

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

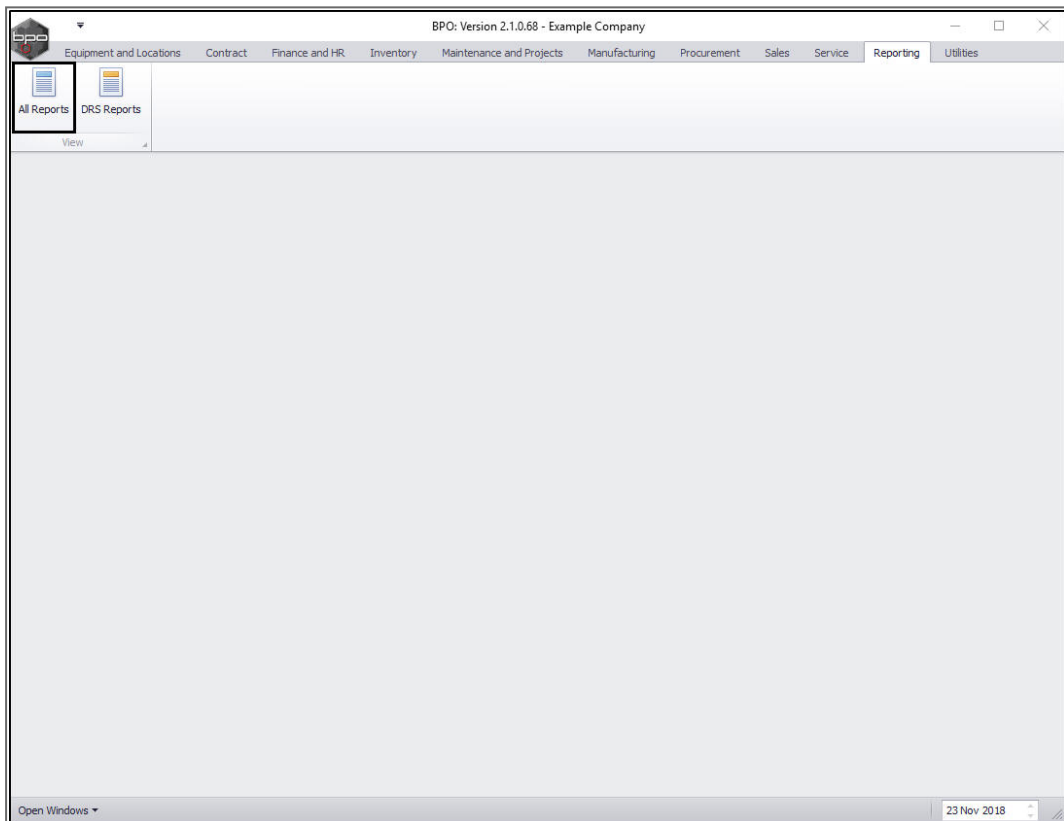
REPORTING

ALL REPORTS – VIEW REPORTS

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

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

Ribbon Access: Reporting > All Reports



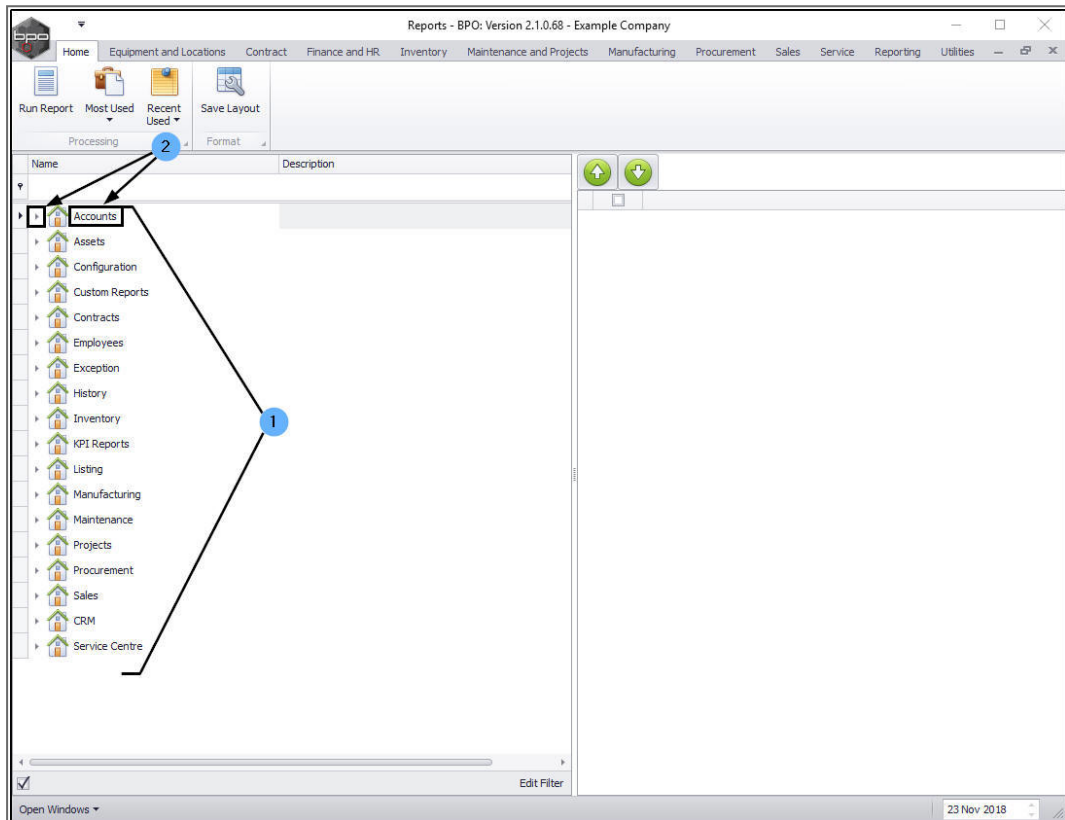
VIEW MAIN REPORT CATEGORIES

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

