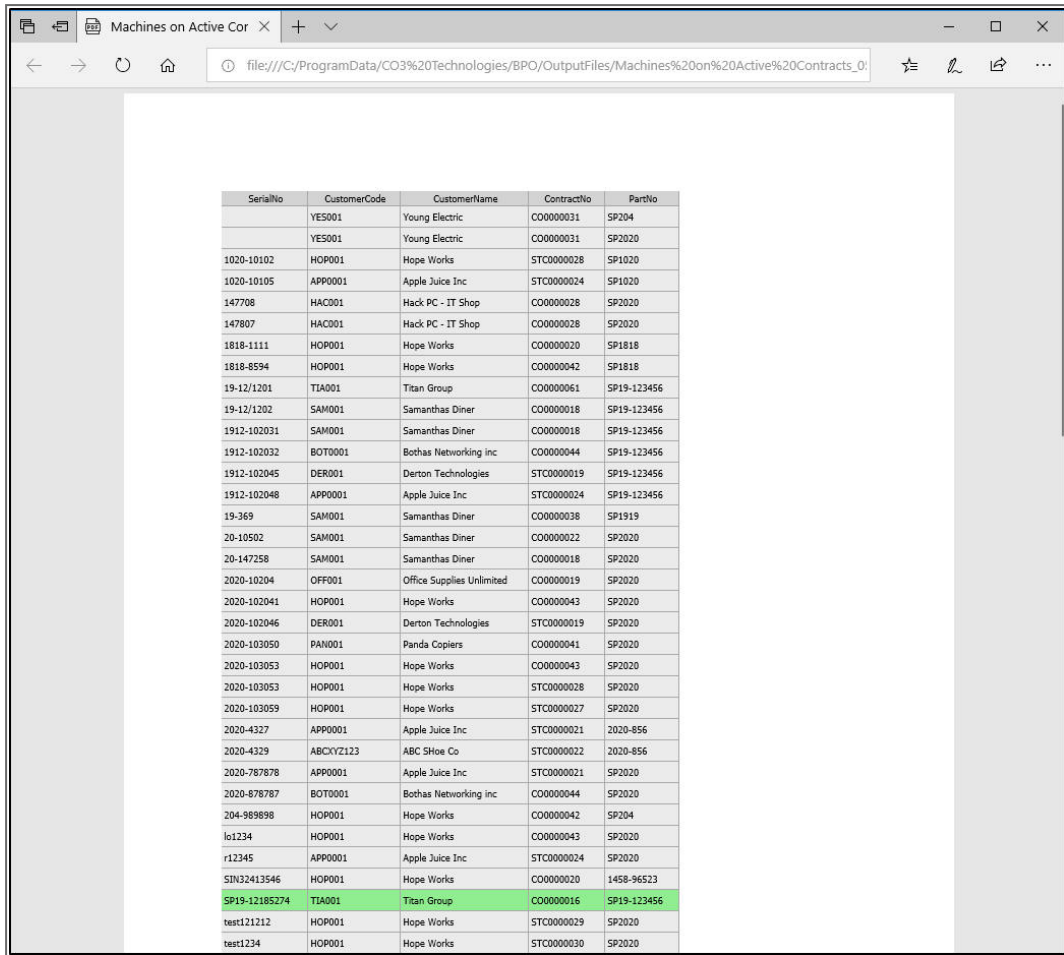
EXPORT TO PDF

- Click on *PDF*.

Report Results:

