We are currently updating our site; thank you for your patience.

REPORTING

ALL REPORTS - DRS REPORTS CONFIGURATION

DRS reports are system reports that are configured to email at a set interval to a specific email recipient(s). Reports can be emailed daily, weekly, monthly etc. There is also a flag to determine whether the report should be emailed over weekends.

Important Note: The DRS Reporting Service must be installed in order to email the reports.

CONFIGURATION SETTINGS FOR DRS REPORTS

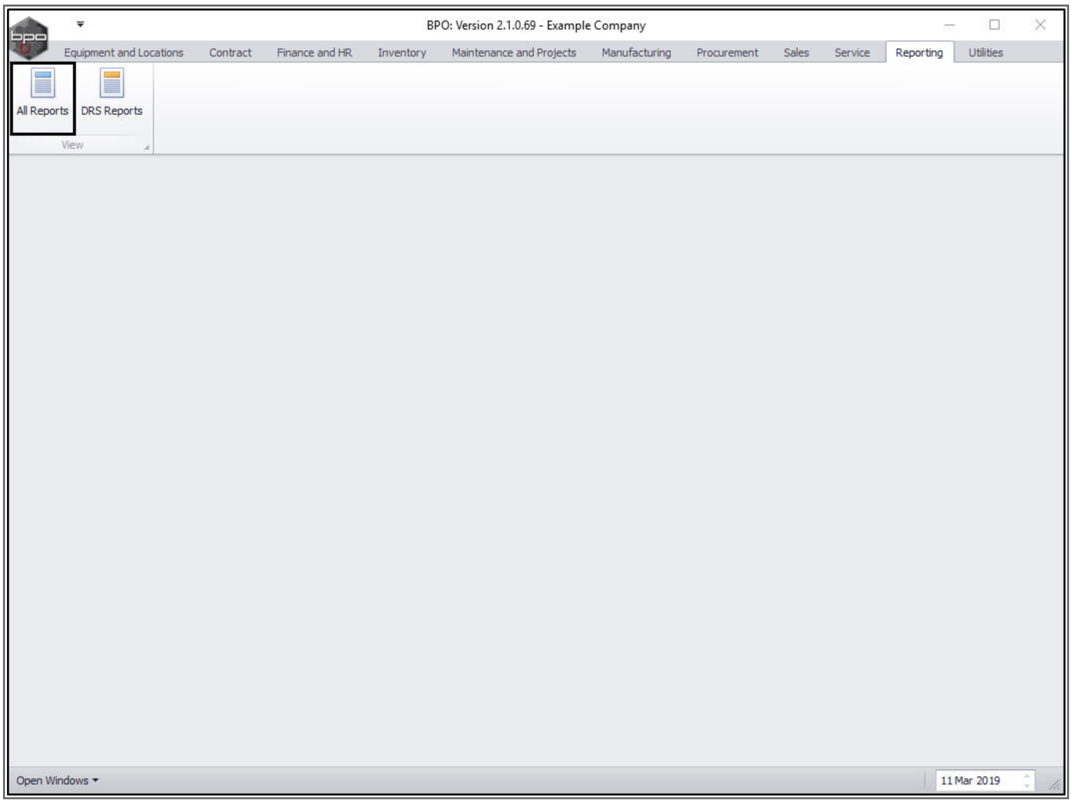
You have to configure the DRS template repository path, if its already configured, check that the configured path is correct. Your system administrator can help you to configure this. This is the path where the reports templates will be saved.

DRS REPORT TEMPLATES

DRS Report Templates are MS Excel templates. They must be saved in the DRS Report folder in the DRS template repository path location first before DRS reports can be added in the system. The format of the report template can be pulled from the system report you wish to be emailed.

Ribbon Access: Reporting > All Reports

STEP 1 REPORTING-ALL REPORTS



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

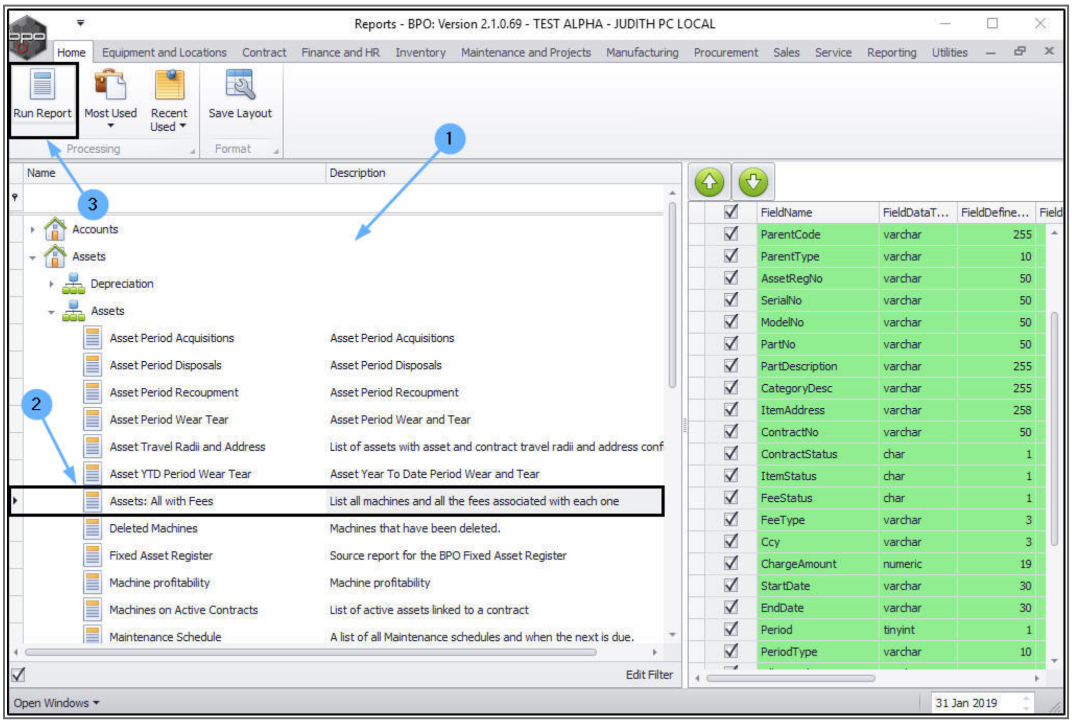
SELECT REPORT

1. Select from the list, the report that you wish to email.
    - For more information, please refer to introduction to all reports.
2. In this image, the **Assets: All with Fees** report has been selected.
3. Click on **Run Report**.

RUN REPORT

- **Note 1**: If the report you wish to email is not in the system, you can add one.

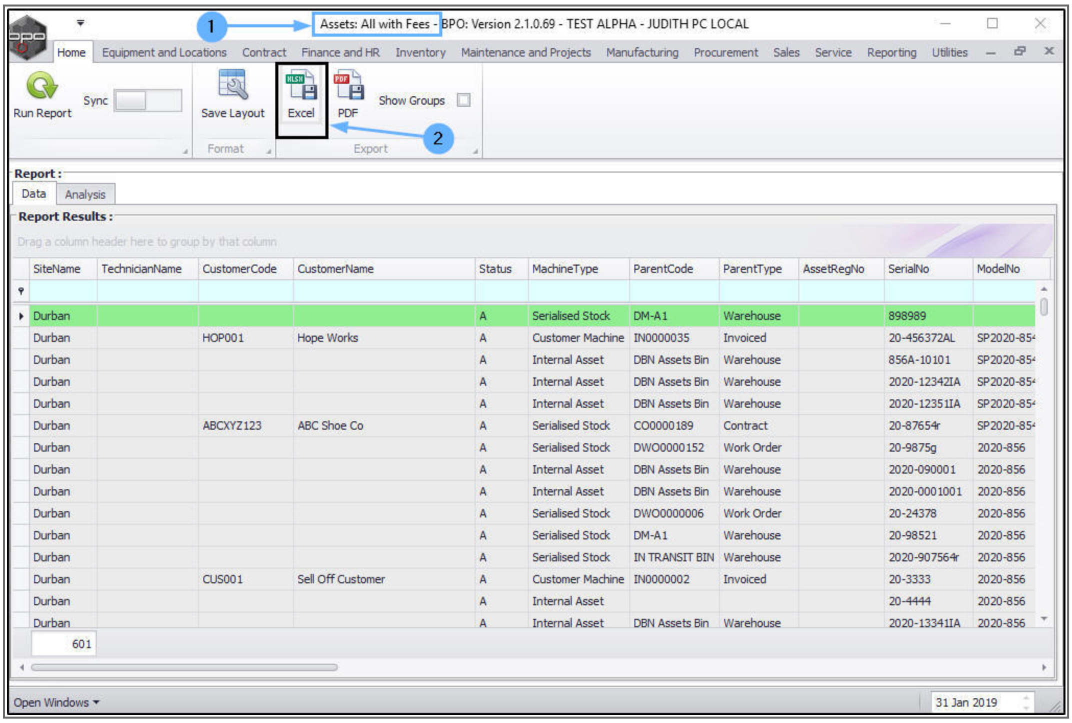
- **Note 2**: If you choose a report which requires parameters to be set, the report will pull data according the set parameters every time it runs. For example, if you set date parameters from 1 January 2019 to 1 March 2019, every time you get a report, the data retrieved will be within these date parameters.



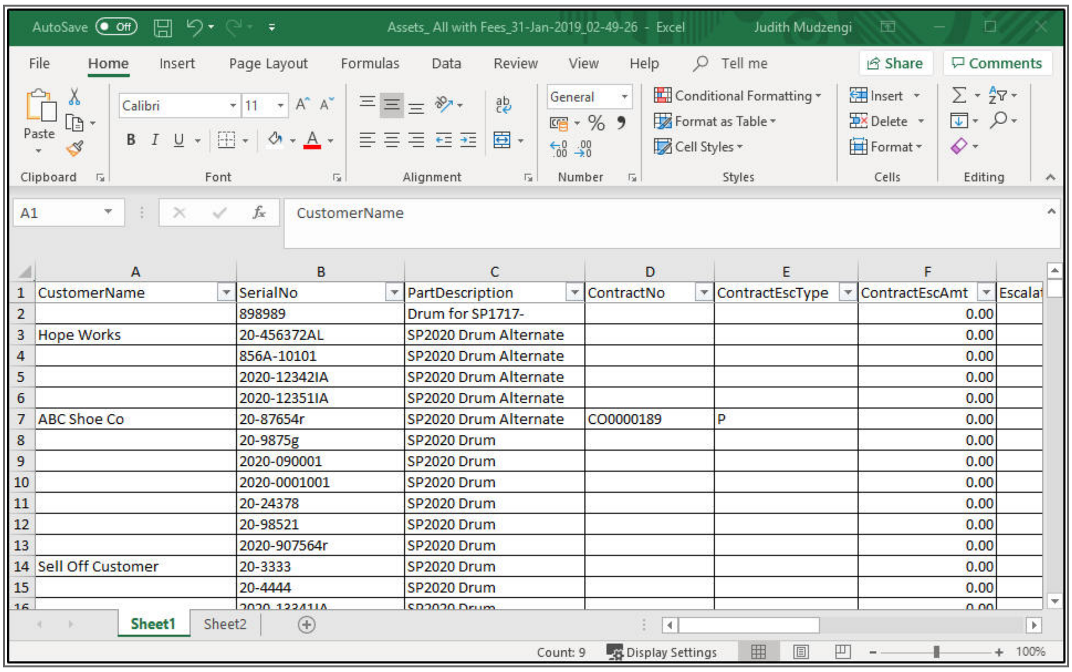
1. The **Report Screen** will be displayed with the name of the selected report in the title bar.

EXPORT TO EXCEL

1. Click on **Excel** to export the report to MS Excel.



- The report will open in **MS Excel**.