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

VIEW SUB-REPORT CATEGORIES

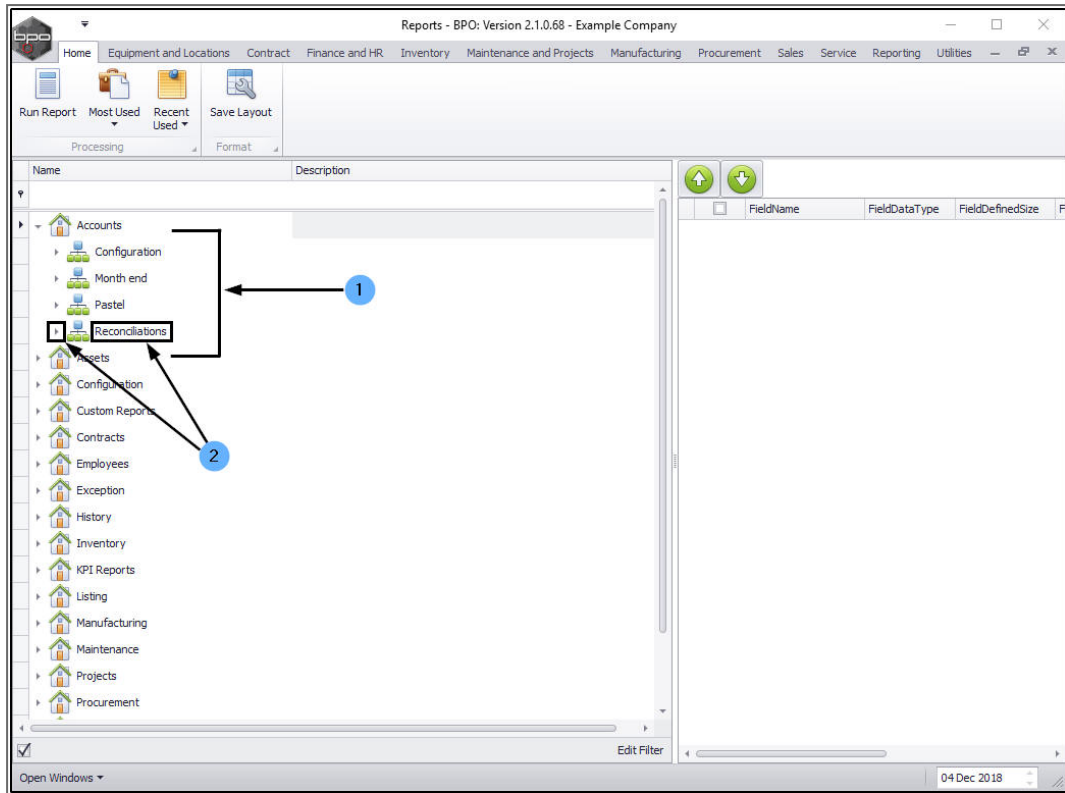
2. A tree view node in front of a category indicates that it is divided into **sub**-categories. Click on this node or double click on the name of the main category.



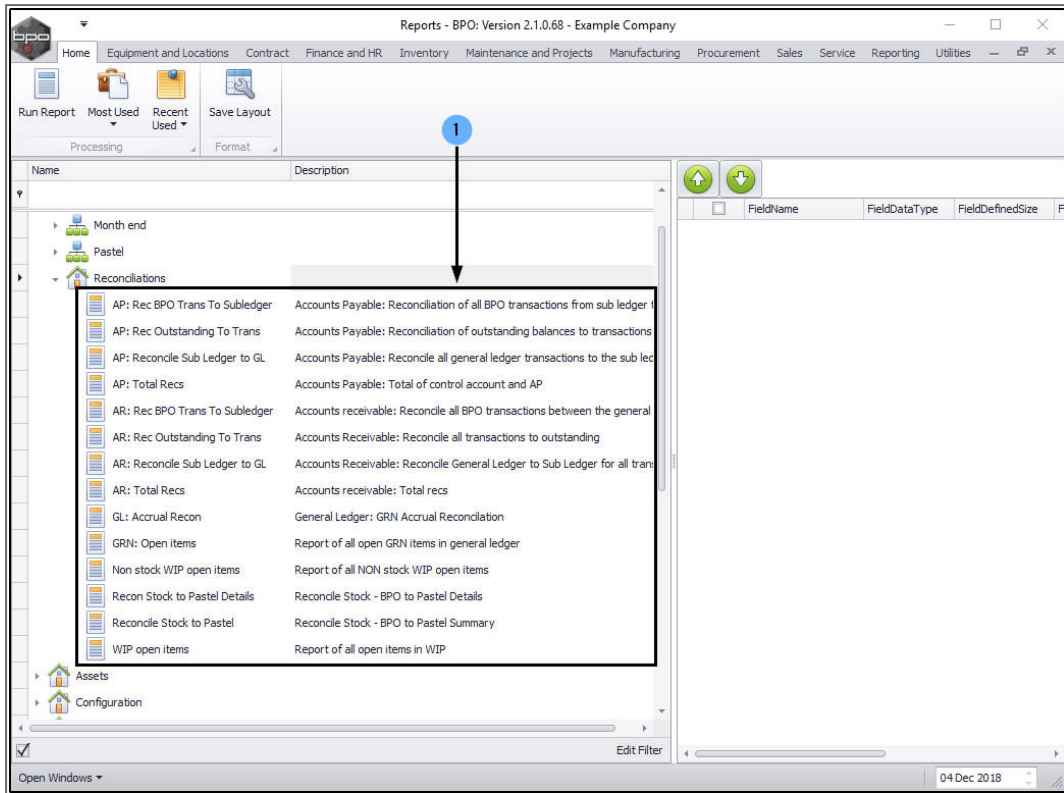
1. The **sub**-categories for the selected main category will be displayed.

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.