| SerialNo | CustomerCode | CustomerName | ContractNo | PartNo | PartDescription |
|-------------|--------------|---------------------------|------------|-------------|--|
| 1020-10102 | HOP001 | Hope Works | STC0000028 | SP1020 | Copier |
| 1020-10105 | APP0001 | Apple Juice Inc | STC0000024 | SP1020 | Copier |
| 147708 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 147807 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 1818-1111 | HOP001 | Hope Works | CO0000020 | SP1818 | Sprint copier |
| 1818-8594 | HOP001 | Hope Works | CO0000042 | SP1818 | Sprint copier |
| 19-12/1201 | TIA001 | Titan Group | CO0000061 | SP19-123456 | SP19-12 Colour Copier |
| 19-12/1202 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102031 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102032 | BOT0001 | Bothas Networking inc | CO0000044 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102045 | DER001 | Derton Technologies | STC0000019 | SP19-123456 | SP19-12 Colour Copier |
| 1912-102048 | APP0001 | Apple Juice Inc | STC0000024 | SP19-123456 | SP19-12 Colour Copier |
| 19-369 | SAM001 | Samanthas Diner | CO0000038 | SP1919 | SP1919 Sprint Colour MFC |
| 20-10502 | SAM001 | Samanthas Diner | CO0000022 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 20-147258 | SAM001 | Samanthas Diner | CO0000018 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-10204 | OFF001 | Office Supplies Unlimited | CO0000019 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-102041 | HOP001 | Hope Works | CO0000043 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-102046 | DER001 | Derton Technologies | STC0000019 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103050 | PAN001 | Panda Copiers | CO0000041 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103053 | HOP001 | Hope Works | CO0000043 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |
| 2020-103053 | HOP001 | Hope Works | STC0000028 | SP2020 | SP2020 Sprint Colour Multi Functional Copier |

- The report will open in your screen in **PDF** format.



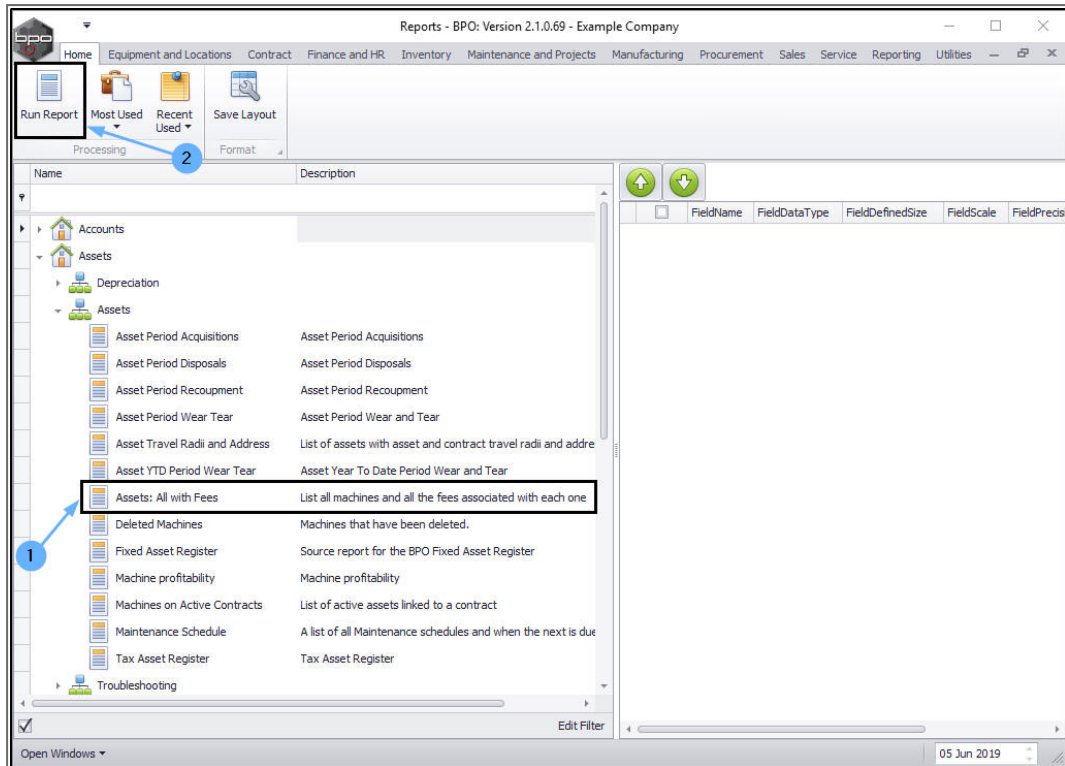
| SerialNo | CustomerCode | CustomerName | ContractNo | PartNo |
|---------------|--------------|---------------------------|------------|-------------|