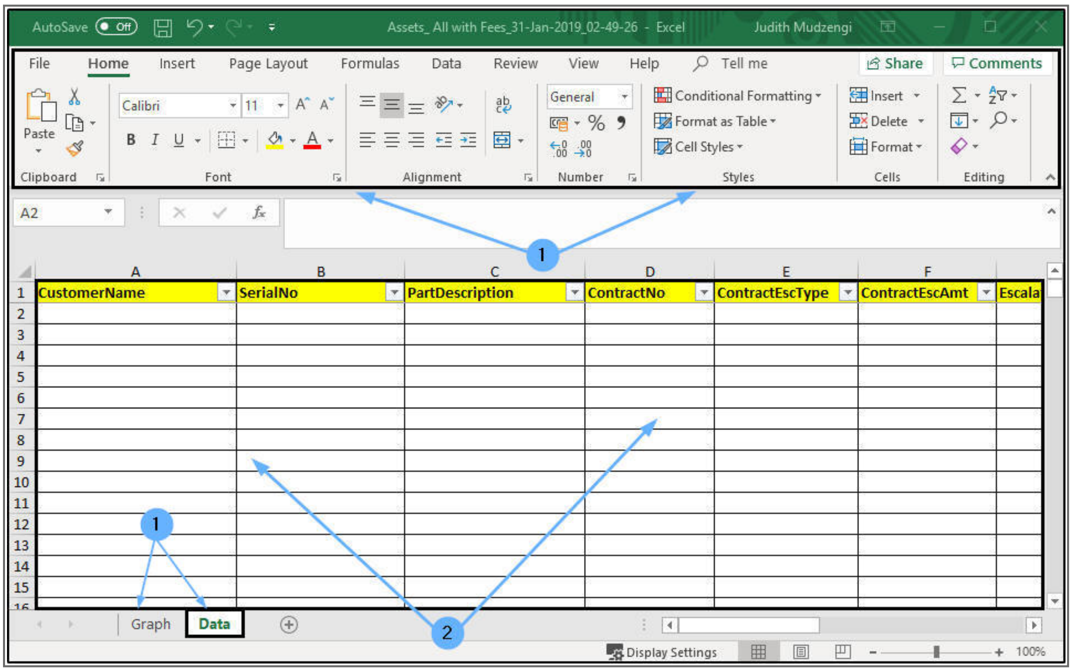


EDIT REPORT

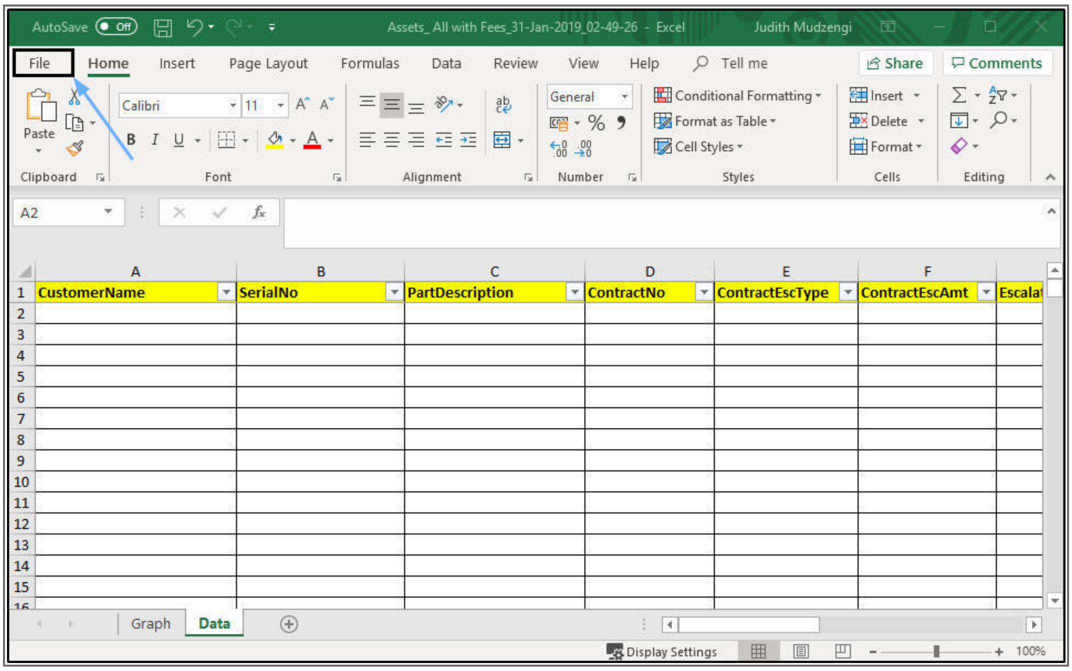
1. You can use the toolbar to **edit** the report according to your preferences. For example, **bold** any relevant text, or colour particular columns as desired. You can also add a pivot table(s) and rename sheets.

SAVE DRS REPORT TEMPLATE

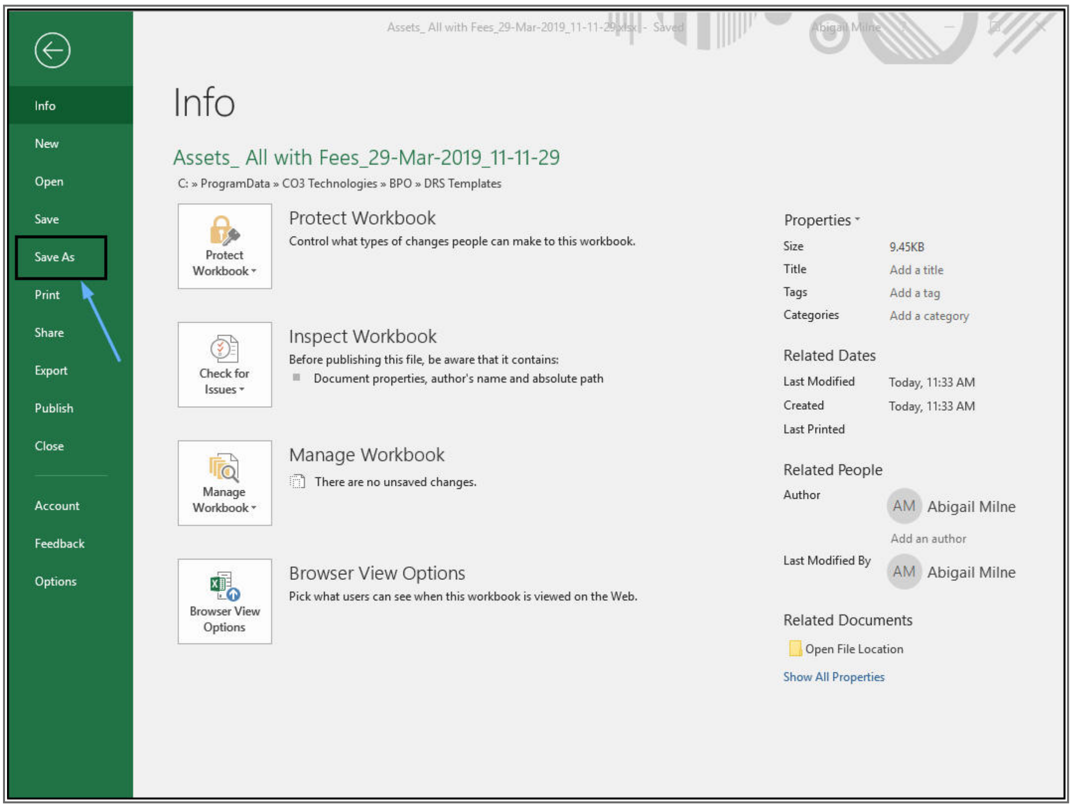
2. **Clear** all the data (apart from the headings row) before saving the template to the **DRS Reports** folder.



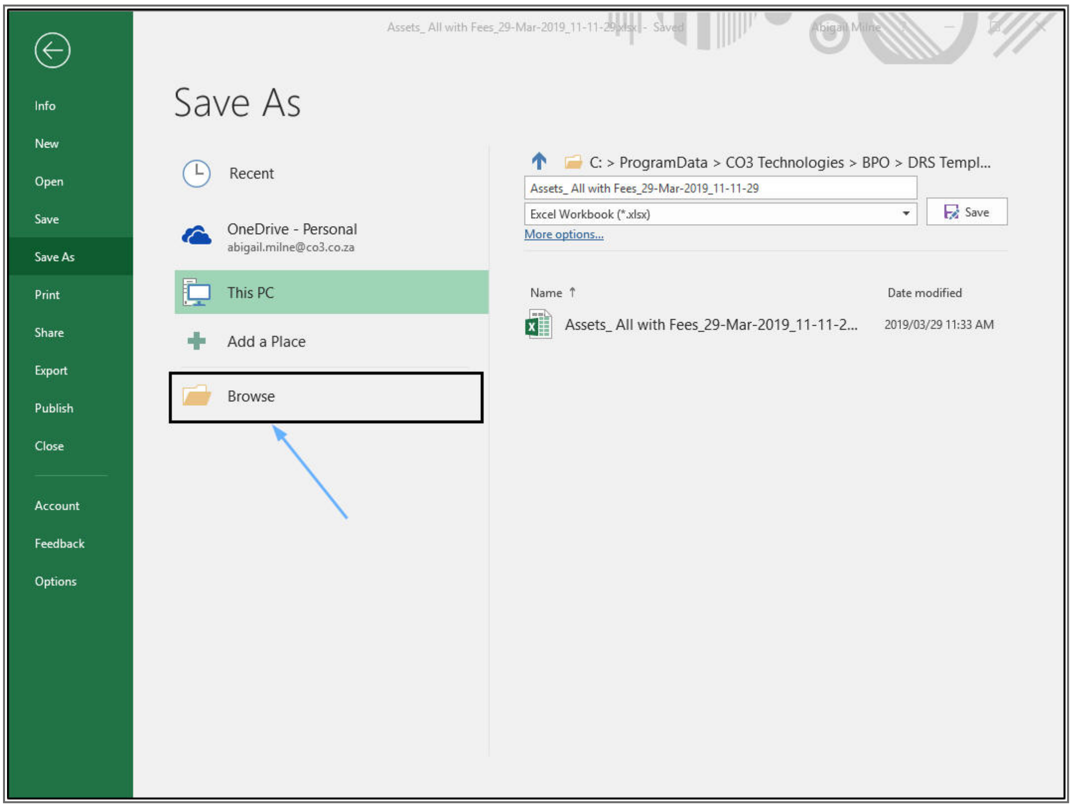
- Click on **File**.



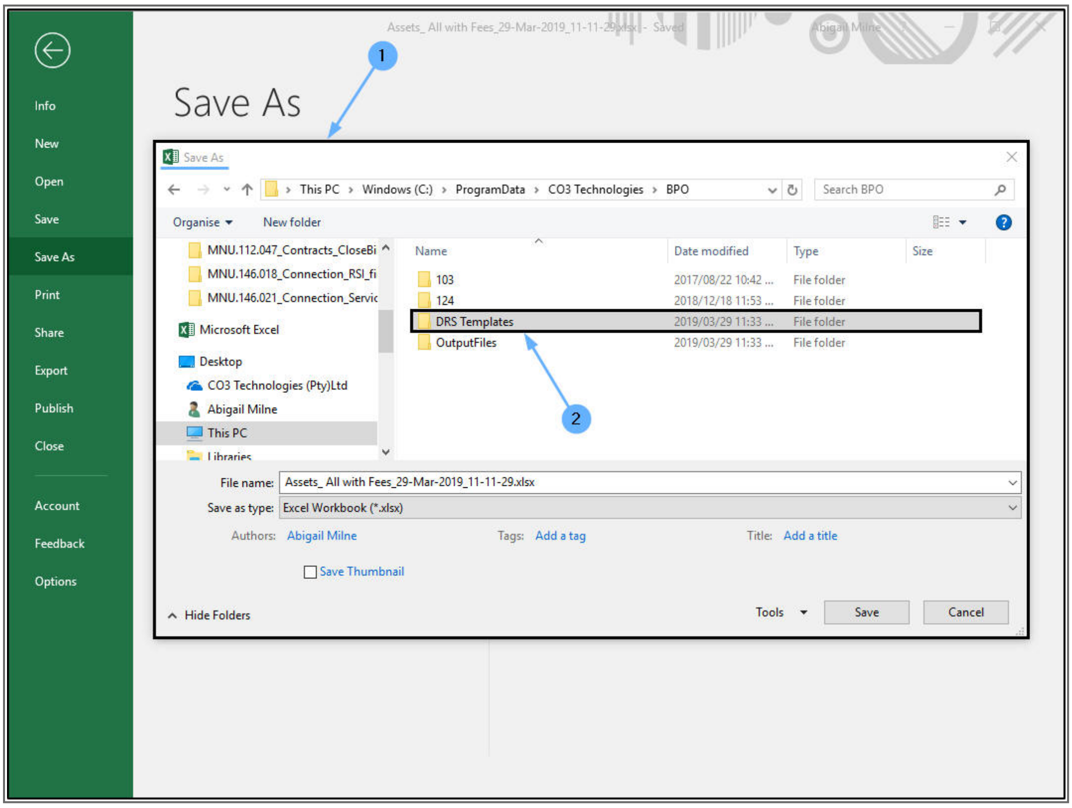
- Click on **Save As**.



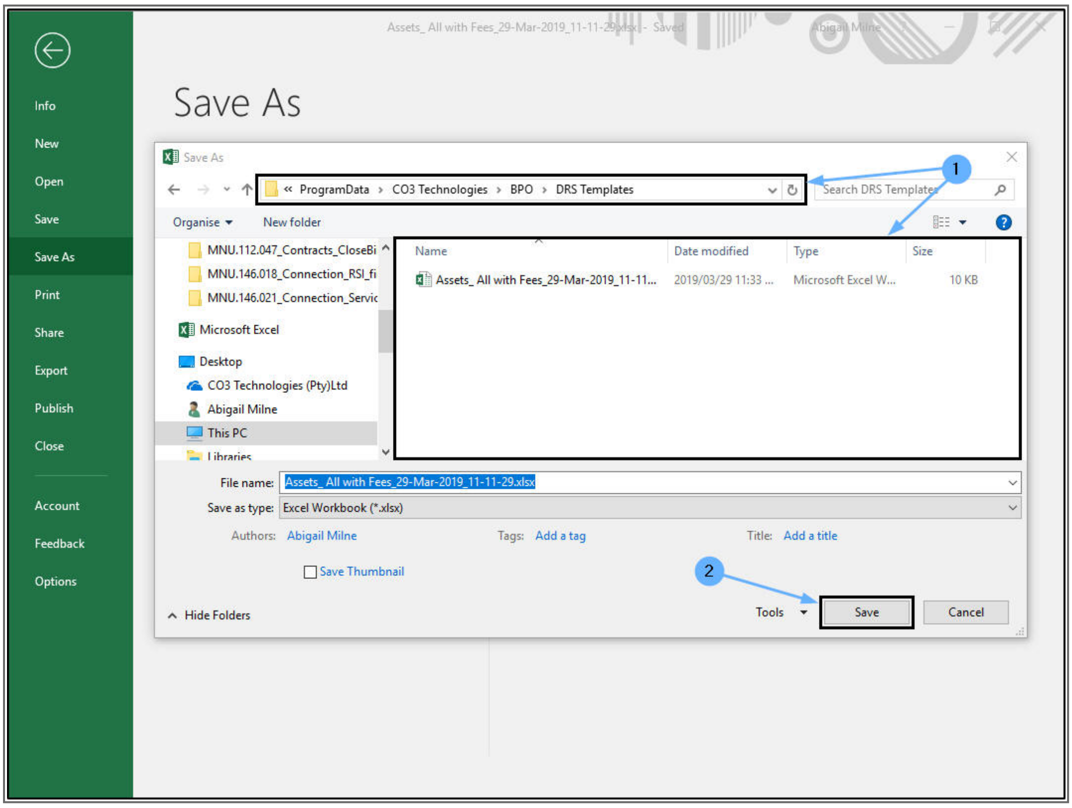
- Click on **Browse**.