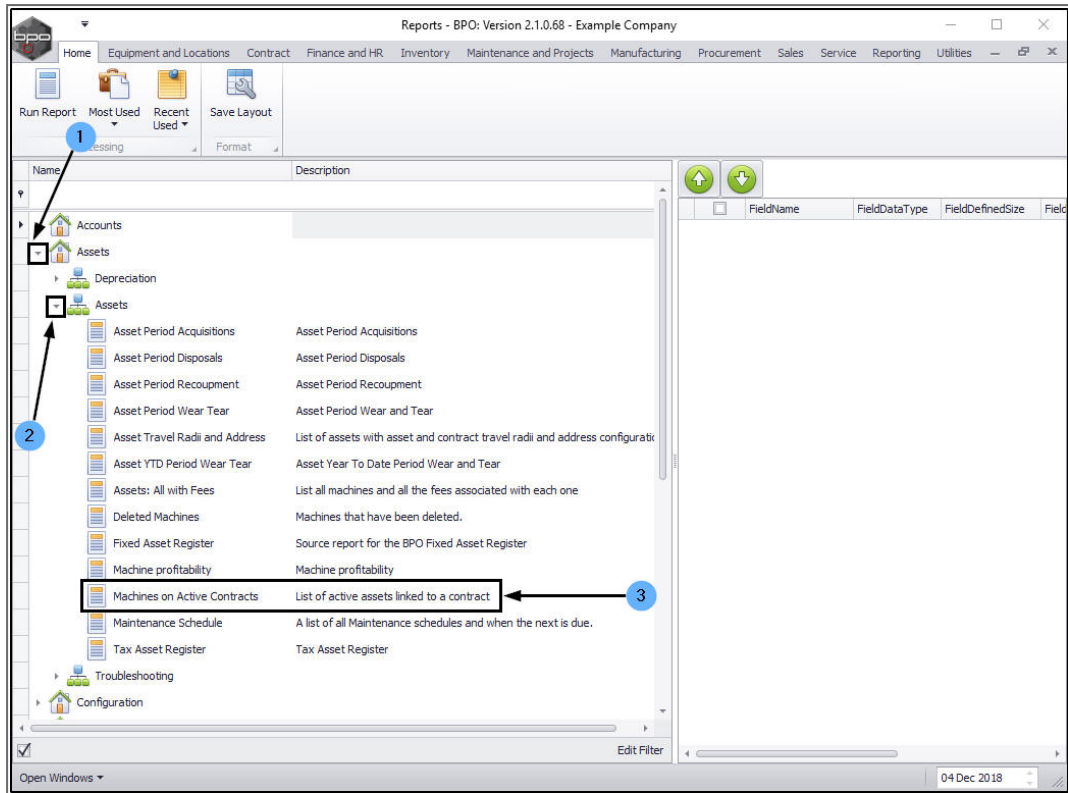


CUSTOMISE A REPORT

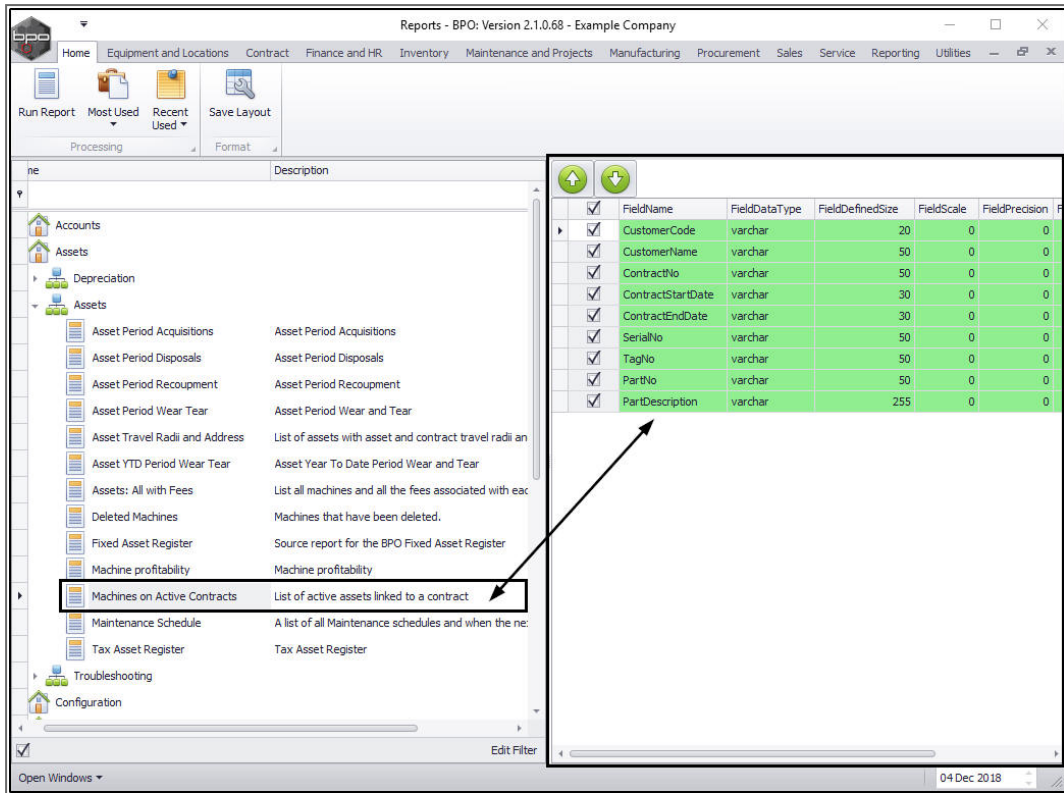
Select the report that you wish to customise:

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.



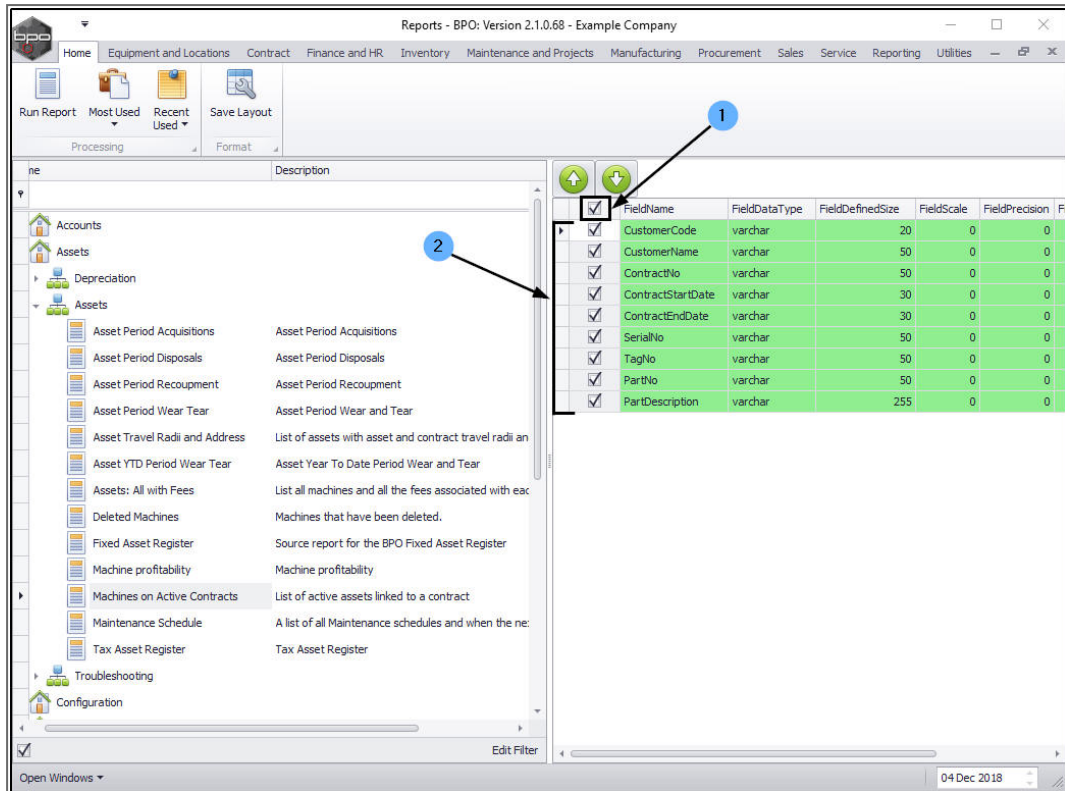
- As you single click on the selected report, the frame on the right side of the screen will populate with the fields or columns available within that report.