| | YES001 | Young Electric | CO0000031 | SP204 |
| | YES001 | Young Electric | CO0000031 | SP2020 |
| 1020-10102 | HOP001 | Hope Works | STC0000028 | SP1020 |
| 1020-10105 | APP0001 | Apple Juice Inc | STC0000024 | SP1020 |
| 147708 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 |
| 147807 | HAC001 | Hack PC - IT Shop | CO0000028 | SP2020 |
| 1818-1111 | HOP001 | Hope Works | CO0000020 | SP1818 |
| 1818-8594 | HOP001 | Hope Works | CO0000042 | SP1818 |
| 19-12/1201 | TIA001 | Titan Group | CO0000061 | SP19-123456 |
| 19-12/1202 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 |
| 1912-102031 | SAM001 | Samanthas Diner | CO0000018 | SP19-123456 |
| 1912-102032 | BOT0001 | Bothas Networking inc | CO0000044 | SP19-123456 |
| 1912-102045 | DER001 | Derton Technologies | STC0000019 | SP19-123456 |
| 1912-102048 | APP0001 | Apple Juice Inc | STC0000024 | SP19-123456 |
| 19-369 | SAM001 | Samanthas Diner | CO0000038 | SP1919 |
| 20-10502 | SAM001 | Samanthas Diner | CO0000022 | SP2020 |
| 20-147258 | SAM001 | Samanthas Diner | CO0000018 | SP2020 |
| 2020-10204 | OFF001 | Office Supplies Unlimited | CO0000019 | SP2020 |
| 2020-102041 | HOP001 | Hope Works | CO0000043 | SP2020 |
| 2020-102046 | DER001 | Derton Technologies | STC0000019 | SP2020 |
| 2020-103050 | PAN001 | Panda Copiers | CO0000041 | SP2020 |
| 2020-103053 | HOP001 | Hope Works | CO0000043 | SP2020 |
| 2020-103053 | HOP001 | Hope Works | STC0000028 | SP2020 |
| 2020-103059 | HOP001 | Hope Works | STC0000027 | SP2020 |
| 2020-4327 | APP0001 | Apple Juice Inc | STC0000021 | 2020-856 |
| 2020-4329 | ABCXY2123 | ABC SHoe Co | STC0000022 | 2020-856 |
| 2020-787878 | APP0001 | Apple Juice Inc | STC0000021 | SP2020 |
| 2020-878787 | BOT0001 | Bothas Networking inc | CO0000044 | SP2020 |
| 204-989898 | HOP001 | Hope Works | CO0000042 | SP204 |
| lo1234 | HOP001 | Hope Works | CO0000043 | SP2020 |
| r12345 | APP0001 | Apple Juice Inc | STC0000024 | SP2020 |
| SIN32413546 | HOP001 | Hope Works | CO0000020 | 1458-96523 |
| SP19-12185274 | TIA001 | Titan Group | CO0000016 | SP19-123456 |
| test1211212 | HOP001 | Hope Works | STC0000029 | SP2020 |
| test1234 | HOP001 | Hope Works | STC0000030 | SP2020 |