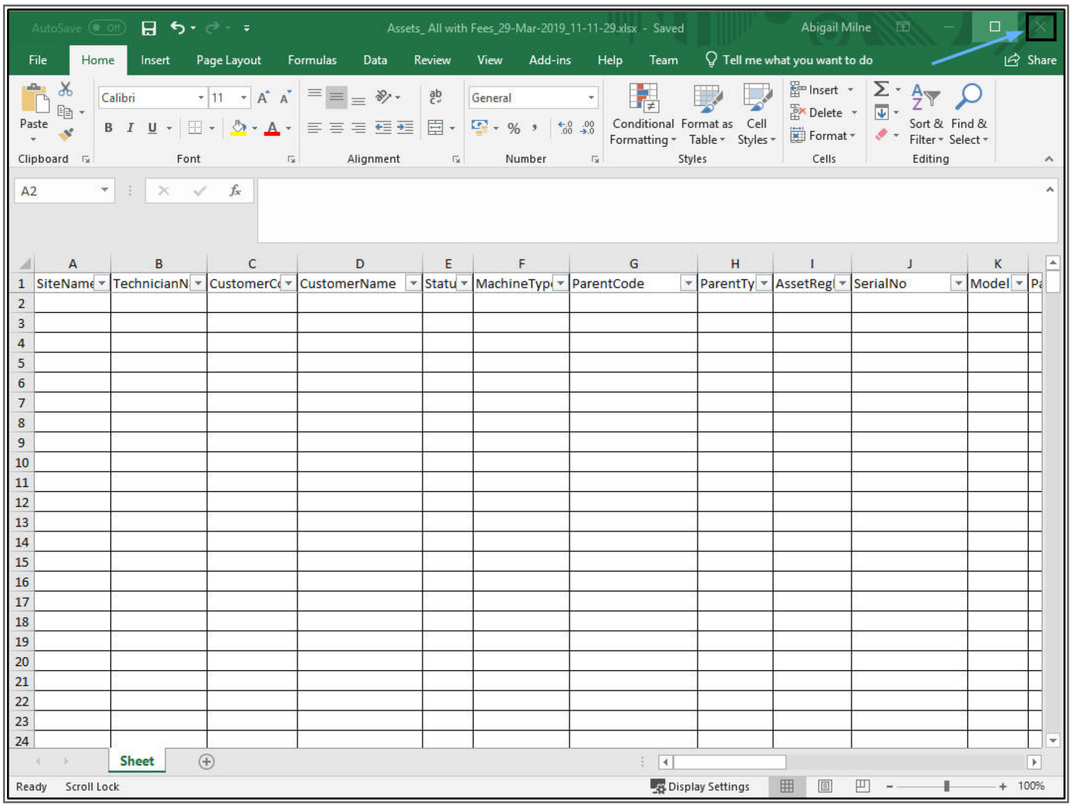
1. The **Save As** screen will pop up.
2. Search for the **DRS Templates** folder.



1. **Open** the DRS Templates folder.
2. **Save** the new report template in this folder.

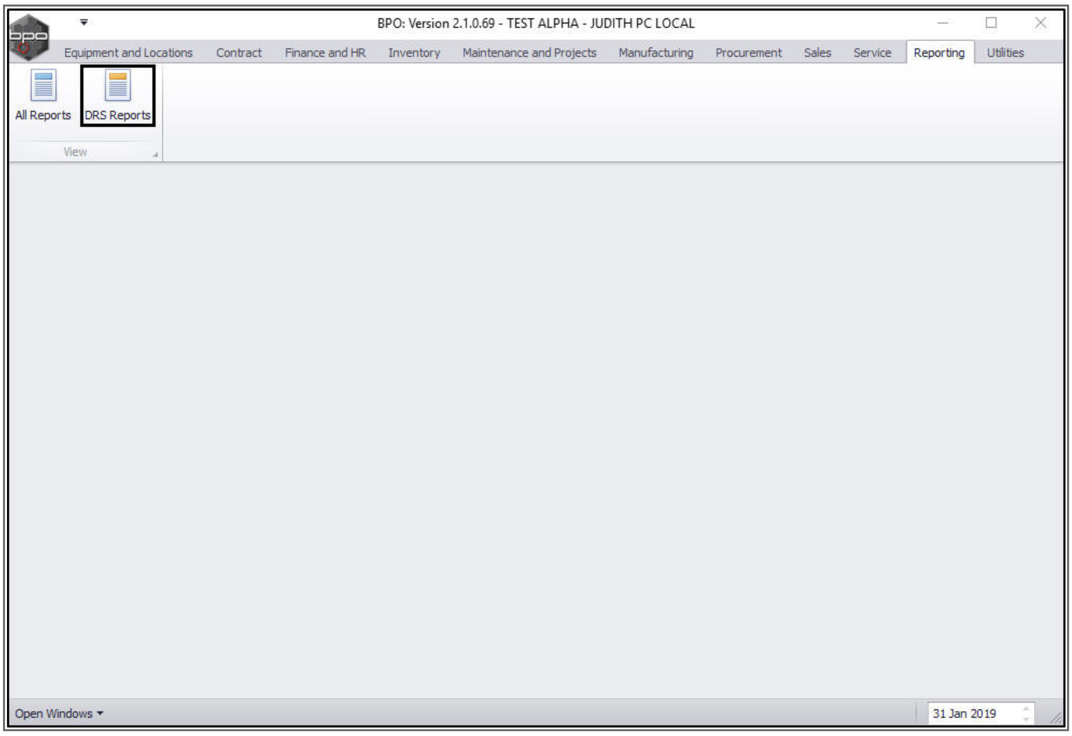


- The **Save As** screen will close and you will return to the **Excel spreadsheet**.
- **Close** this screen when you are done.

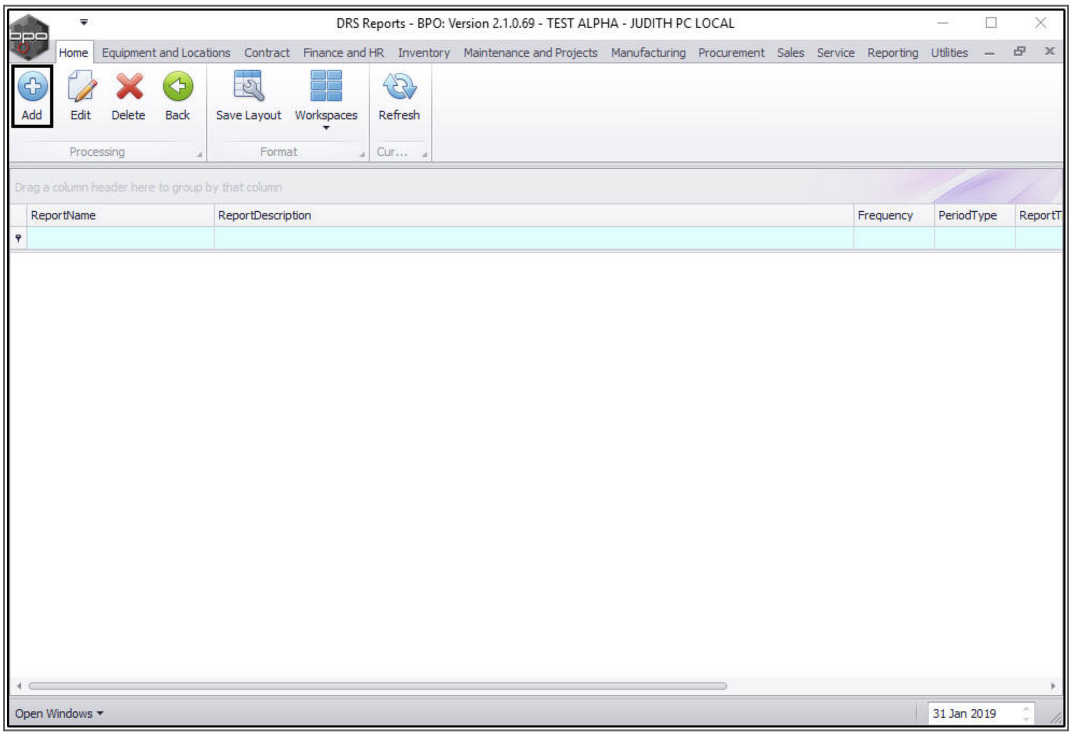


STEP 2 REPORTING-DRS REPORTS

Ribbon Access: Reporting > DRS Reports



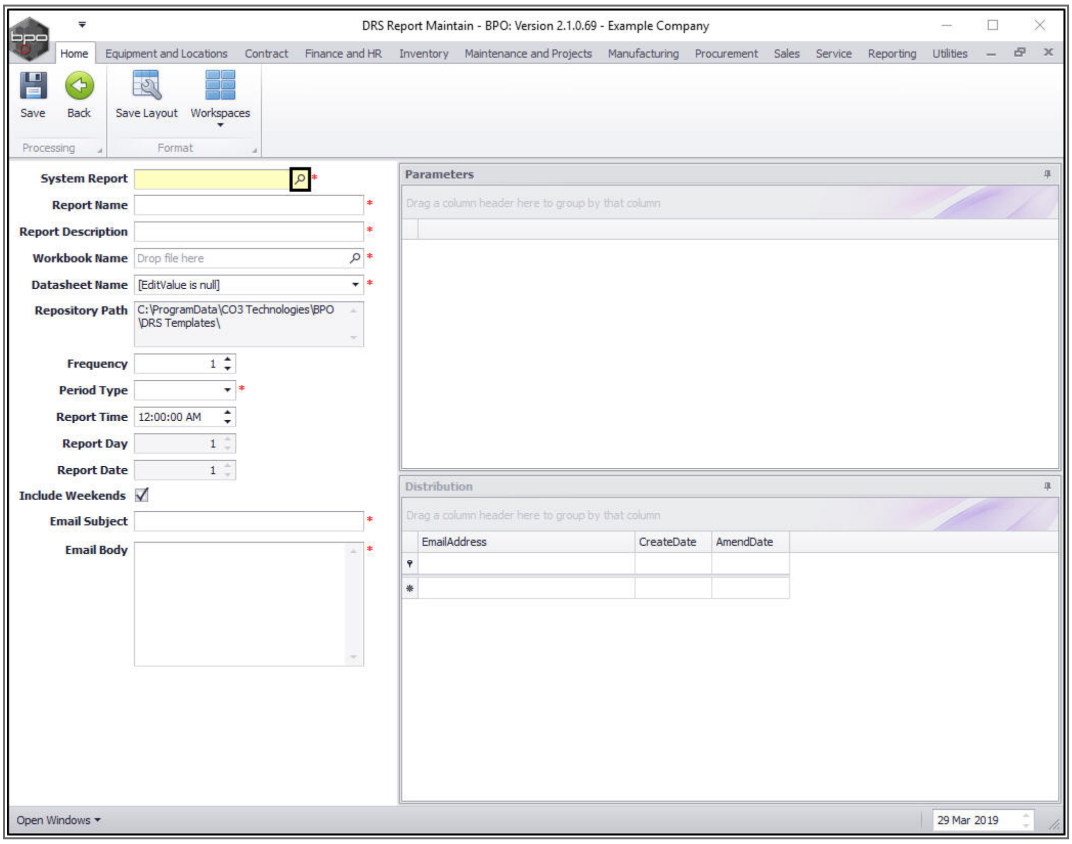
- The **DRS Reports** listing screen will be displayed.
- Click on **Add**.



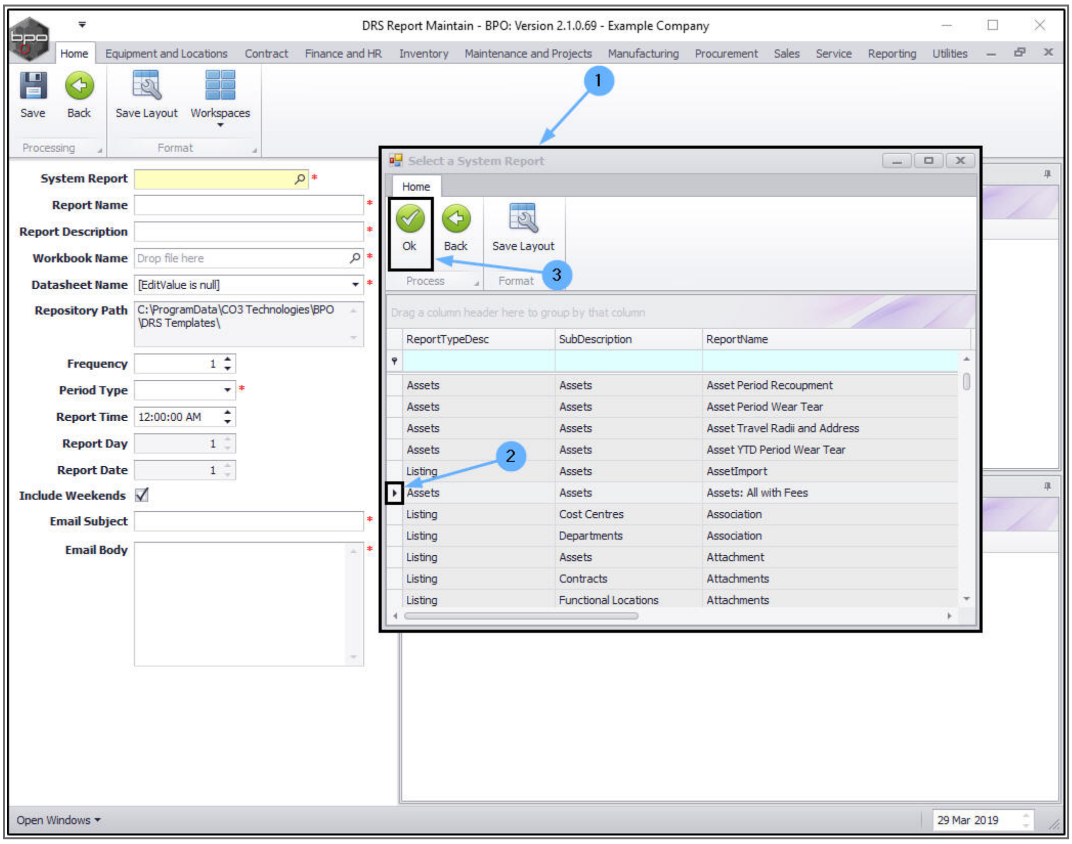
The **DRS Report Maintain** screen will be displayed.