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.

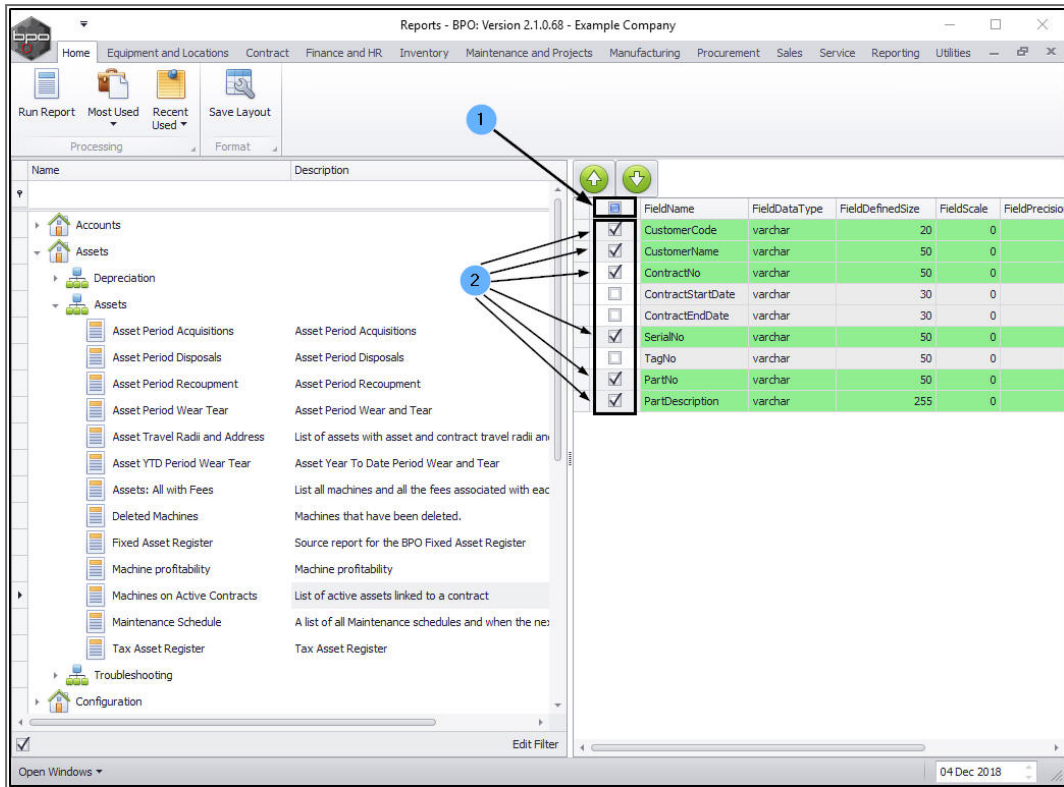
Note: Un-tick the check box in the column header row to deselect all the field/column check boxes.



SELECT REQUIRED FIELDS/COLUMNS

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

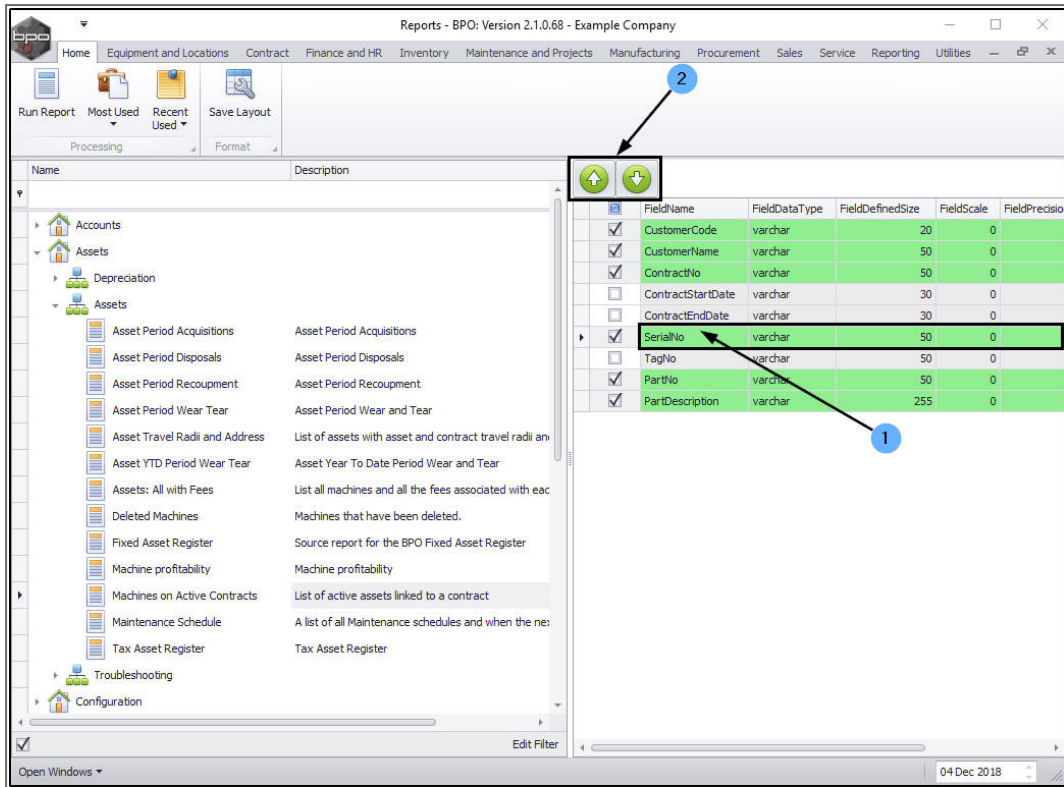
1. To quick clear all the columns, **un-tick** the check box in the column header row.
2. Then click on the check box in the row of **each** of the fields/columns that you wish to see displayed on the report.