GROUP A REPORT – USE THE 'SHOW GROUPS' FUNCTIONALITY

You can select to 'group' a report.

In the *Reports* listing screen;

- Select the report that you wish to run.
 - In this example, the sub report, *Assets: All with Fees* has been selected.
- Click on *Run Report*.



Remember, the **title** of this screen that opens will be dependant on the report that has been selected in the previous step.

1. In this example, the **Assets: All with Fees** report was selected and this title is displayed in this screen.
2. Select which column you wish to group the report by and drag and drop that **column header** into the **Group By** field.
 - In this example, the **Site Name** column is being dragged and dropped into the Group By field.

Note: You can select more than one column to 'group by'.

Assets: All with Fees - BPO: Version 2.1.0.69 - Example Company

Report Results:

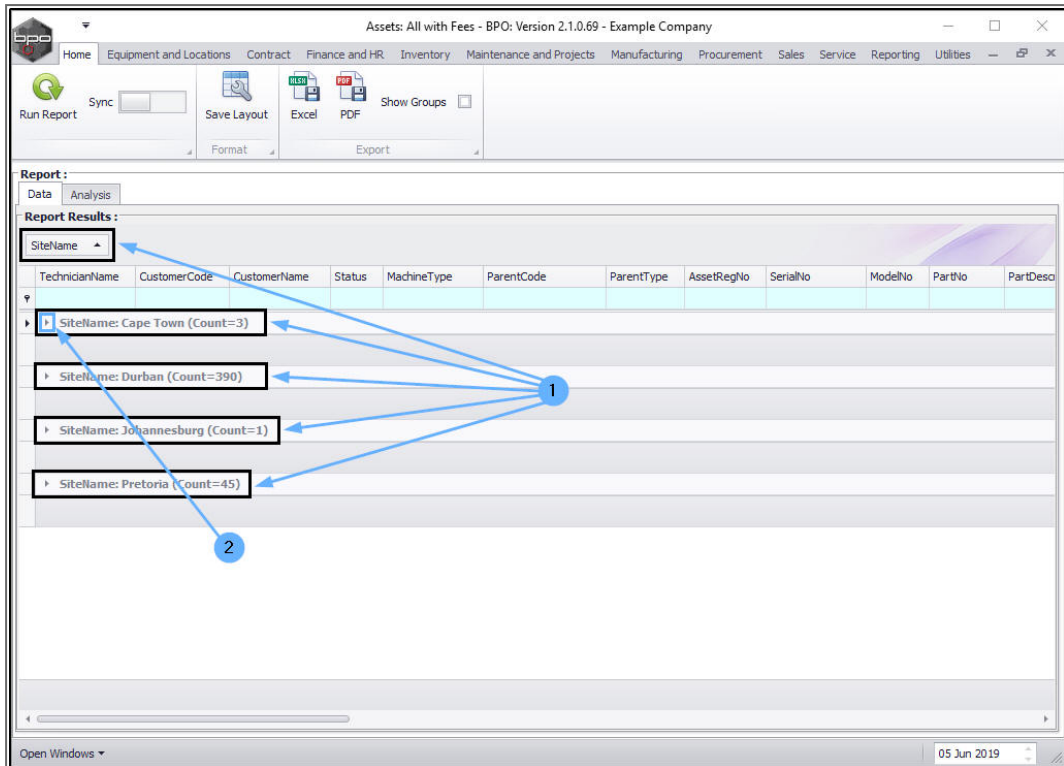
Drag a column header here to group by that column

| SiteName | TechnicianName | CustomerCode | CustomerName | Status | MachineType | ParentCode | ParentType | AssetRegNo | SerialNo | ModelNo | PartNo |
|-------------|----------------|--------------|-----------------|--------|------------------|-----------------------|------------|------------|----------------|----------|--------|
| ▶ Cape Town | | | | A | Serialised Stock | Main Bin-1 | Warehouse | AREG000344 | AB999012 | SP:2020 | SP:20 |
| ▶ Cape Town | | WES001 | Westwood Dyn... | A | Customer Machine | In Transit Bin CPT-01 | Warehouse | | 2020-10203 | SP2020 | SP20 |
| ▶ Cape Town | | HOP001 | Hope Works | A | Customer Machine | In Transit Bin CPT-01 | Warehouse | AREG000191 | 2020-43259 | SP2020 | SP20 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000260 | 478-1011 | 1020-478 | 1020 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000261 | 478-1012 | 1020-478 | 1020 |
| ▶ Durban | | HOP001 | Hope Works | A | Serialised Stock | CO0000062 | Contract | AREG000004 | 478-1234 | 1020-478 | 1020 |
| ▶ Durban | | OFF001 | Office Suppl... | A | Customer Machine | CO0000007 | Contract | | K147-123456789 | K147 | 1458 |
| ▶ Durban | | YES001 | Young Electric | A | Customer Machine | CO0000008 | Contract | | sin123 | K147 | 1458 |
| ▶ Durban | | | | A | Internal Asset | Internal Assets | Warehouse | | SIN13512345 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | | 14-9652365 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000375 | AM80003 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000376 | AM80004 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000377 | AM80005 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | DBN-A1 | Warehouse | AREG000378 | AM80006 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | George_Bin | Warehouse | AREG000373 | AM80001 | K147 | 1458 |
| ▶ Durban | | | | A | Serialised Stock | Intransit | Warehouse | AREG000374 | AM80002 | K147 | 1458 |
| ▶ Durban | | HOP001 | Hope Works | A | Customer Machine | CO0000020 | Contract | | SIN32413546 | K147 | 1458 |