SELECT REPORT

- Click on the **search** button in the **System Report** field.



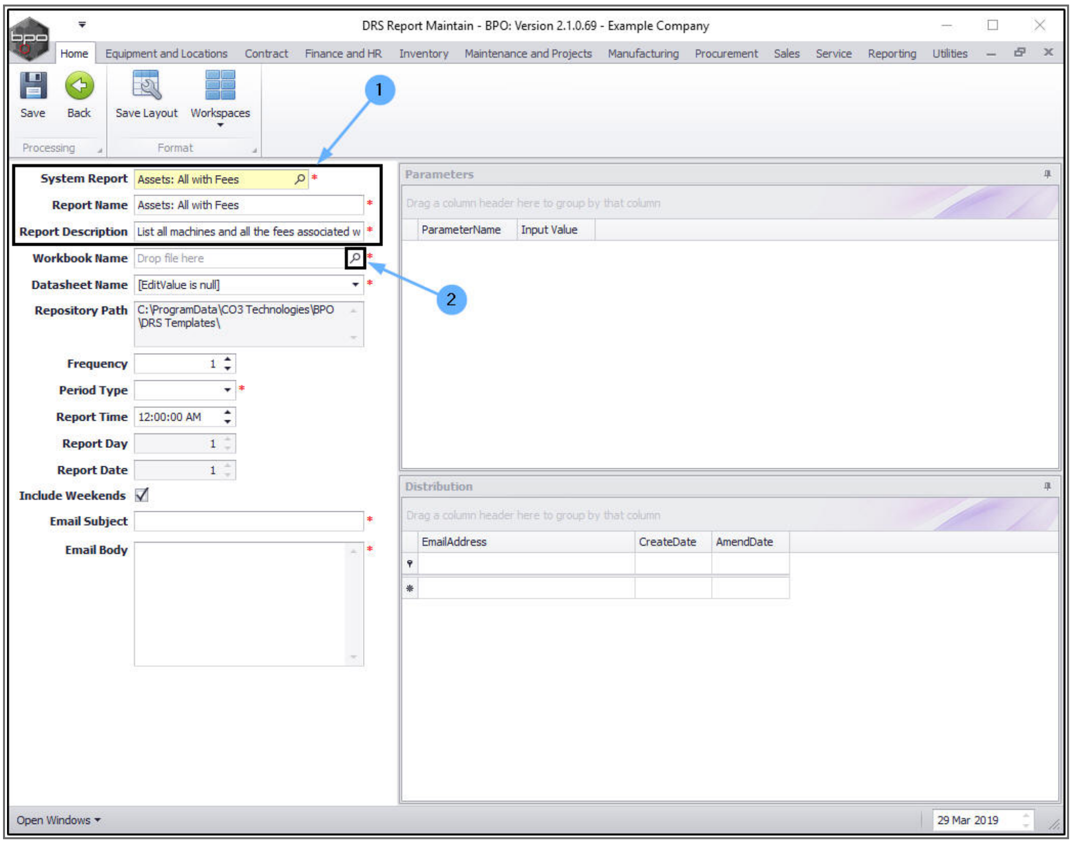
1. The **Select a System Report** screen will pop up.
2. Select the **row** of the **report** that you wish to email.
    - In this image, the **Assets: All with fees** report has been selected.
3. Click on **Ok**.



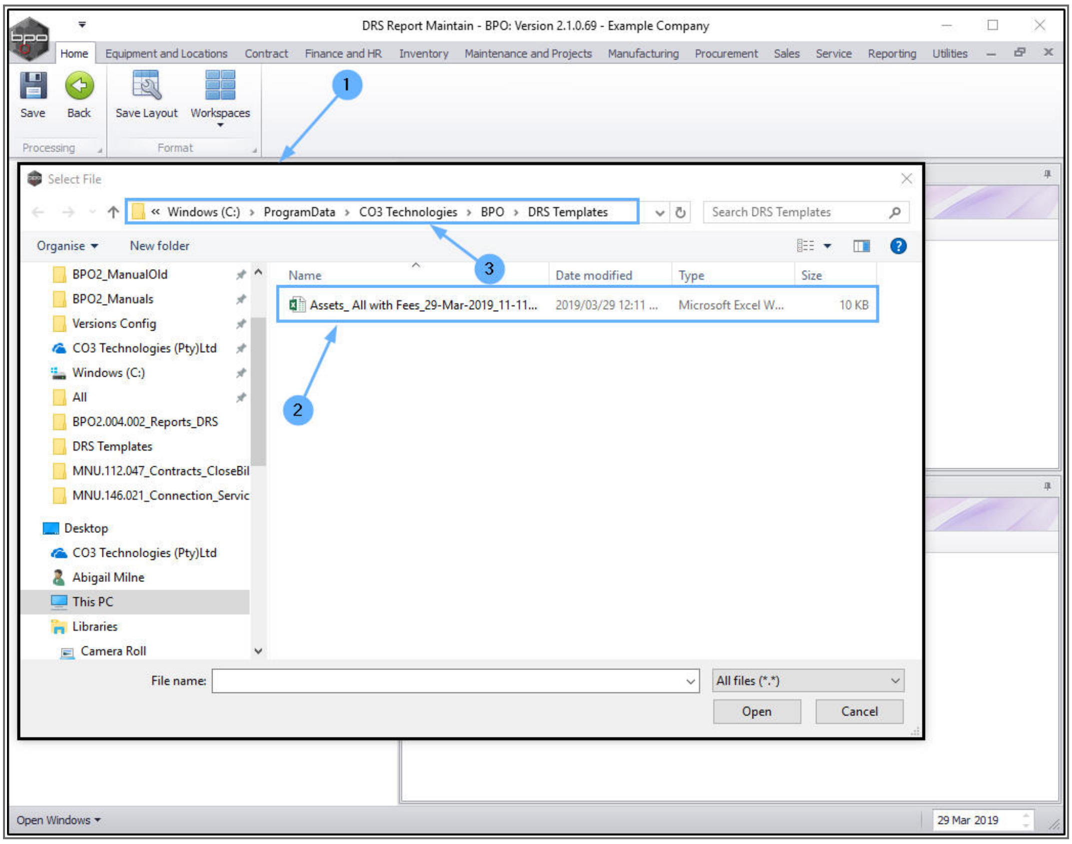
1. The following fields will now auto populate:
    - **System Report**,
    - **Report Name** and
    - **Report Description**.

SELECT WORKBOOK NAME

2. Click on the **search** button in the **Workbook Name** field.



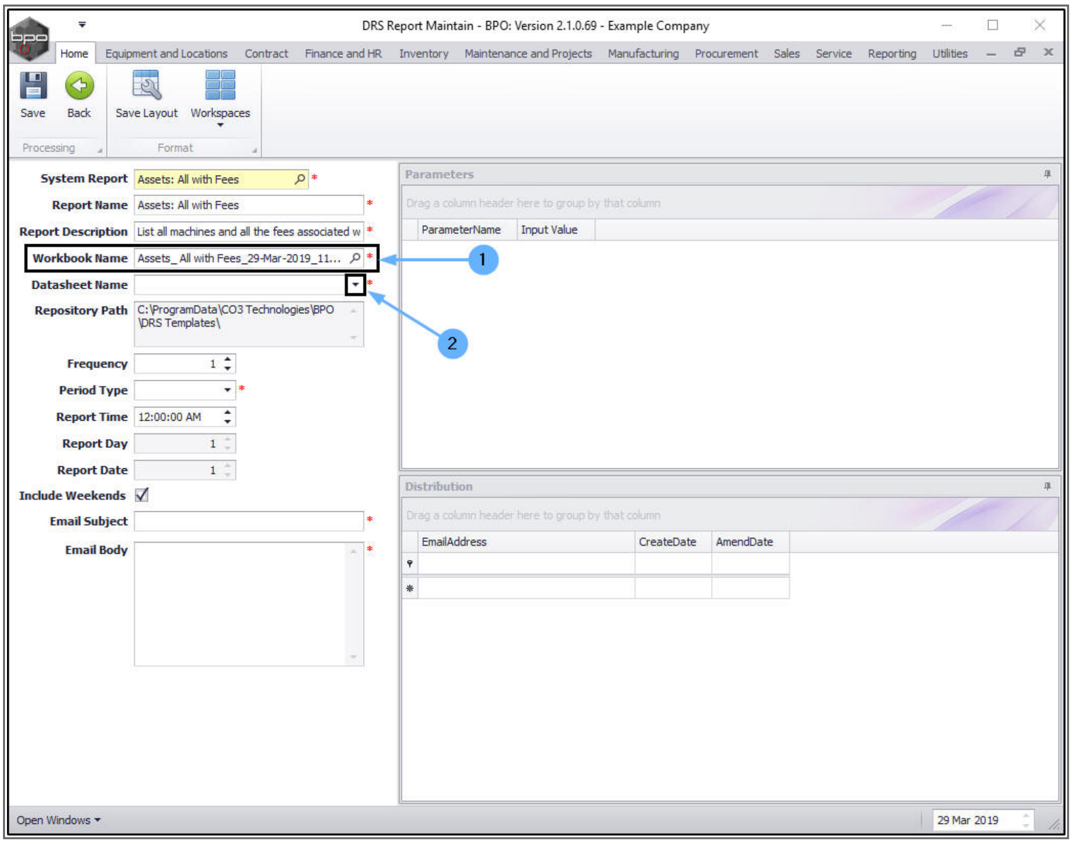
1. The **Select File** screen will pop up.
2. The template must have the same format with the report you are adding so that data will not be mismatched.
    - In this image, **Assets_All with Fees** MSExcel Template has been selected.
3. The template should be saved in the **DRS template repository path** location.



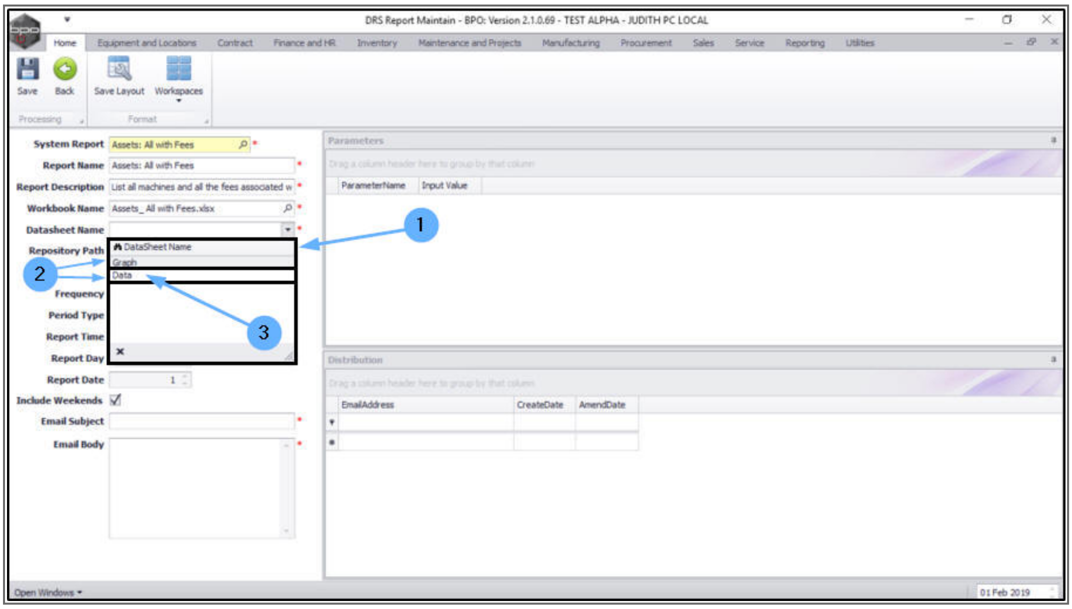
1. The **Workbook Name** field will now be populated.