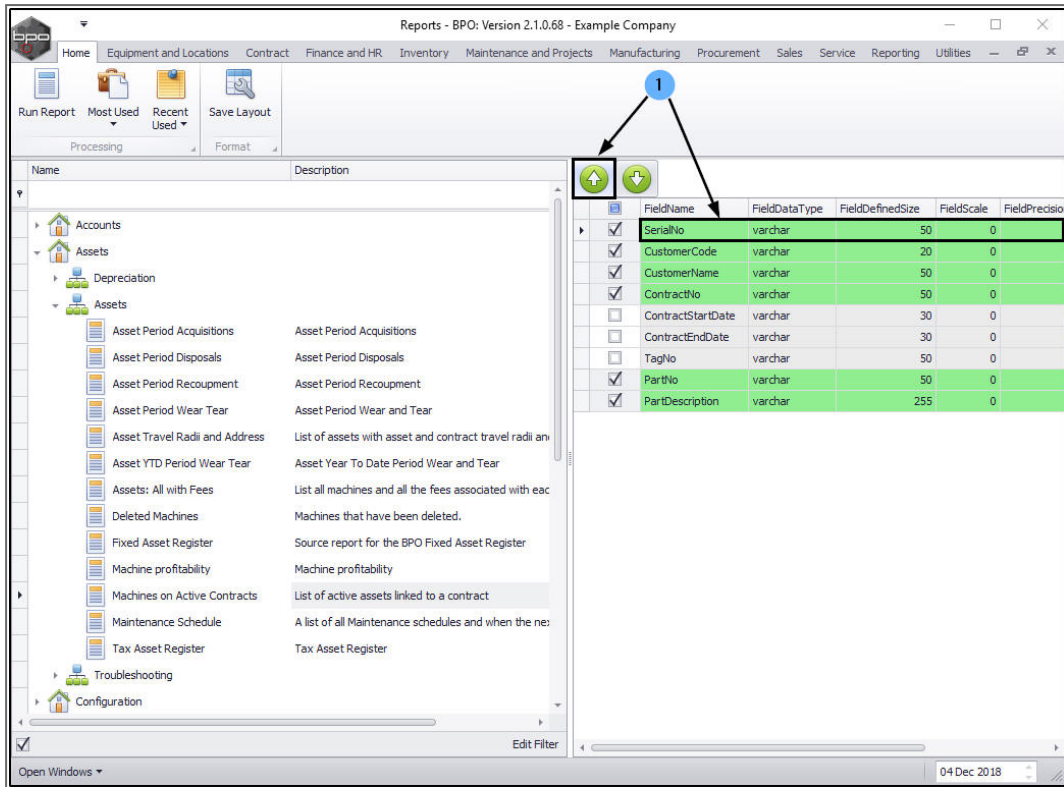
SORTING FIELDS/COLUMNS

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**.

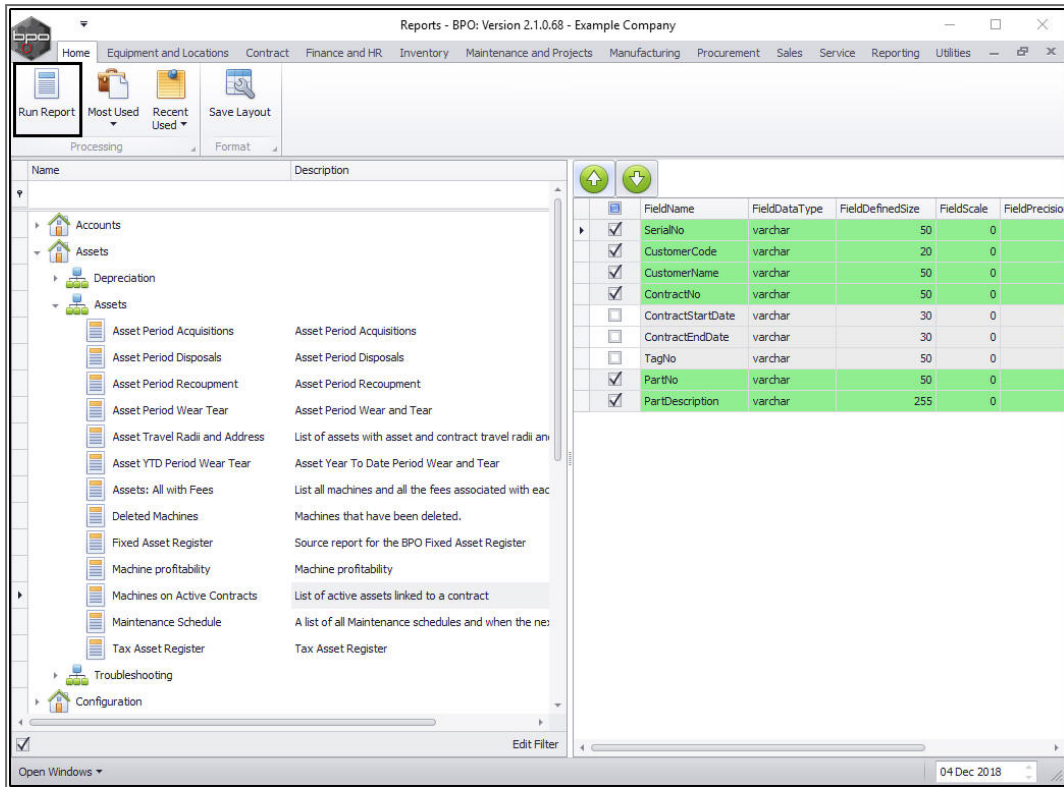


1. In this image you can see the **Serial No.** column has been moved **up** the **Field Name** list, using the **Up** directional arrow.



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.

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

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**.

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 **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
	YES001	Young Electric	CO0000031	SP204	SP204 Colour Copier
	YES001	Young Electric	CO0000031	SP2020	SP2020 Sprint Colour Multi Functional Copier
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