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05 Jun 2019

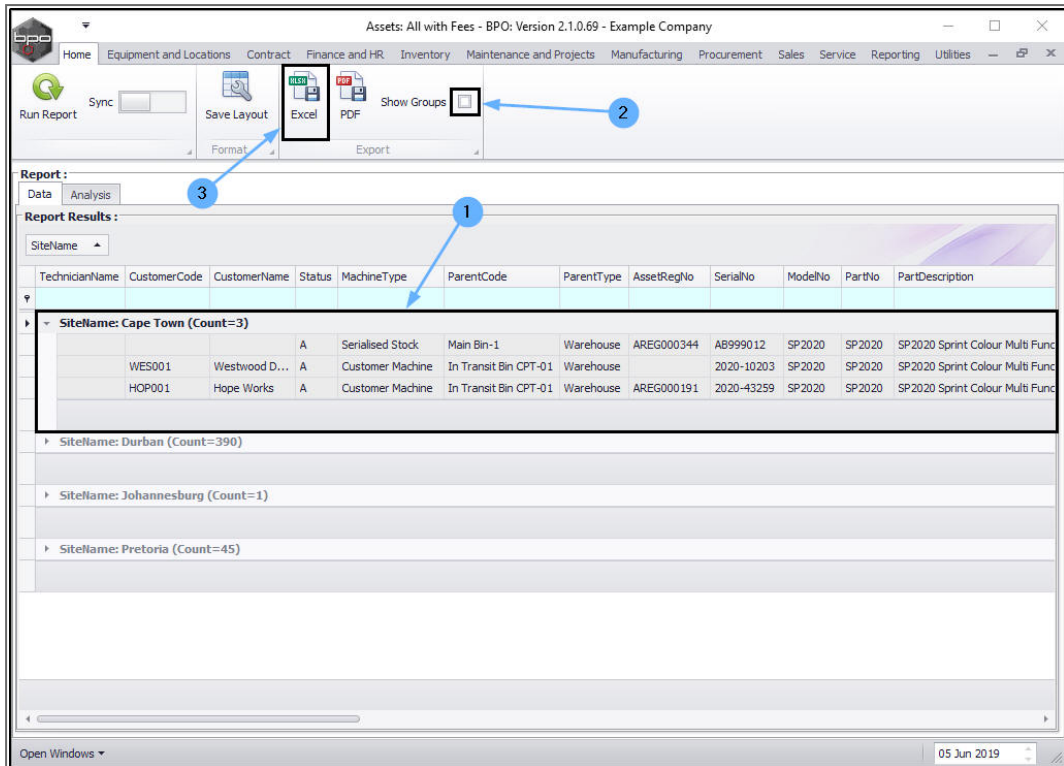
- The report will now be grouped by **sites** and you can view how many assets with fees are in **each** site.
 - Cape Town has 3
 - Durban has 390
 - Johannesburg has 1
 - Pretoria has 45
- Click on the **tree view node** in front of one of the sites.
 - In this example, **Cape Town** is selected.



1. All of the **assets with fees** linked to that site will now be listed under that site name.
 - In this example the **3** assets in Cape Town are listed.

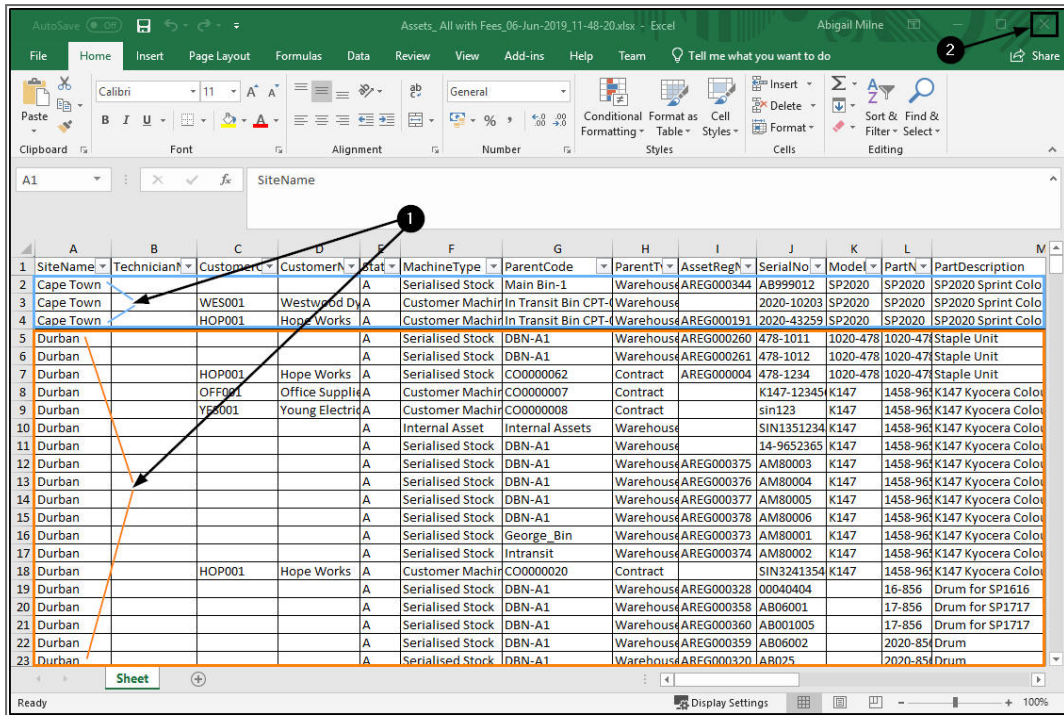
EXPORT REPORT WITHOUT USING THE 'SHOW GROUPS' FUNCTIONALITY