SELECT DATASHEET NAME

2. Click on the **drop-down arrow** in the **Datasheet Name** field.

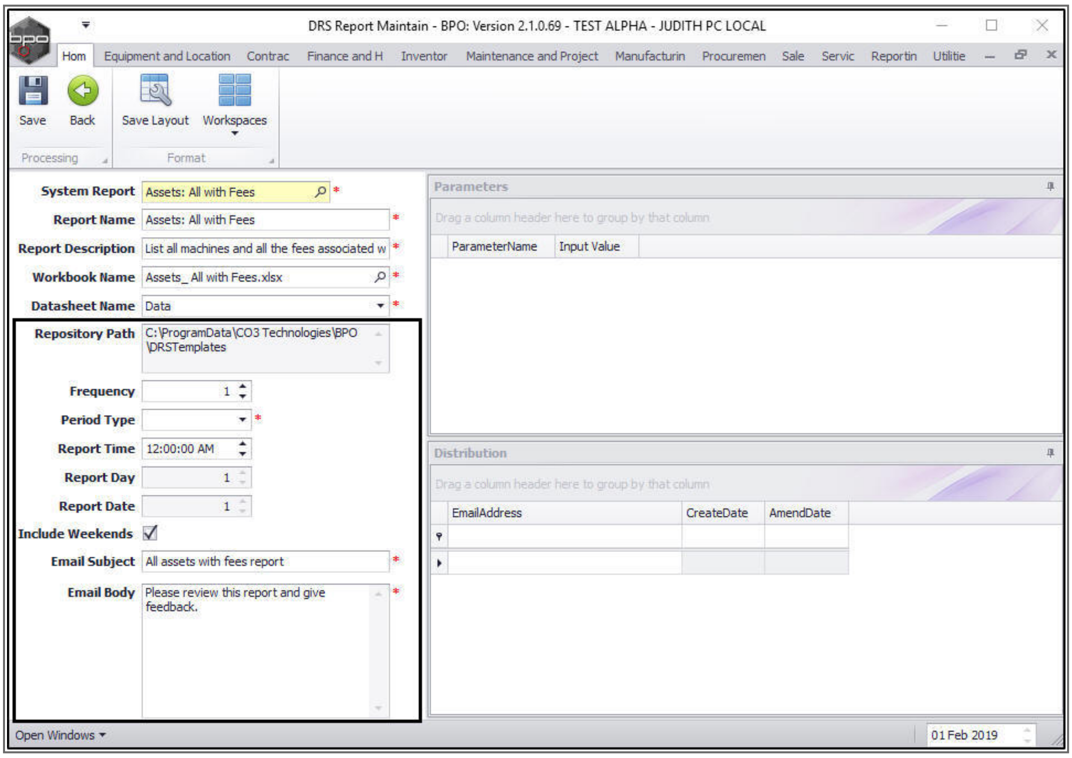


1. The **Datasheet Name** drop-down menu will be displayed.
2. Select the relevant data sheet from the list.
   - **Note**: This is the datasheet to which the data will be imported, so it should have the **same format** as the system report to ensure that the data will not be mismatched. For example, you cannot link a graphical datasheet to this.
3. In this image, **Data** has been selected.



- **Repository Path:** This will be auto populated with the repository path configured on the system.
- **Frequency:** Type in the frequency that you want the emails to be send or you the up and down arrows to select the frequency.
    - **Note:** If you choose **1**, it means daily or every month, if you choose **2**, it means every second day or second month etc. depending on the selected period type.
- **Period Type:** Click on the drop-down arrow in this field and select the period type from the menu.
- **Report Time:** This is the time when the report will be emailed. This field will be auto populated with a default time. Either type in or click on the directional arrows to select an alternative time if required.
- **Report Day:** Here you can set the day you wish the report to be sent. **1** represents Monday, **2** represents Tuesday etc. You can either type in or use the directional arrows to select the required day.

- **Note:** This will be greyed out if the selected period type is set to **daily**.
- **Report Date:** This allows you to set the date that you wish the report to be sent e.g. the 25th. You can either type in or use the directional arrows to select the required date.
    - **Note:** This will be greyed out if the selected period type is set to daily or weekly.
- **Include Weekends:** Select this check box if you want the report to be sent even if the date falls on a weekend.
- **Email Subject:** Type in the email subject here.
- **Email Body:** Type in the email body here.



REPORT PARAMETERS

1. The **Parameters** panel

If the report you are adding has **parameters** , they will be displayed in this panel.

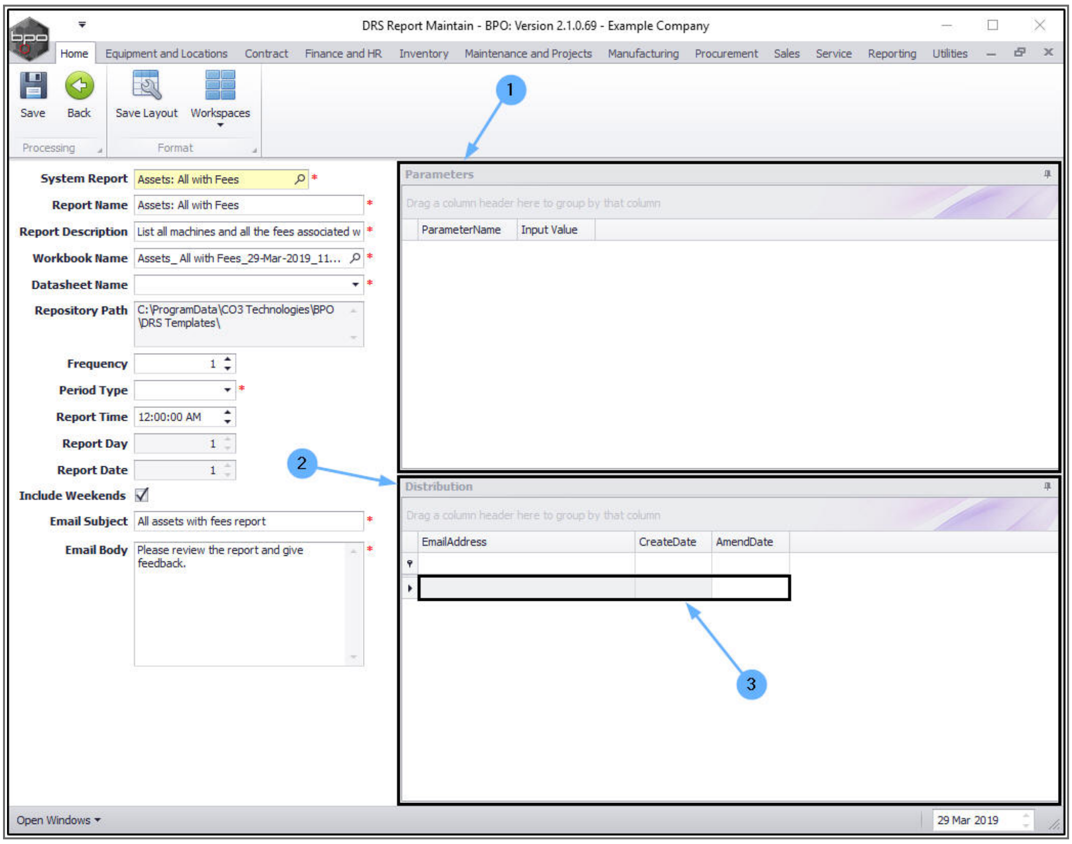
REPORT DISTRIBUTION

2. The **Distribution** panel

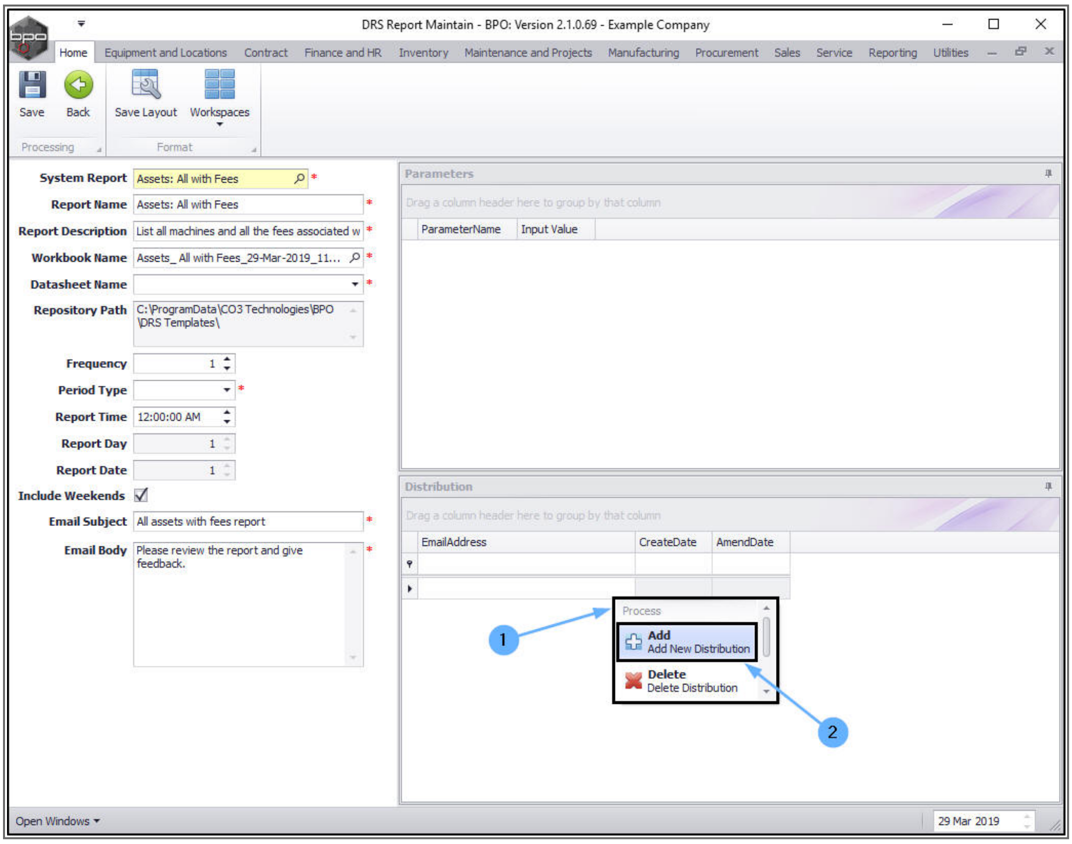
   You can add the email address(es) of the recipient(s) of this report in this panel.

Add Email Address

3. **Right click** anywhere in a **blank** row (not the filter row).



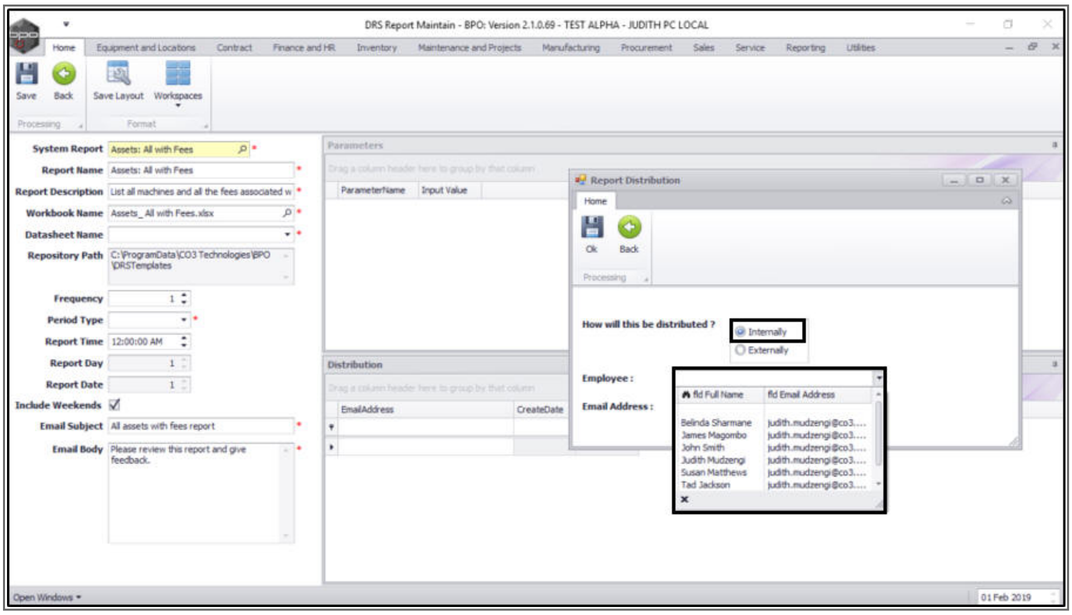
1. A **Process** menu will be displayed.
2. Click on **Add - Add New Distribution**.



- The **Report Distribution** screen will pop up asking you;
    - **How will this be distributed, internally or externally?**

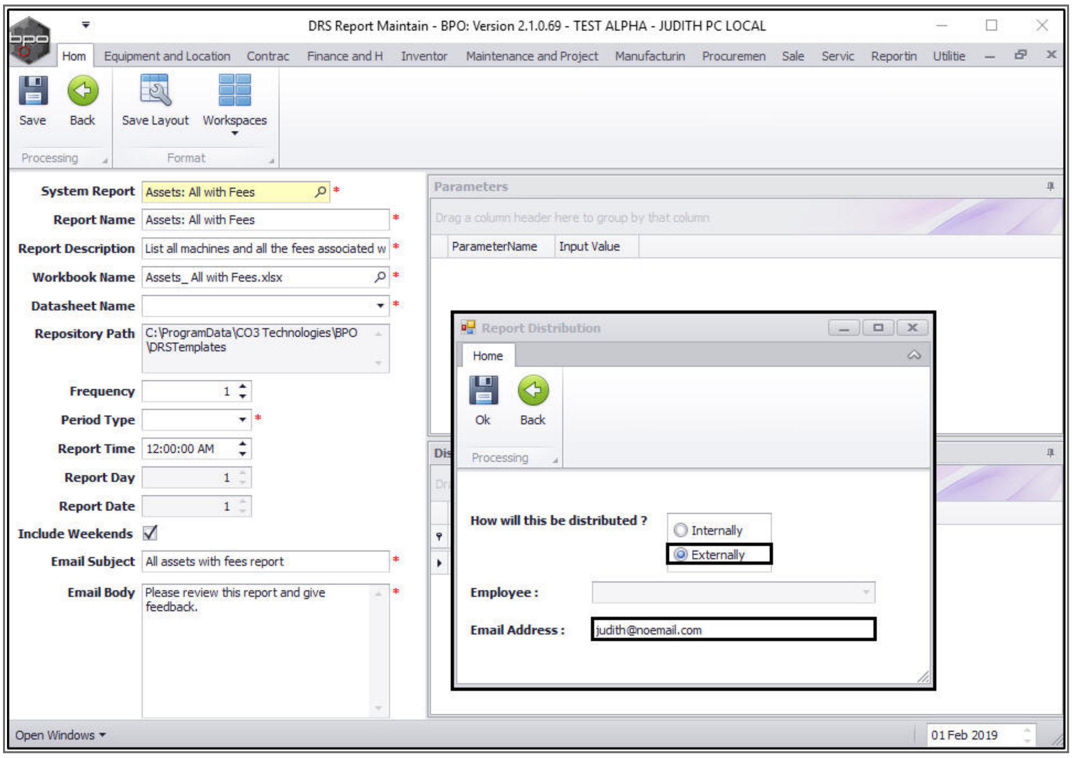
Internally

- If you select **Internally** - when you click on the **drop-down arrow** in the **Employee** field, a list of your company's employees and their internal email addresses (company) will be displayed for you to select from.