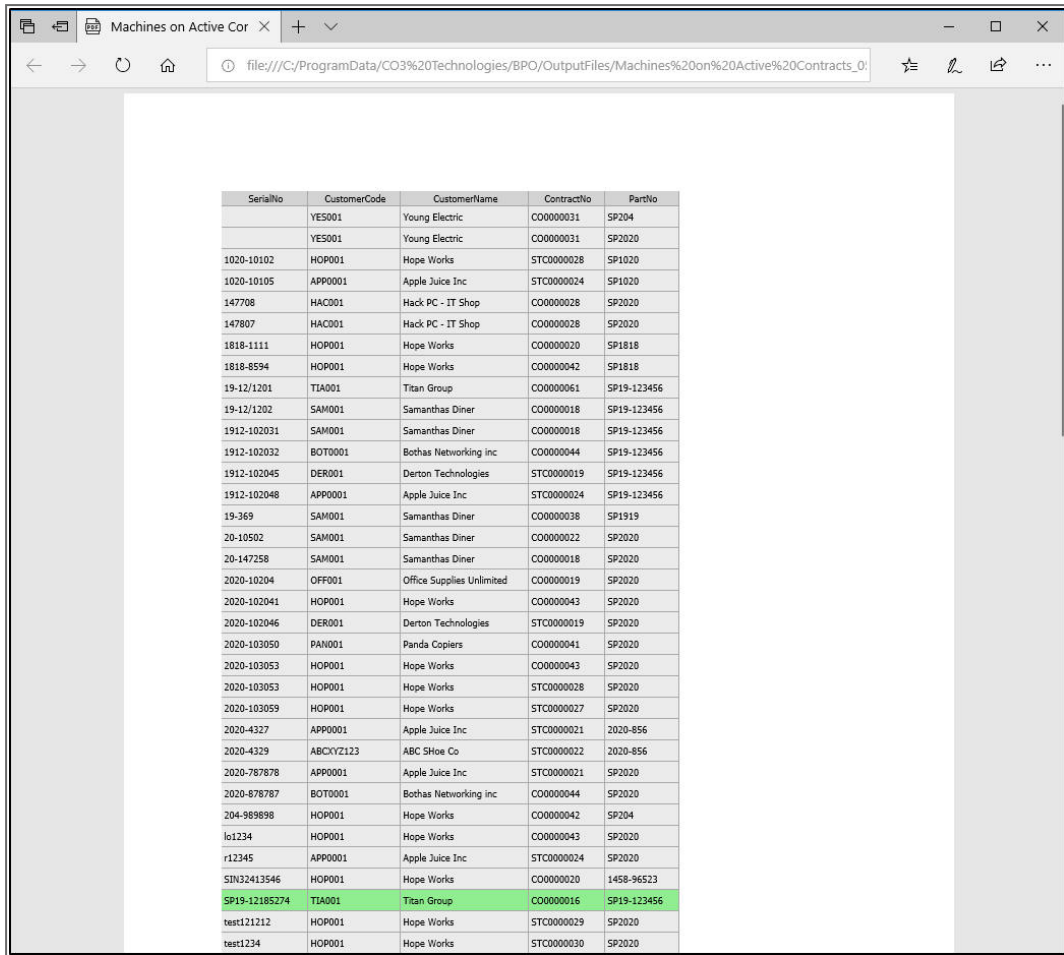
EXPORT TO PDF

- 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.



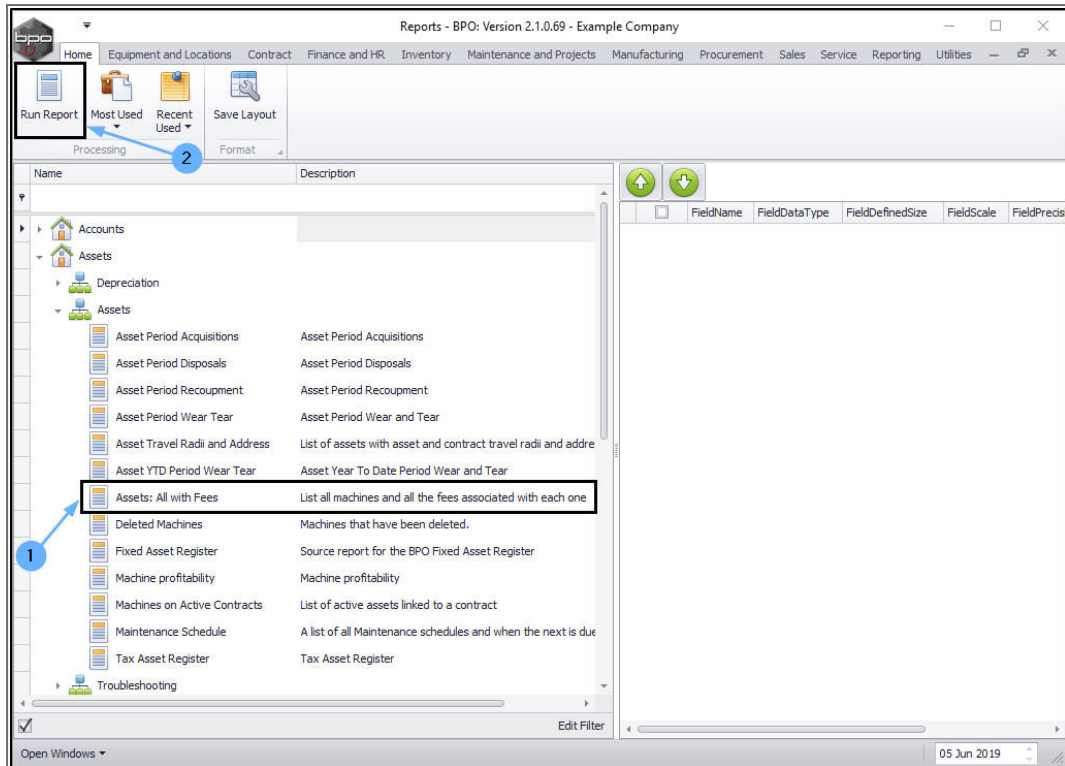
SerialNo	CustomerCode	CustomerName	ContractNo	PartNo
	YES001	Young Electric	CO0000031	SP204
	YES001	Young Electric	CO0000031	SP2020
1020-10102	HOP001	Hope Works	STC0000028	SP1020
1020-10105	APP001	Apple Juice Inc	STC0000024	SP1020
147708	HAC001	Hack PC - IT Shop	CO0000028	SP2020
147807	HAC001	Hack PC - 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	APP001	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	APP001	Apple Juice Inc	STC0000021	2020-856
2020-4329	ABCXY2123	ABC SHoe Co	STC0000022	2020-856
2020-787878	APP001	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	APP001	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:

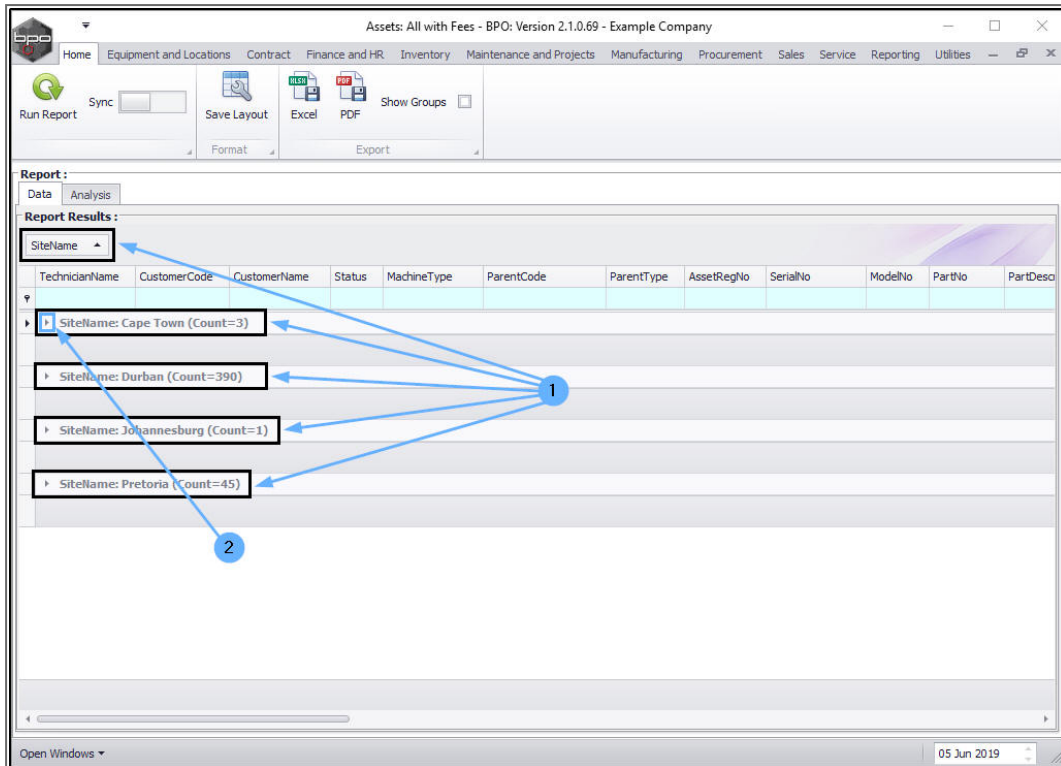
Drag a column header here to group by that column

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 Supplies ...	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

439

05 Jun 2019

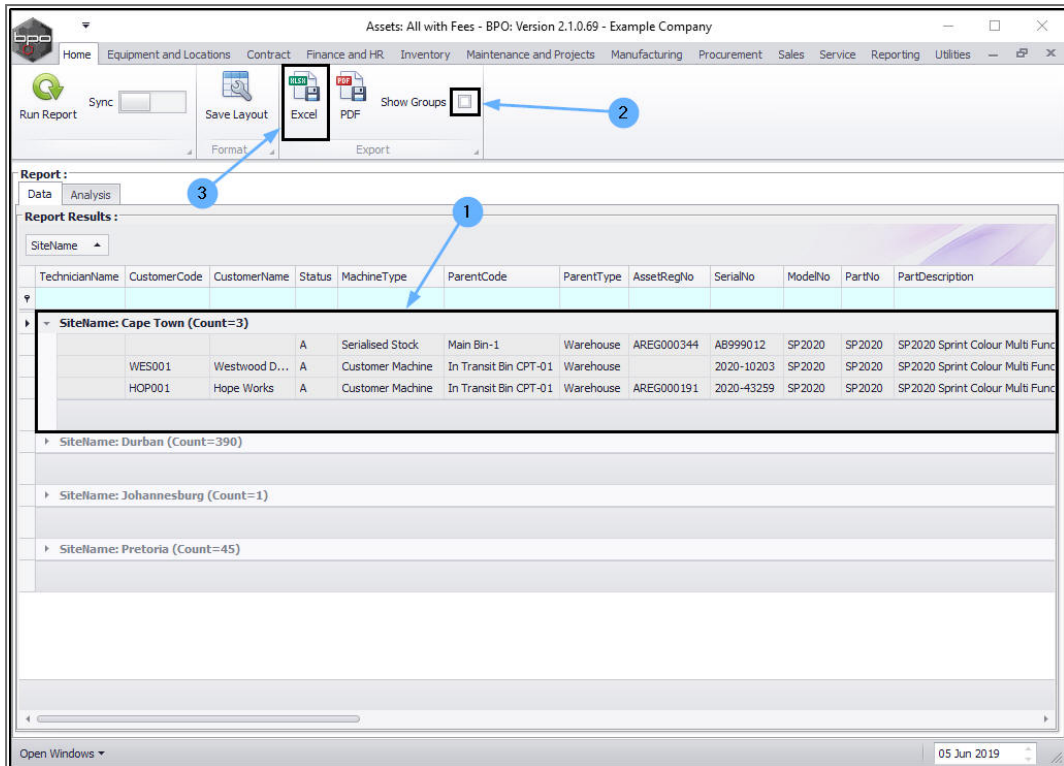
- The report will now be grouped by **sites** and you can view how many assets with fees are in **each** site.
 - Cape Town has 3
 - Durban has 390
 - Johannesburg has 1
 - Pretoria has 45
- Click on the **tree view node** in front of one of the sites.
 - In this example, **Cape Town** is selected.



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.

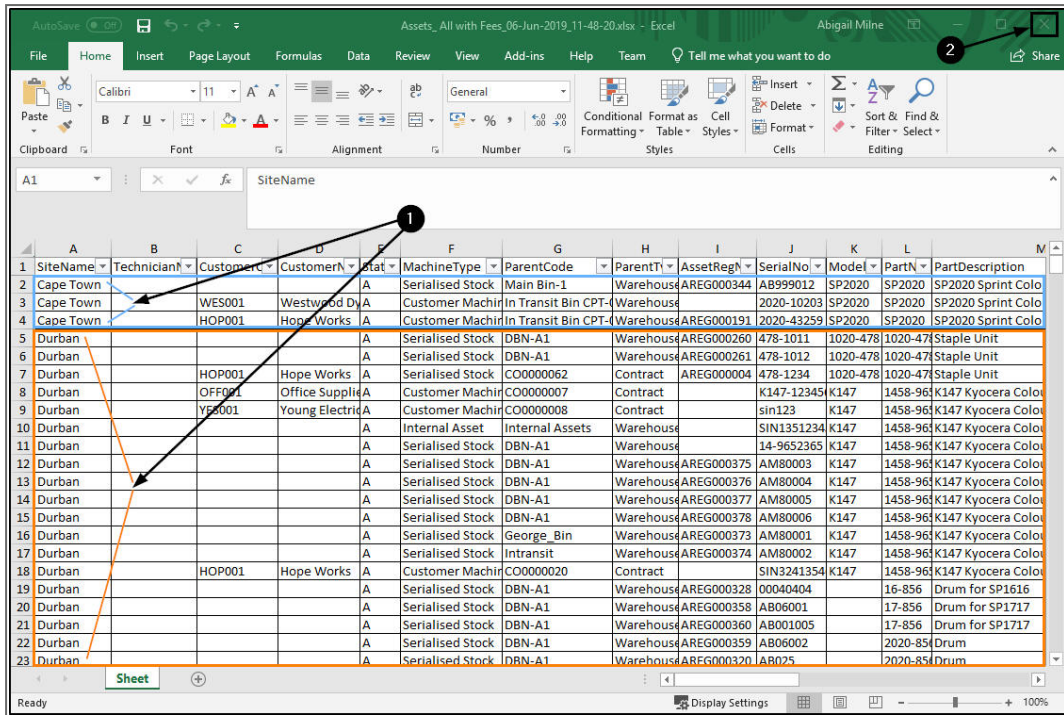
EXPORT REPORT WITHOUT USING THE 'SHOW GROUPS' FUNCTIONALITY