2. With the **Show Groups** check box unselected,
3. Click on **Excel**.



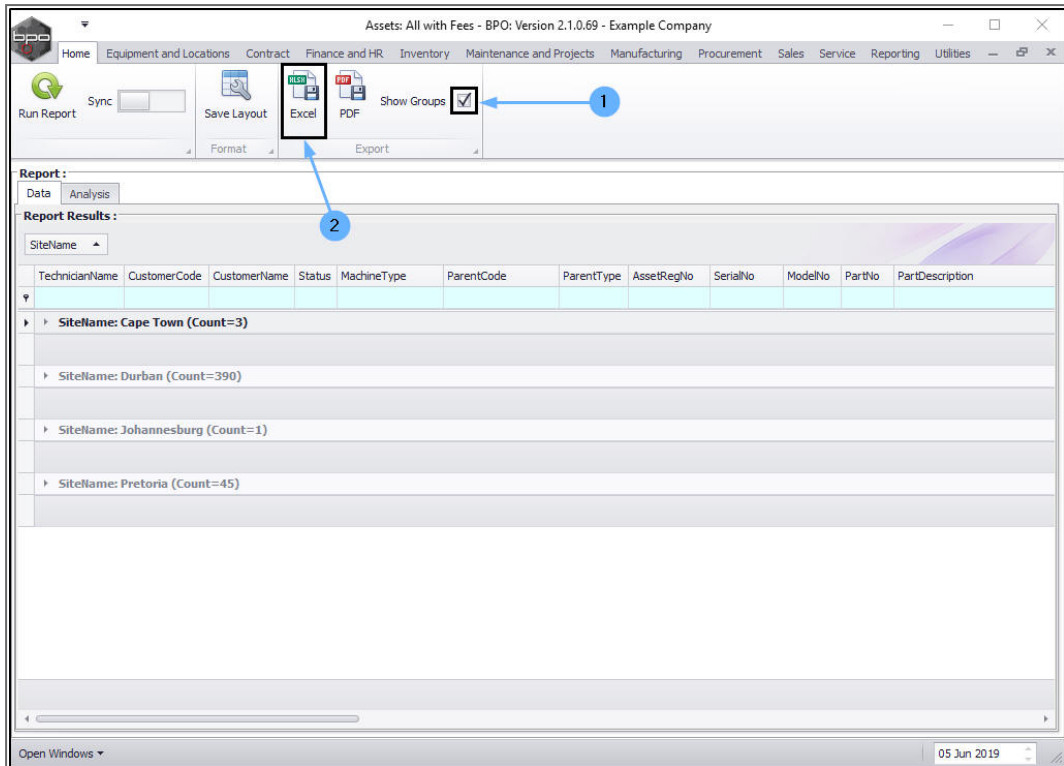
- **All** of the machines with fees in **each site** will be listed in an **Excel** spreadsheet.

1. In this example, you can see that Cape Town has **3** machines with fees and Durban has **390** (scroll down to see the remaining sites and linked assets with fees).
2. **Close** the spreadsheet.