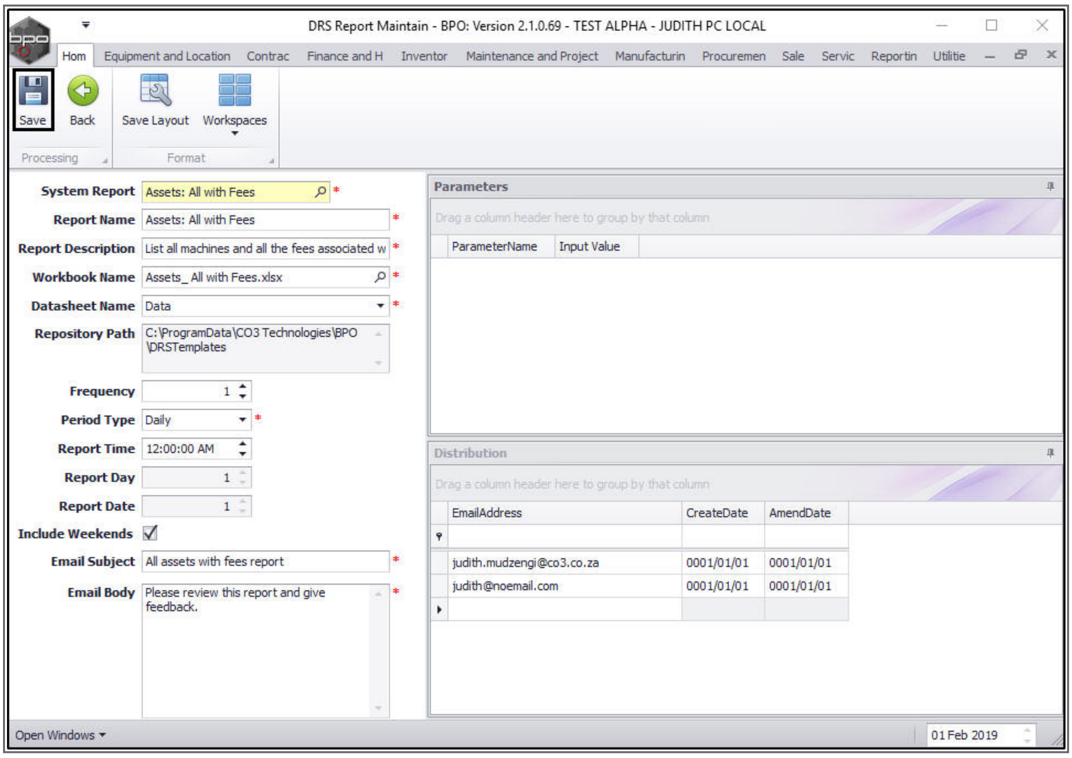
Externally

- If you select **Externally** - the **Employee** field will be uneditable (greyed out), you will need to type in the recipient's email address in the **Email Address** field.

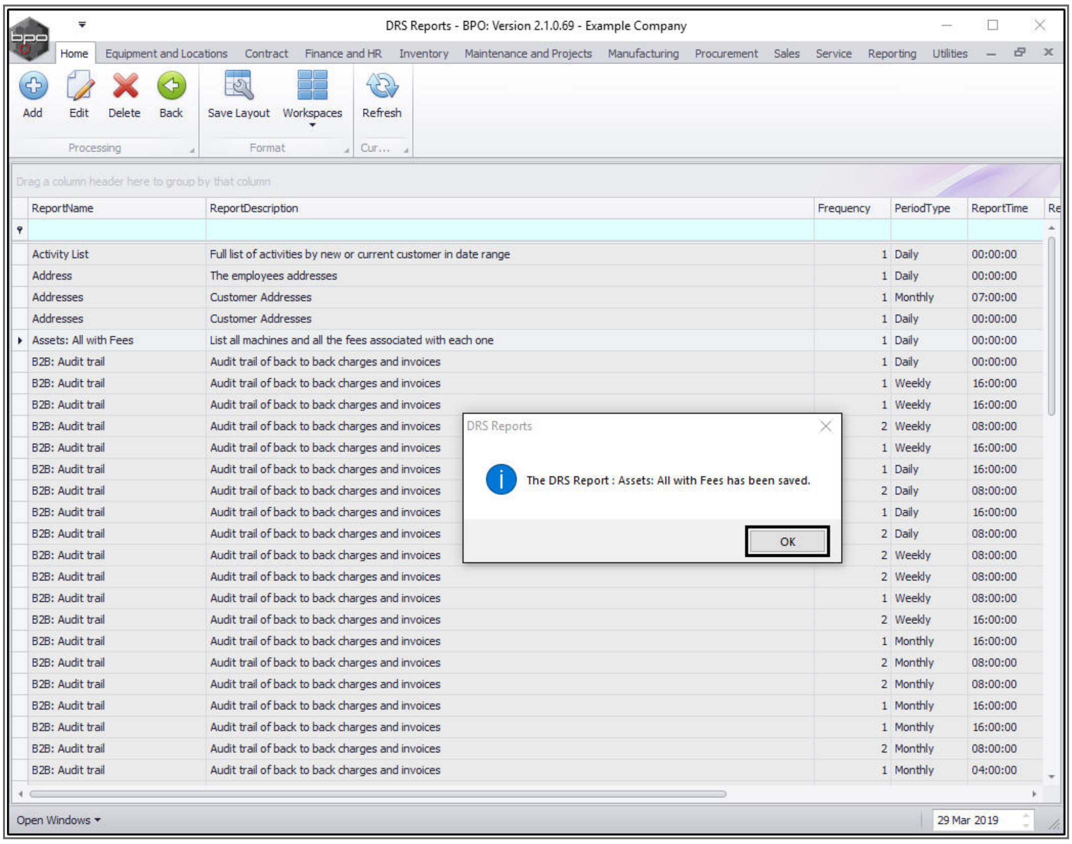


SAVE DRS REPORT

- When you have selected the recipients for the report distribution, click on **Save**.

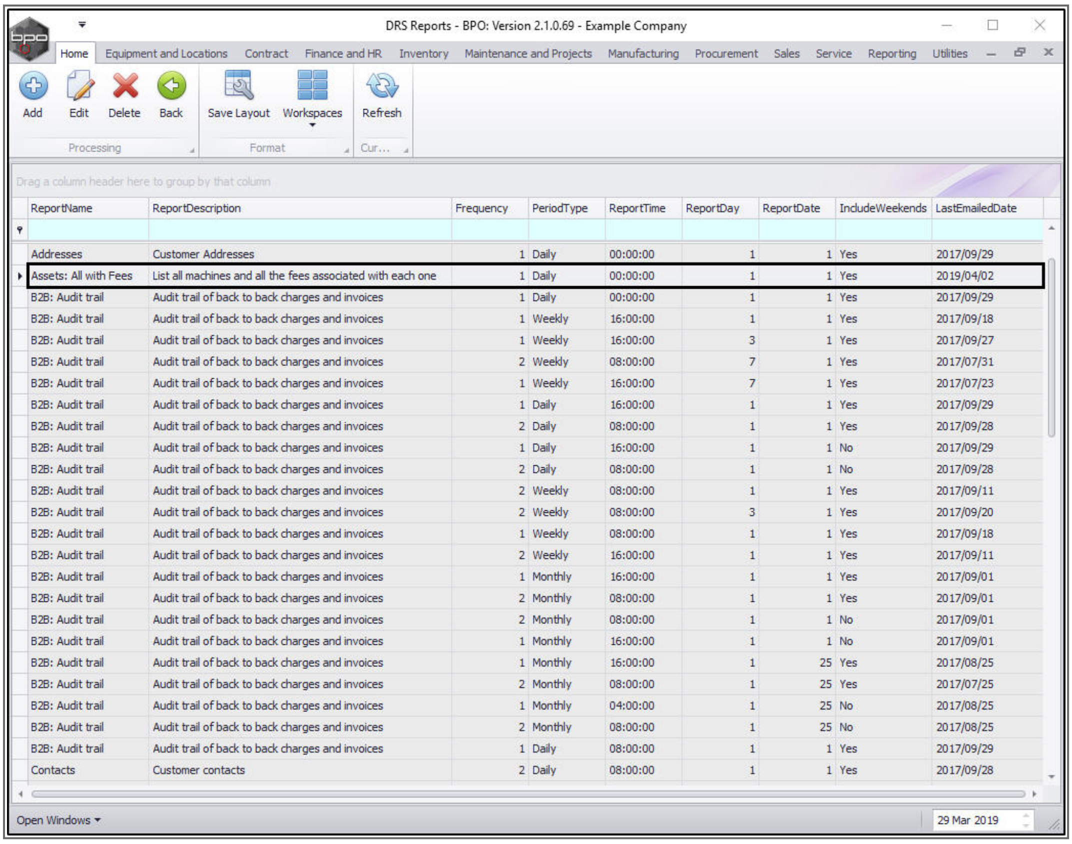


- You will return to the **DRS Reports** listing screen.
- A **DRS Reports** message box will pop up informing you that;
    - **The DRS Report: [ ] has been saved.**
- Click on **Ok**.



VIEW DRS REPORT

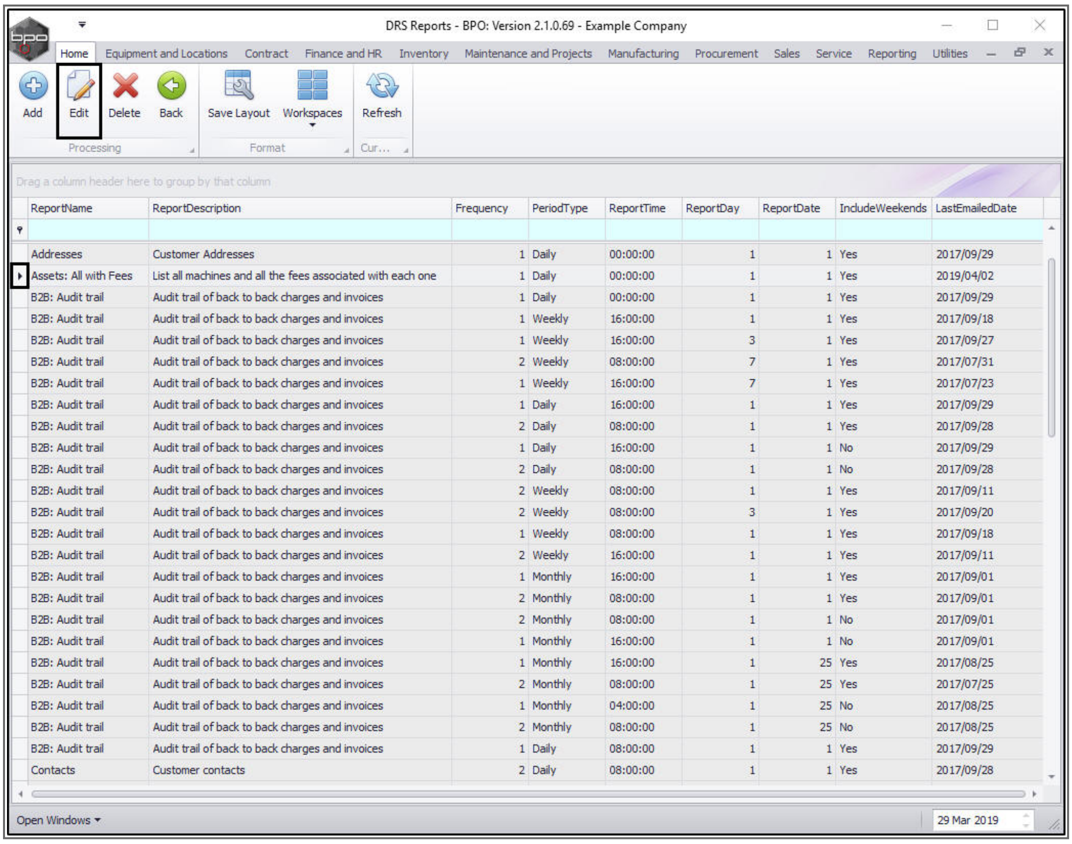
- You can now view the saved report in this screen.