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



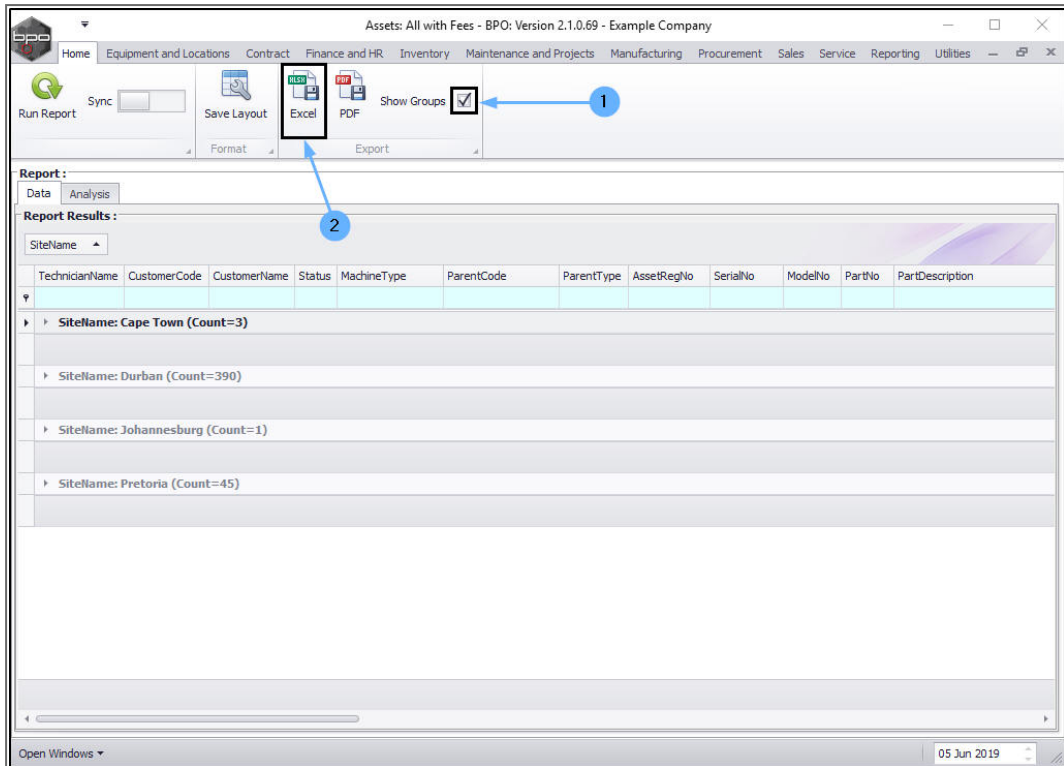
- All of the machines with fees in **each site** will be listed in an **Excel** spreadsheet.

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.



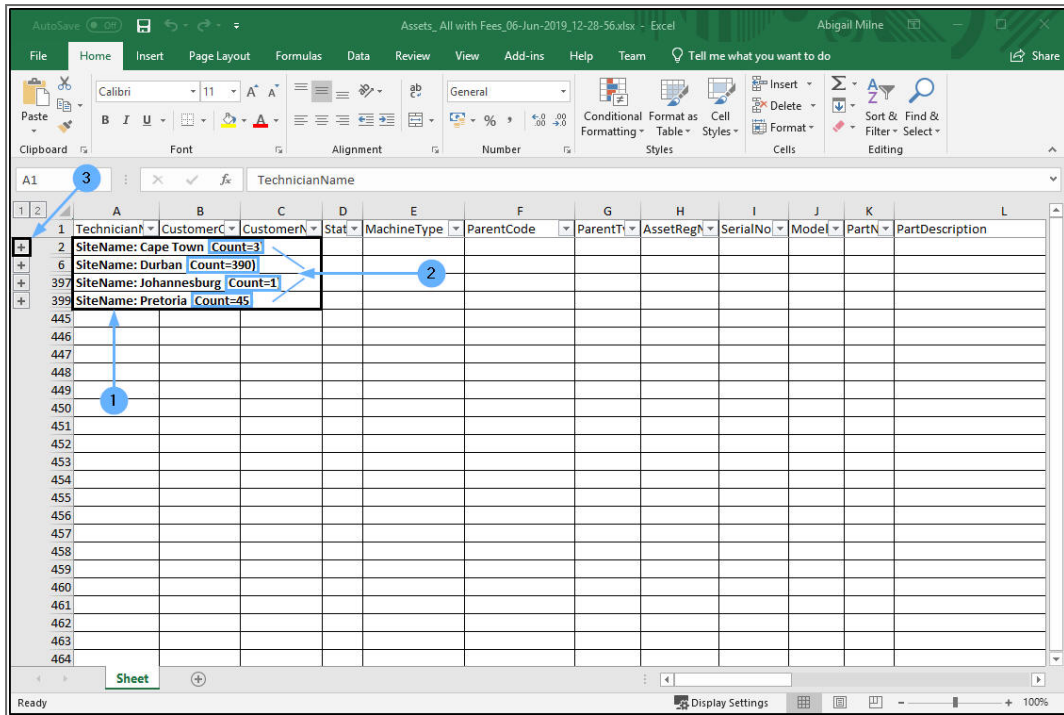
• You will return to the **Assets: All with Fees** screen.

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	Technician	Customer	Customer Name	Status	Machine Type	Parent Code	Parent Type	Asset Reg No	Serial No	Model	Part No	Part De
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)											
445												
446												
447												
448												
449												
450												
451												
452												
453												
454												
455												
456												
457												
458												
459												
460												
461												

- For more information about grouping and report customisation - refer to the [Report View](#) manual.

MNU.079.001