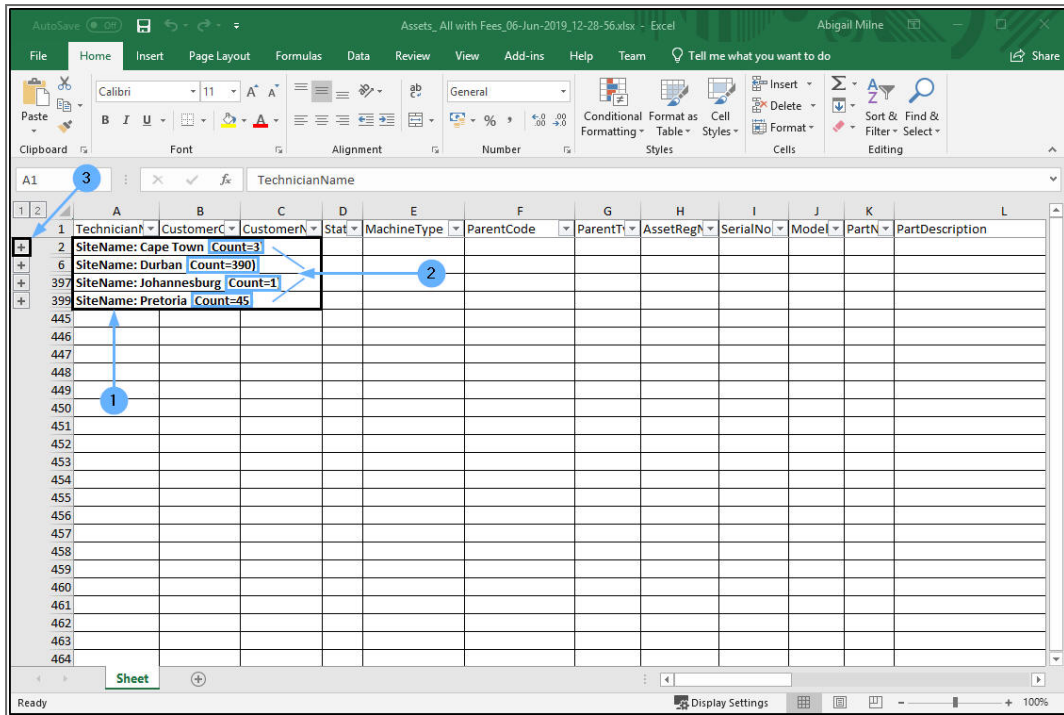
• You will return to the **Assets: All with Fees** screen.

1. Select the **Show Groups** checkbox, then
2. Click on **Excel**.



- The **Assets: All with Fees** spreadsheet will open.

1. Only a list of the **Site Names** will be displayed.
2. Next to each Site Name is the **Count** number of how many assets with fees are in that site.
3. In front of each Site Name is an **expand** button. Click on one of these buttons.
 - In this example, the **expand** button in front of **Cape Town** has been selected.



1. The spreadsheet will **expand** to reveal the rows of all the assets with fees linked to the Cape Town site (in this case 3 assets).
2. **Close** the spreadsheet when you are done.

| 1 | TechnicianN | CustomerC | CustomerName | Status | MachineType | ParentCode | ParentType | AssetRegN | SerialNo | Model | PartNo | PartDe |
|-----|----------------------------------|-----------|------------------|--------|------------------|-----------------------|------------|------------|------------|--------|--------|--------|
| 2 | SiteName: Cape Town (Count=3) | | | | | | | | | | | |
| 3 | | | | A | Serialised Stock | Main Bin-1 | Warehouse | AREG000344 | AB999012 | SP2020 | SP2020 | SP2020 |
| 4 | | WE5001 | Westwood Dynamic | A | Customer Machin | in Transit Bin CPT-01 | Warehouse | | 2020-10203 | SP2020 | SP2020 | SP2020 |
| 5 | | HOP001 | Hope Works | A | Customer Machin | in Transit Bin CPT-01 | Warehouse | AREG000191 | 2020-43259 | SP2020 | SP2020 | SP2020 |
| 6 | SiteName: Durban (Count=390) | | | | | | | | | | | |
| 397 | SiteName: Johannesburg (Count=1) | | | | | | | | | | | |
| 399 | SiteName: Pretoria (Count=45) | | | | | | | | | | | |
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- For more information about grouping and report customisation - refer to the [Report View](#) manual.

MNU.079.001