ReportName	ReportDescription	Frequency	PeriodType	ReportTime	ReportDay	ReportDate	IncludeWeekends	LastEmailedDate
Addresses	Customer Addresses	1	Daily	00:00:00	1	1	Yes	2017/09/29
Assets: All with Fees	List all machines and all the fees associated with each one	1	Daily	00:00:00	1	1	Yes	2019/04/02
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	00:00:00	1	1	Yes	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	1	1	Yes	2017/09/18
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	3	1	Yes	2017/09/27
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	7	1	Yes	2017/07/31
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	7	1	Yes	2017/07/23
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	16:00:00	1	1	Yes	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Daily	08:00:00	1	1	Yes	2017/09/28
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	16:00:00	1	1	No	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Daily	08:00:00	1	1	No	2017/09/28
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	1	1	Yes	2017/09/11
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	3	1	Yes	2017/09/20
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	08:00:00	1	1	Yes	2017/09/18
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	16:00:00	1	1	Yes	2017/09/11
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	1	Yes	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	1	Yes	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	1	No	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	1	No	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	25	Yes	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	25	Yes	2017/07/25
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	04:00:00	1	25	No	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	25	No	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	08:00:00	1	1	Yes	2017/09/29
Contacts	Customer contacts	2	Daily	08:00:00	1	1	Yes	2017/09/28

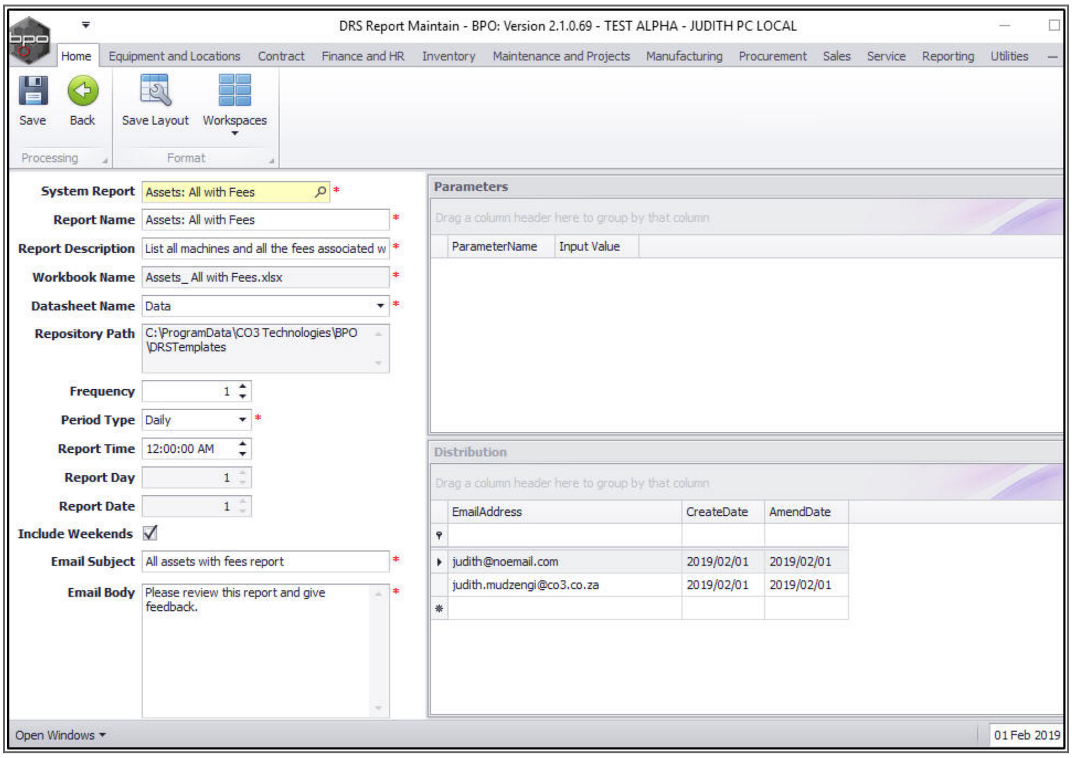
EDIT DRS REPORT

- In the **DRS Reports** listing screen, select the **report** that you wish to edit.
- Click on **Edit**.
- In this example, the **Assets: All with Fees** report has been selected.



ReportName	ReportDescription	Frequency	PeriodType	ReportTime	ReportDay	ReportDate	IncludeWeekends	LastEmailedDate
Addresses	Customer Addresses	1	Daily	00:00:00	1	1	Yes	2017/09/29
Assets: All with Fees	List all machines and all the fees associated with each one	1	Daily	00:00:00	1	1	Yes	2019/04/02
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	00:00:00	1	1	Yes	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	1	1	Yes	2017/09/18
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	3	1	Yes	2017/09/27
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	7	1	Yes	2017/07/31
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	16:00:00	7	1	Yes	2017/07/23
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	16:00:00	1	1	Yes	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Daily	08:00:00	1	1	Yes	2017/09/28
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	16:00:00	1	1	No	2017/09/29
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Daily	08:00:00	1	1	No	2017/09/28
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	1	1	Yes	2017/09/11
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	08:00:00	3	1	Yes	2017/09/20
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Weekly	08:00:00	1	1	Yes	2017/09/18
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Weekly	16:00:00	1	1	Yes	2017/09/11
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	1	Yes	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	1	Yes	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	1	No	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	1	No	2017/09/01
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	16:00:00	1	25	Yes	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	25	Yes	2017/07/25
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Monthly	04:00:00	1	25	No	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	2	Monthly	08:00:00	1	25	No	2017/08/25
B2B: Audit trail	Audit trail of back to back charges and invoices	1	Daily	08:00:00	1	1	Yes	2017/09/29
Contacts	Customer contacts	2	Daily	08:00:00	1	1	Yes	2017/09/28

- The **DRS Report Maintain** screen will be displayed.

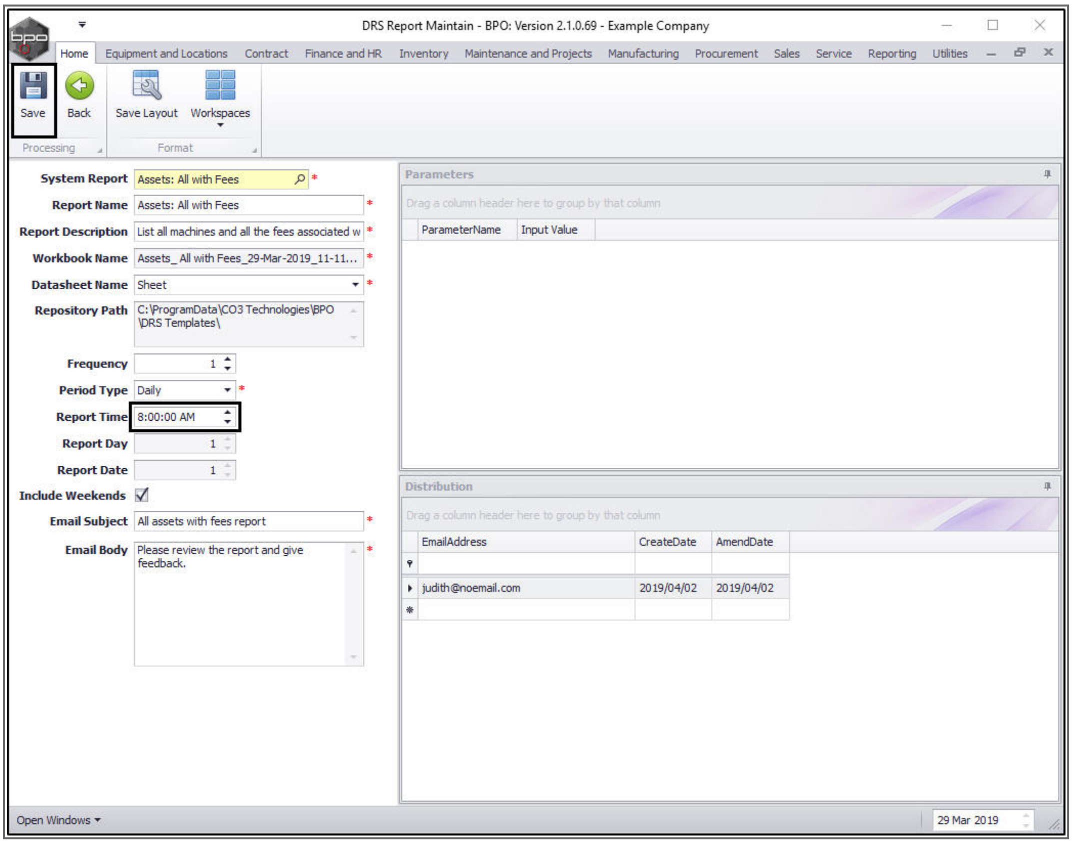


EDIT REPORT DETAILS

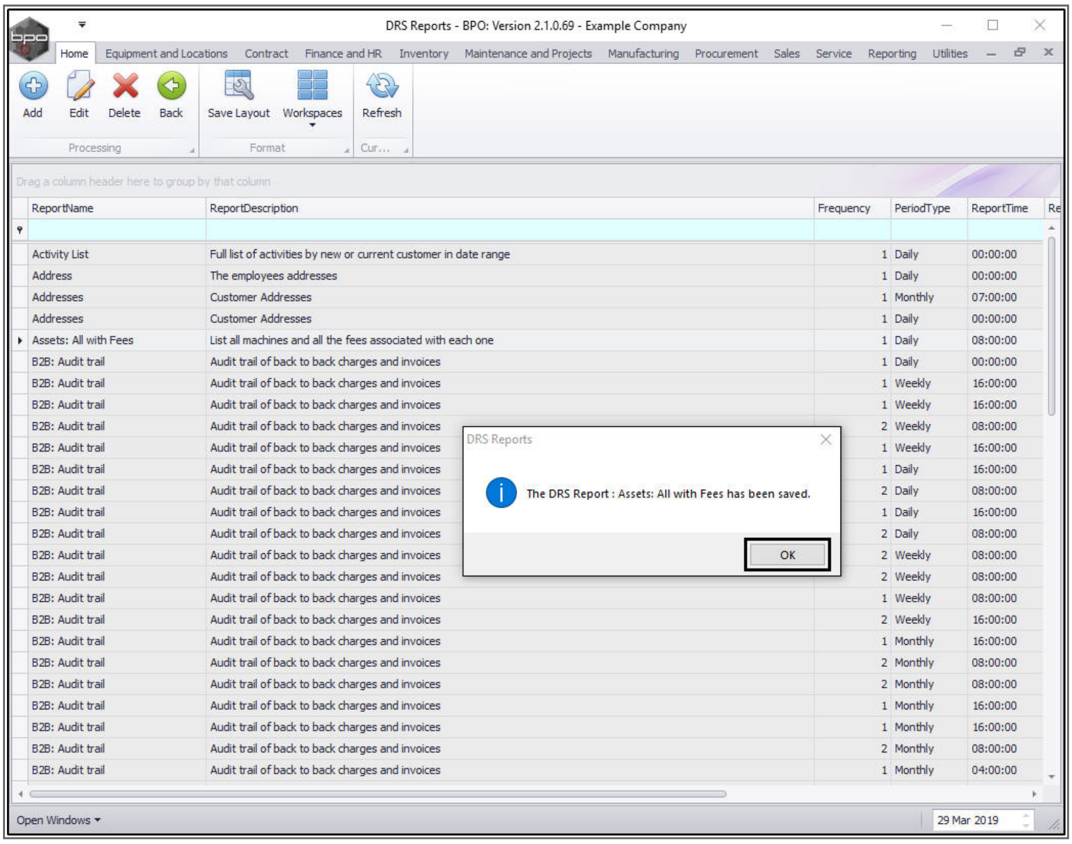
- Make the changes, as required.
    - In this example, the **Report Time** has been adjusted.

SAVE CHANGES

- Click on **Save**.

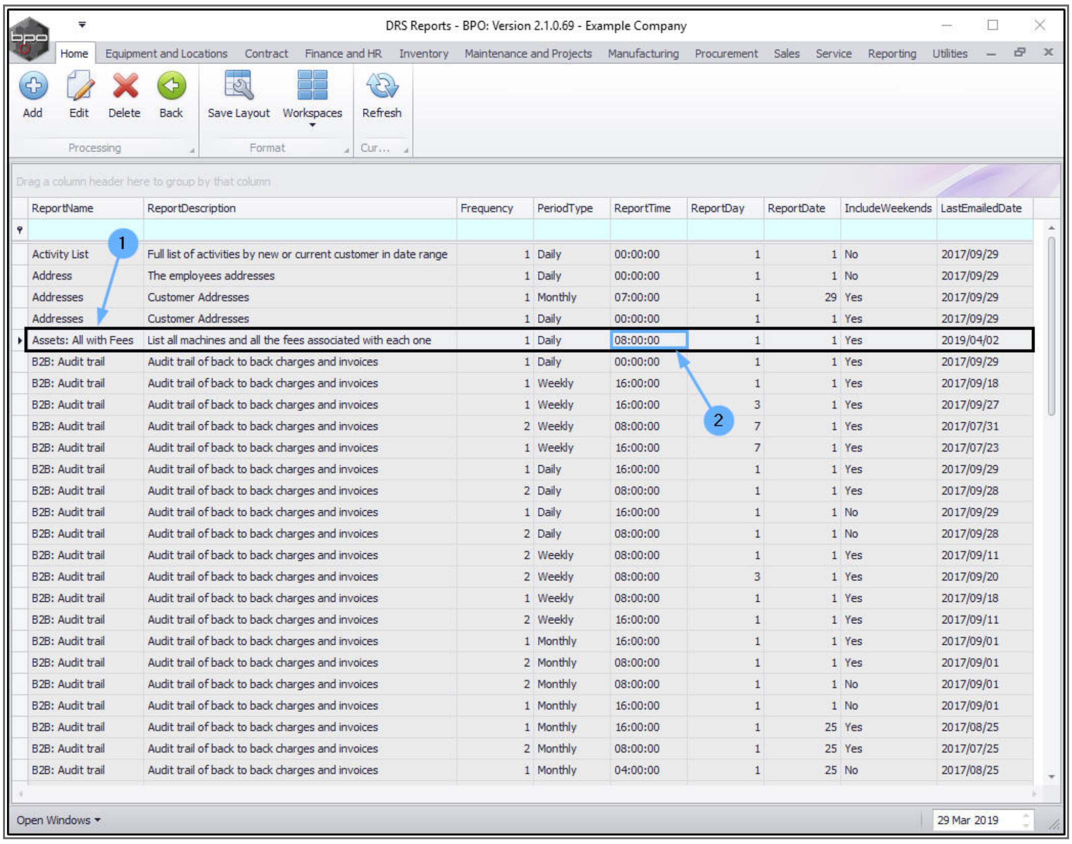


- You will return to the **DRS Reports** listing screen.
- A **DRS Reports** message box will pop up informing you that;
    - **The DRS Report: [ ] has been saved.**
- Click on **Ok**.



VIEW EDITED REPORT

1. You can now view the edited report in this screen.
2. In this example, the **Report Time** is now displayed as **08:00:00**.



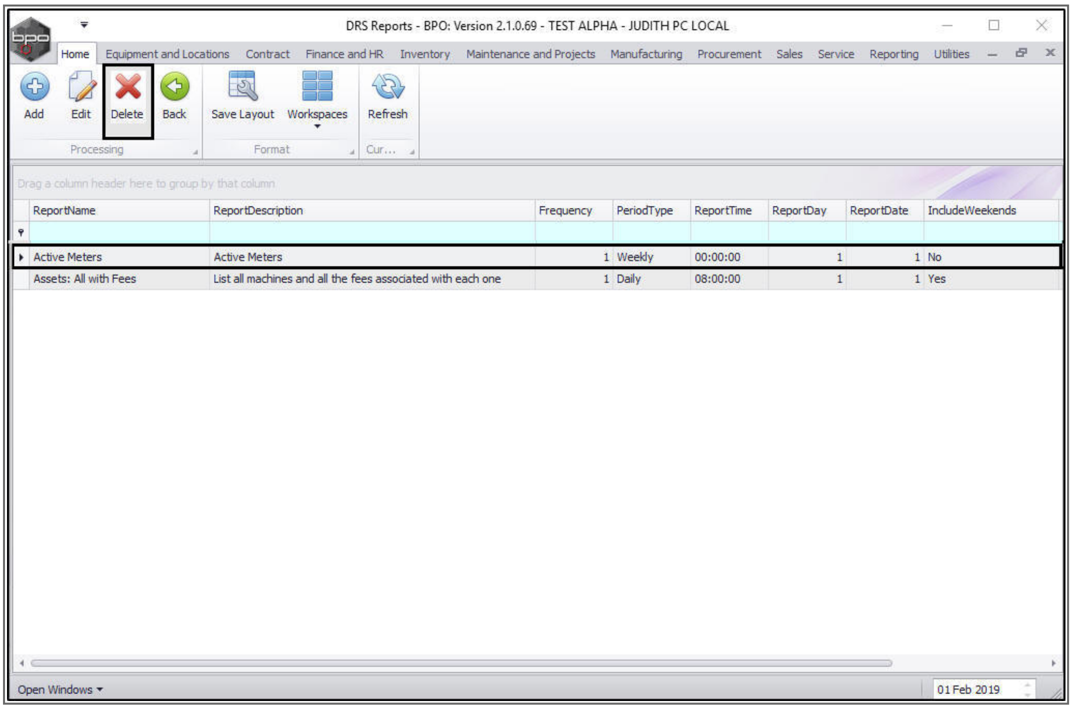
DELETE A DRS REPORT.

SELECT THE REPORT

- In the **DRS Reports** listing screen, select the **report** that you wish to delete.

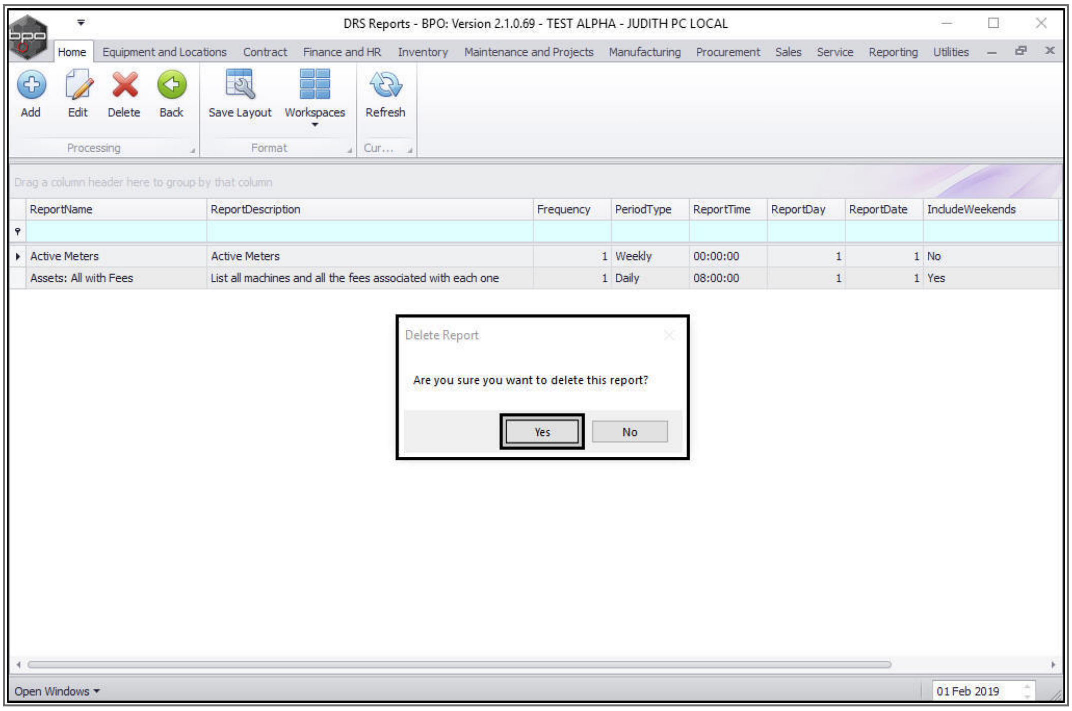
SELECT DELETE

- Click on **Delete**.
- In this example, the **Active Meters** report has been selected.

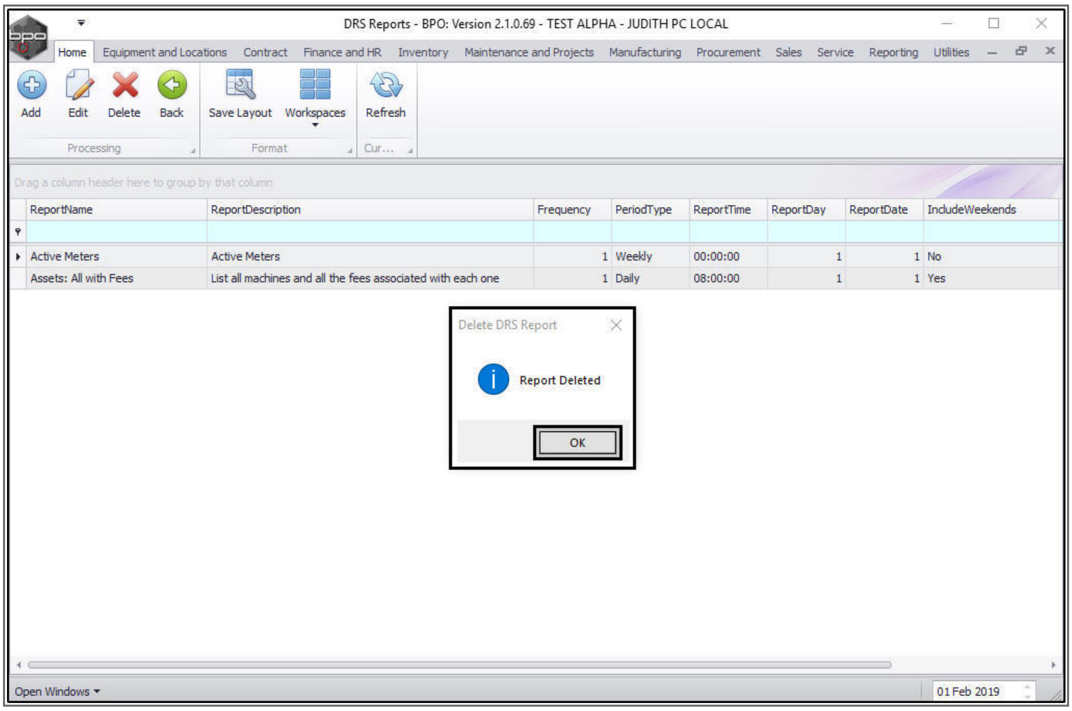


CONFIRM DELETION

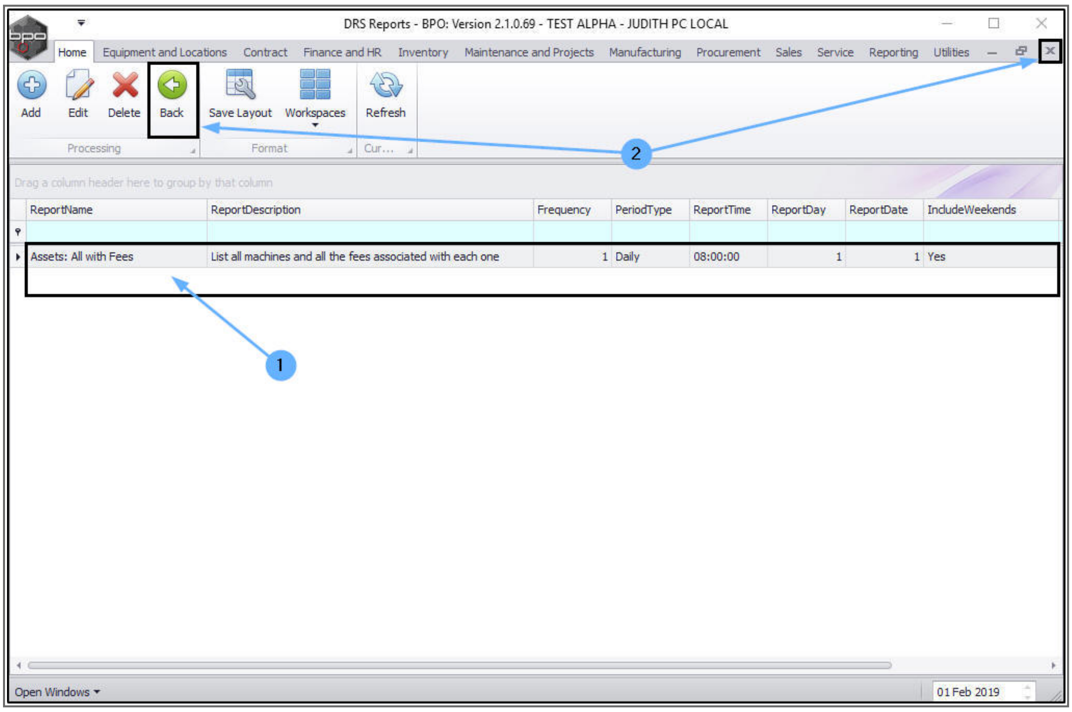
- A **Delete Report** message box will pop up asking;
    - **Are you sure you want to delete this report?**
- Click on **Yes**.



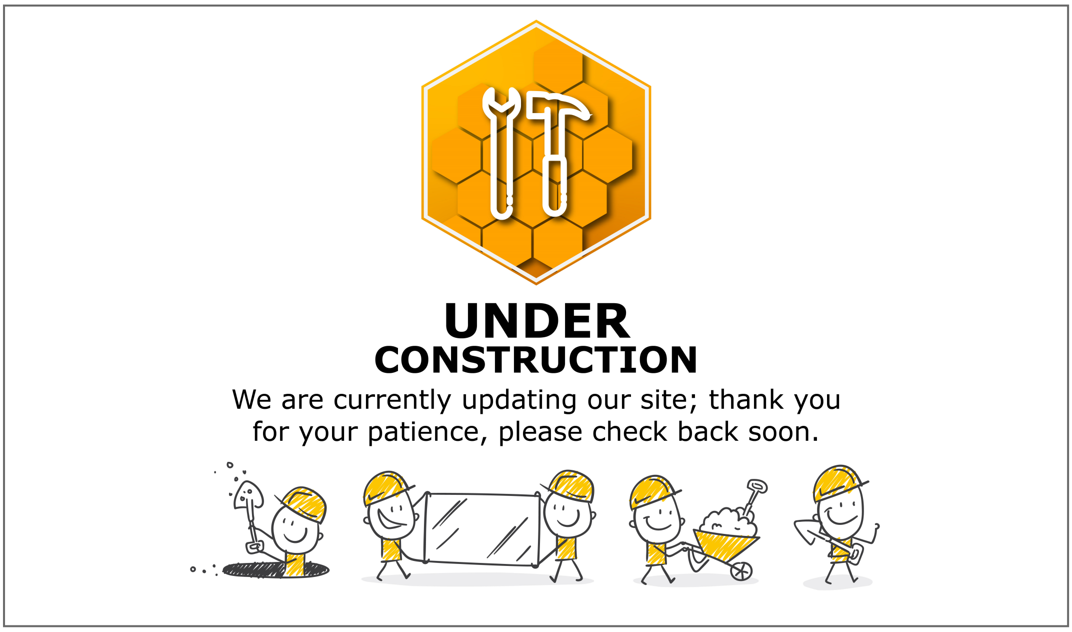
- A **Delete DRS Report** message box will pop up informing you that;
  - **Report Deleted.**
- Click on **OK**.



1. The report will be **removed** from the **DRS Reports** listing screen.
2. Click on **Back** or **Close** the screen when you are done.



EMAILING DRS REPORTS



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